

Required Report: Required - Public Distribution

Date: March 21, 2025

Report Number: SF2025-0009

Report Name: Grain and Feed Annual

Country: South Africa - Republic of

Post: Pretoria

Report Category: Grain and Feed

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Report Highlights:

FAS/Pretoria's Grain and Feed annual report provides information on the production, supply, and distribution for corn, wheat, and rice in South Africa for marketing year (MY) 2023/24, MY 2024/25, and MY 2025/26. South Africa's overall agricultural outlook for MY 2025/26 is optimistic, with both corn and wheat production expected to see improvements on stable planting area. MY 2025/26 consumption for the major grains is expected to grow slightly, with a strong rebound for corn exports following an expected drop in MY 2024/25. However, the broader economic challenges facing South Africa, such as policy uncertainty, logistical infrastructure, and unemployment issues, remain a concern and could impact the long-term sustainability of consumption growth.

Contents

Executive Summary	3
CORN.....	4
Production	4
Consumption	8
Trade	11
Exports	11
Imports.....	12
Trade Barriers.....	12
Stocks	13
WHEAT	14
Production	14
Consumption	17
Trade	19
Imports.....	19
Exports	20
Wheat Import Duty.....	21
Stocks	22
RICE	23
Production	23
Consumption	23
Trade	25
Imports.....	25
Exports	25
Stocks	26

Executive Summary

- South Africa's corn and wheat planted area is forecast to remain stable in marketing year (MY¹) 2025/26, with a slight increase in production. Local demand for grains is under pressure due to South Africa's sluggish economy, limiting consumption growth.
- With higher carry-in stocks, above average production, and only minor consumption growth, South Africa's corn exports are expected to surge by almost a quarter in 2025/26.
- In MY 2024/25, South Africa's corn exports are expected to drop on a replenishment of year-end stocks from the abnormally low levels of MY 2023/24. In addition, better climatic condition in the region will lower regional demand for South Africa's corn in 2024/25.
- FAS/Pretoria forecasts MY 2025/26 wheat imports slightly higher than in MY 2024/25.
- In MY 2025/26, rice imports are expected to flatten as local and regional demand growth is limited.

¹ MY as used in the text refers to the USDA marketing years in the Production, Supply and Distribution (PS&D) tables, and does not necessarily correspond with the marketing years used by the South African grain industry.

