GIEWS Country Brief

The Republic of South Africa

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FOOD SECURITY SNAPSHOT

- **Maize area to increase in 2025, but mixed weather outlook contains early production prospects**
- **Drought results in below-average maize harvest in 2024**
- **Total maize exports expected to decline in 2024/25, but export pace quickens due to robust regional demand**
- **Wholesale maize prices reach record highs after drought-affected harvest**

Maize area to increase in 2025, but mixed weather outlook contains early production prospects

Planting of the 2025 summer season cereal crops is underway, with the harvest anticipated to take place from in April 2025.

Early planting intentions indicate that 2025 maize sowings in the commercial farming sector, which constitutes about 95 percent of the national output, are likely to be close to the five-year average level. The expected area of 2.64 million hectares, however, represents an increase on the previous year's level, as farmers react positively to the high maize grain prices in 2024 driven by a tight national supply. Sorghum plantings are also foreseen to increase by nearly 30 percent year-on-year and reach an above-average level, due to supportive government policies aimed at reviving domestic production.

Along with high crop prices, lower year-on-year fertilizer prices (as of September 2024, in national currency terms) are bolstering profit margins prospects for the 2025 maize crop, which is a further factor supporting expectations of an upturn in plantings.

Regarding weather, seasonal forecasts point to mixed conditions across the main crop-producing regions, which is containing production prospects of the 2025 maize crop. In central provinces, including the leading producing province of Free State, forecasts point to a high likelihood of below-average rainfall amounts from November 2024 to January 2025. By contrast, in northeastern parts, including North-West and Limpopo provinces, forecasts point to above-average rainfall amounts during the same period. As a result of these differing rainfall outlooks, the foreseen year-on-year increase in maize plantings is expected to take place mainly in northeastern provinces, offsetting an anticipated small contraction in plantings in central provinces.

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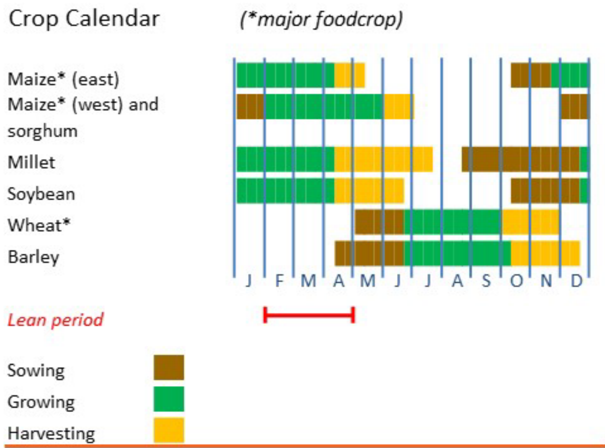

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Cereal Production

	2019-2023 average	2023	2024 estimate	change 2024/avg.
		000 tonnes		percent
Maize	15 458	16 430	13 376	-13.5
Wheat	2 048	2 050	2 000	-2.3
Barley	391	377	399	2.0
Others	203	152	181	-10.9
Total	18 100	19 009	15 956	-11.8

Note: Percentage change calculated from unrounded data.

Drought results in below-average maize harvest in 2024

Total cereal production in 2024 is estimated at 16 million tonnes, about 12 percent below the five-year average. Maize makes up the largest proportion of this output and is pegged at 13.3 million tonnes, about 14 percent below the five-year average. The low output is mainly attributed to significant rainfall deficits, compounded by higher-than-average temperatures.

Harvesting of the 2024 wheat crop is likely to be completed in December and production is estimated at a near-average level of 2 million tonnes, reflecting generally beneficial weather conditions.

Total maize exports expected to decline in 2024/25, but export pace quickens due to robust regional demand

The country is set to continue to be a net exporter of maize in the 2024/25 marketing year (May/April). However, reflecting the reduced 2024 harvest, export quantities are forecast to fall to a level between 2 and 2.5 million tonnes; the five-year average is estimated at 3 million tonnes.

Despite the expected decline in maize exports, the export pace to Southern African countries between May and October 2024 increased by 25 percent compared to the same period in 2023. The quicker pace reflects heightened export demand from neighbouring countries, which are also grappling with the after-effects of the El Niño-associated drought that significantly cut their domestic maize supplies.

Wholesale white maize prices reach record highs after drought-affected harvest

In response to the impact of the drought, wholesale prices of white and yellow maize grain have increased throughout 2024, notwithstanding a brief decline coinciding with the harvest period in May and June 2024. In October, wholesale white maize prices reached a new record level and were nearly 40 percent higher year-on-year. As of October, prices of yellow maize rose by 16 percent on a yearly basis, but remained 10 percent below the all-time highs of November 2022. Two key factors driving these elevated prices are the tight domestic supply and the robust export demand from regional neighbours.

By contrast, wholesale wheat prices have remained more stable in 2024 and were 4 percent lower year-on-year in October. This reflects the low level of prices on the international market and the strengthening of the national currency, given the country's status as a net importer of wheat.

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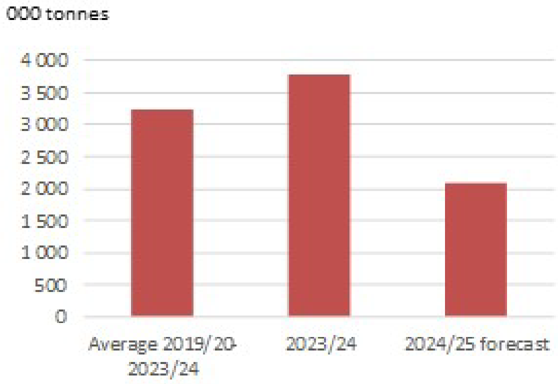
Cereals Exports



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

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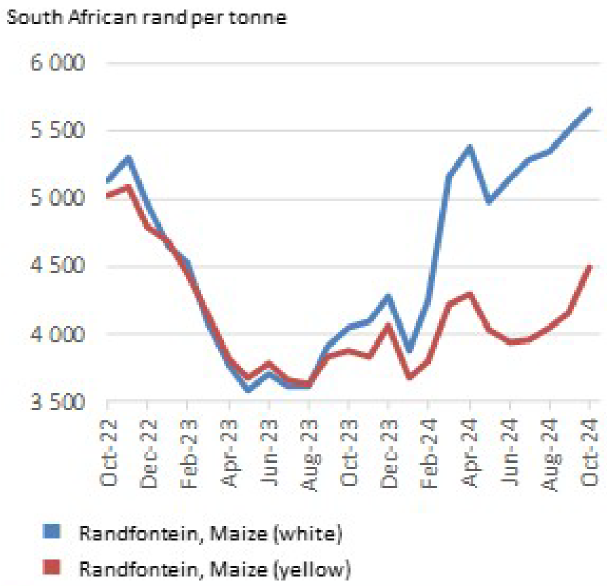
Wholesale prices of maize



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This brief was prepared using the following data/tools:
FAO/GIEWS Country Cereal Balance Sheet (CCBS) https://www.fao.org/giews/data-tools/en/.
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool https://fpma.fao.org/.
FAO/GIEWS Earth Observation for Crop Monitoring https://www.fao.org/giews/earthobservation/.
Integrated Food Security Phase Classification (IPC) https://www.ipcinfo.org/.