CORN

Table 1: Corn Production, Supply and Distribution

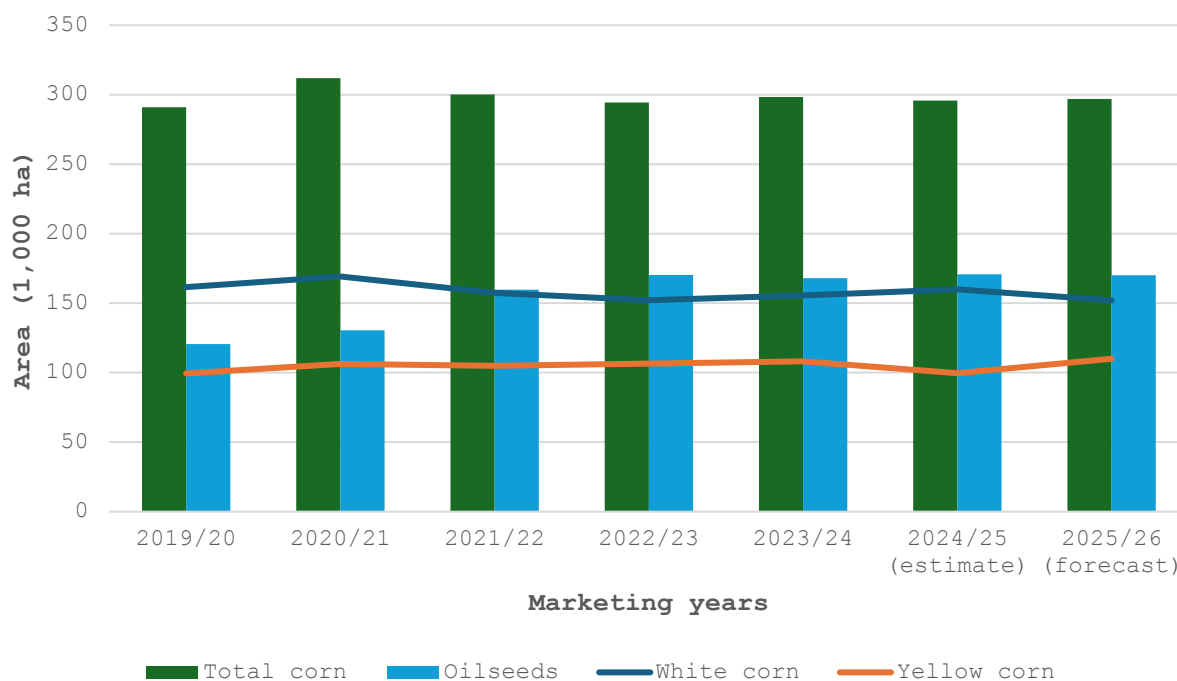
Corn Market Year Begins South Africa	2023/2024		2024/2025		2025/2026	
	May 2024		May 2025		May 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2983	2984	3000	2957	0	2970
Beginning Stocks (1000 MT)	2405	2405	830	820	0	1430
Production (1000 MT)	13425	13425	16000	15660	0	16000
MY Imports (1000 MT)	800	890	0	350	0	0
TY Imports (1000 MT)	254	254	550	725	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	16630	16720	16830	16830	0	17430
MY Exports (1000 MT)	2100	2200	1700	1500	0	1850
TY Exports (1000 MT)	2464	2464	2100	1900	0	2000
Feed and Residual (1000 MT)	6900	6900	6900	7000	0	7050
FSI Consumption (1000 MT)	6800	6800	6900	6900	0	7050
Total Consumption (1000 MT)	13700	13700	13800	13900	0	14100
Ending Stocks (1000 MT)	830	820	1330	1430	0	1480
Total Distribution (1000 MT)	16630	16720	16830	16830	0	17430
Yield (MT/HA)	4.5005	4.499	5.3333	5.2959	0	5.3872
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

FAS/Pretoria forecasts that South Africa's corn area will remain unchanged at 3 million hectares (Mha) in MY 2025/26 (May 2026 - April 2027). In recent years, South Africa's commercial corn area has remained consistently around 2.6 Mha, while non-commercial area is estimated at 350,000 ha. FAS/Pretoria expects oilseed area in South Africa to remain unchanged in MY 2025/26, limiting the availability of land for expansion of corn area (see Figure 1). Producers seem to have found an optimal balance between oilseed and corn areas in the current production environment. However, FAS/Pretoria forecasts a slight swing to more yellow corn plantings replacing white corn area on better global export potential for yellow corn. White corn exports are mostly limited to South Africa's neighboring countries.

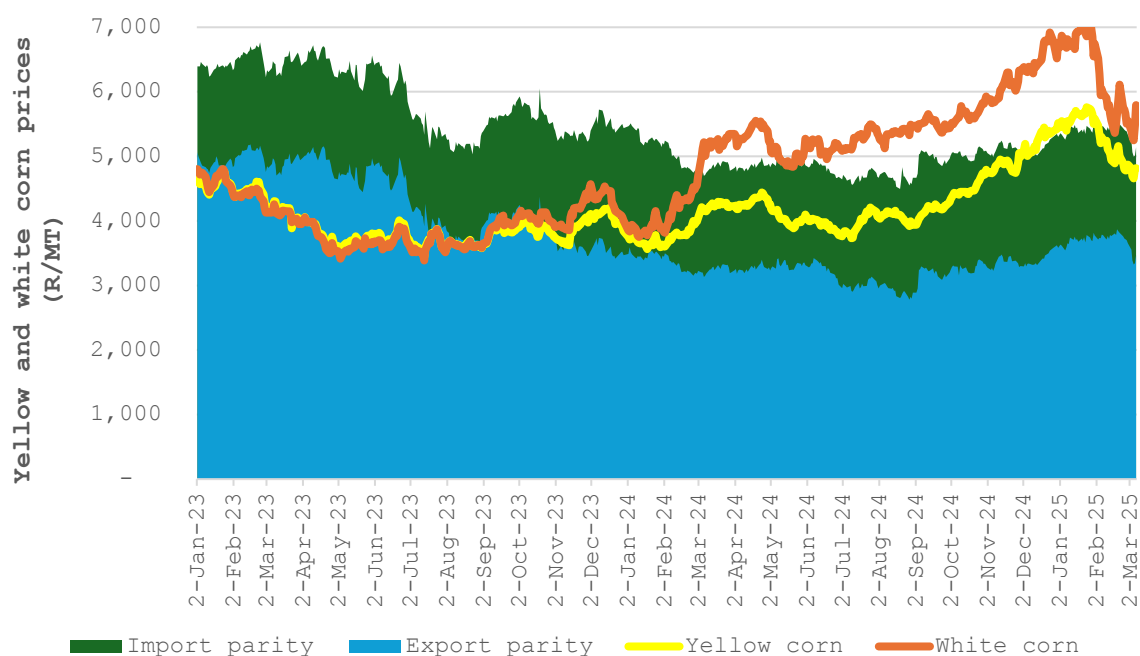
With a corn crop above 15 million metric tons (MMT) expected in MY 2024/25 (May 2025-April 2026), a bearish outlook on local corn prices should not trigger any major expansion in corn planting area later in 2025 for MY 2025/26. Local corn prices in February 2025 retreated from record levels at the beginning of the year when the uncertainty over crop condition drove prices higher (see Figure 2). As of March 2025, local corn prices are trading almost 20 percent lower than the record levels after timely rainfall in February increased production expectations.

Figure 1: Corn and Oilseed area in South Africa



Source: FAS/Pretoria using data from the South Africa Grain Information Services

Figure 2: Local Corn Price Trends since January 2023



Source: FAS/Pretoria using data from GrainSA

Assuming a 5-year average yield and normal weather conditions, South Africa's corn crop for MY 2025/26 could reach 16.0 MMT, which is two percent higher than the expected corn crop of 15.7 MMT in MY 2024/25. Table 2 details production figures for commercial and subsistence white corn and yellow corn for MY 2023/24 (actual), MY 2024/25 (estimate), and MY 2025/26 (forecast).

For MY 2024/25, FAS/Pretoria lowered the previous estimate for commercial planted corn area to 2.6 Mha to bring it in-line with the first 2025 summer crop forecast by the Crop Estimate Committee (CEC) (see [Crop Estimates](#)). As a result, FAS/Pretoria's estimated corn crop (including commercial and subsistence producers) is reduced marginally to 15.7 MMT.

South Africa's 2024/25 production season started off slowly with sporadic rainfall during October 2024 and a heatwave in November 2024, affecting the progress in corn plantings. However, in mid-December respectable and continued rainfall over most parts of South Africa's corn production areas finally started enabling producers to plant in earnest. After a dry and hot January, above-average rainfall was recorded in February over most parts of the summer rainfall production area, boosting plant growth and pushing up anticipated yields. Conducive production conditions, supported by sufficient rainfall, are expected for the rest of the season in most of South Africa's corn producing areas.

Table 2: Area Planted, Yield, and Production of Commercial and Subsistence Corn in South Africa

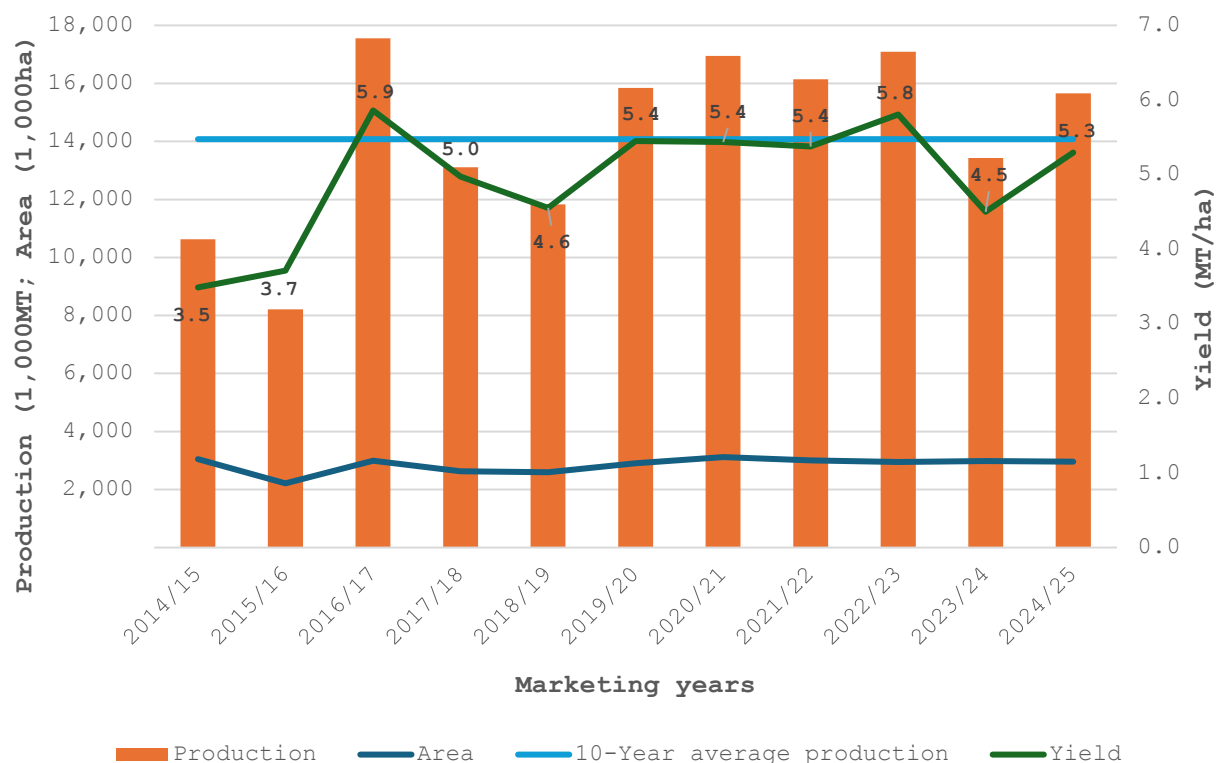
	2023/24 (actual)			2024/25 (estimate)			2025/26 (forecast)		
	Area (1,000ha)	Yield (MT/ Ha)	Prod. (1,000MT)	Area (1,000ha)	Yield (MT/ Ha)	Prod. (1,000MT)	Area (1,000ha)	Yield (MT/ Ha)	Prod. (1,000MT)
<u>Commercial Production</u>									
White	1,555	3.9	6,055	1,600	5.0	8,000	1,520	5.0	7,600
Yellow	1,082	6.2	6,795	997	7.0	7,000	1,100	7.0	7,750
Sub Total	2,637	4.9	12,850	2,597	5.8	15,000	2,620	5.9	15,350
<u>Subsistence Production</u>									
White	268	1.5	408	280	1.7	470	270	1.7	460
Yellow	79	2.1	167	80	2.4	190	80	2.4	190
Sub Total	347	1.7	575	360	1.8	660	350	1.9	650
TOTAL	2,984	4.5	13,425	2,957	5.3	15,660	2,970	5.4	16,000

Source: FAS/Pretoria estimates and data from the Crop Estimates Committee

In early March, FAS/Pretoria visited the major corn producing areas (see Map 1) of South Africa to interview industry analysts and assess crop conditions. In most areas, the corn crop appeared vigorous with high potential for an above average yield. Most of South Africa's corn is rainfed, with less than 20 percent under irrigation. Therefore, ample rainfall in February and March during the grain filling stage should improve yield potential. FAS/Pretoria expects an increase of 18 percent in the average national corn yield (commercial and subsistence production) to 5.3 metric tons per hectare (MT/ha) in MY 2024/25, raising corn production above the 10-year average for South Africa (see Figure 3).

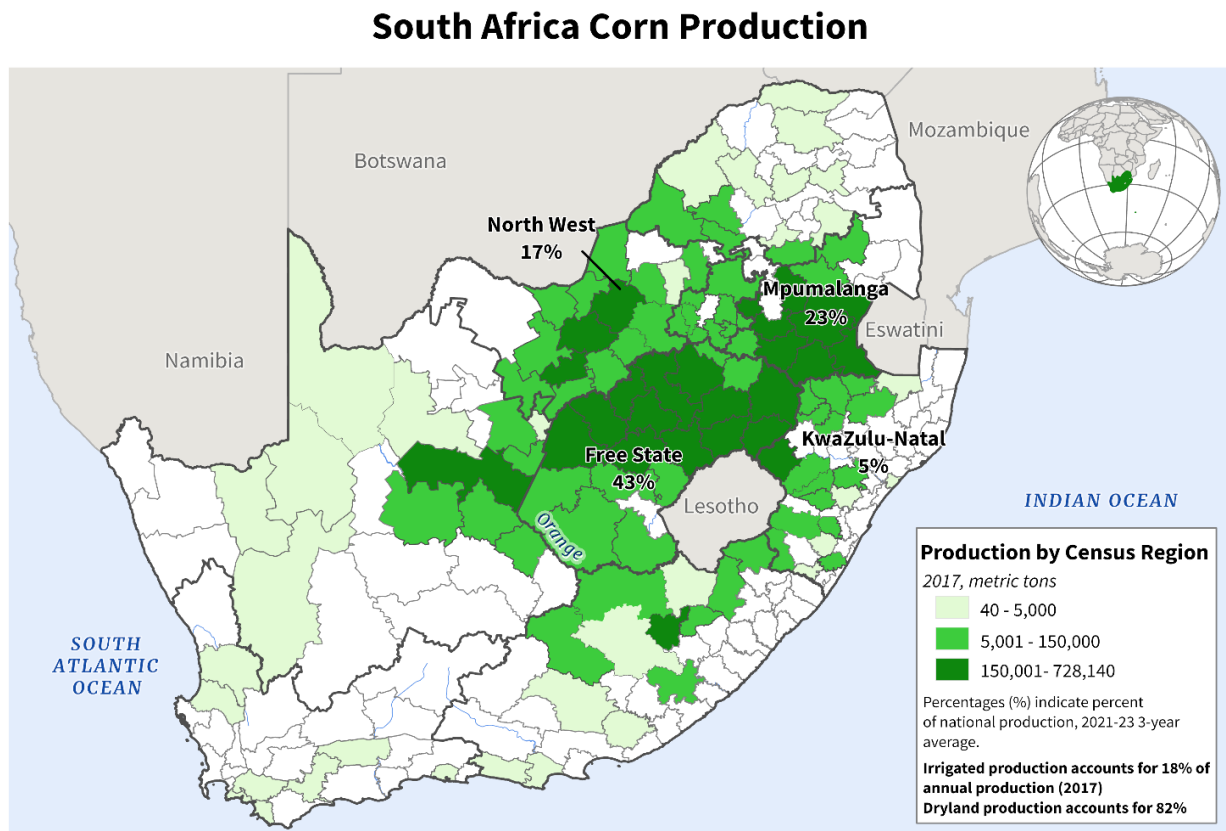
On February 13, 2025, the CEC finalized South Africa's commercial corn crop for MY 2023/24 at 12.9 MMT, after total producer deliveries for the marketing year and on-farm usage were considered. This means that South Africa's total corn crop for MY 2023/24, which includes both commercial and subsistence producers, dropped by 21 percent to 13.4 MMT at a national average yield of 4.5 MT/ha. This represents the smallest corn crop in 5 years after the yields were reduced by an *El Niño* induced mid-summer drought in 2024 coupled with excessive heat across South Africa during the crucial vegetative and flowering stages for corn.

Figure 3: Area Planted, Production and Yields of Corn in South Africa over the Past 10 years



Source: United States Department of Agriculture

Map 1: South Africa's Corn Production Areas



USDA Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE

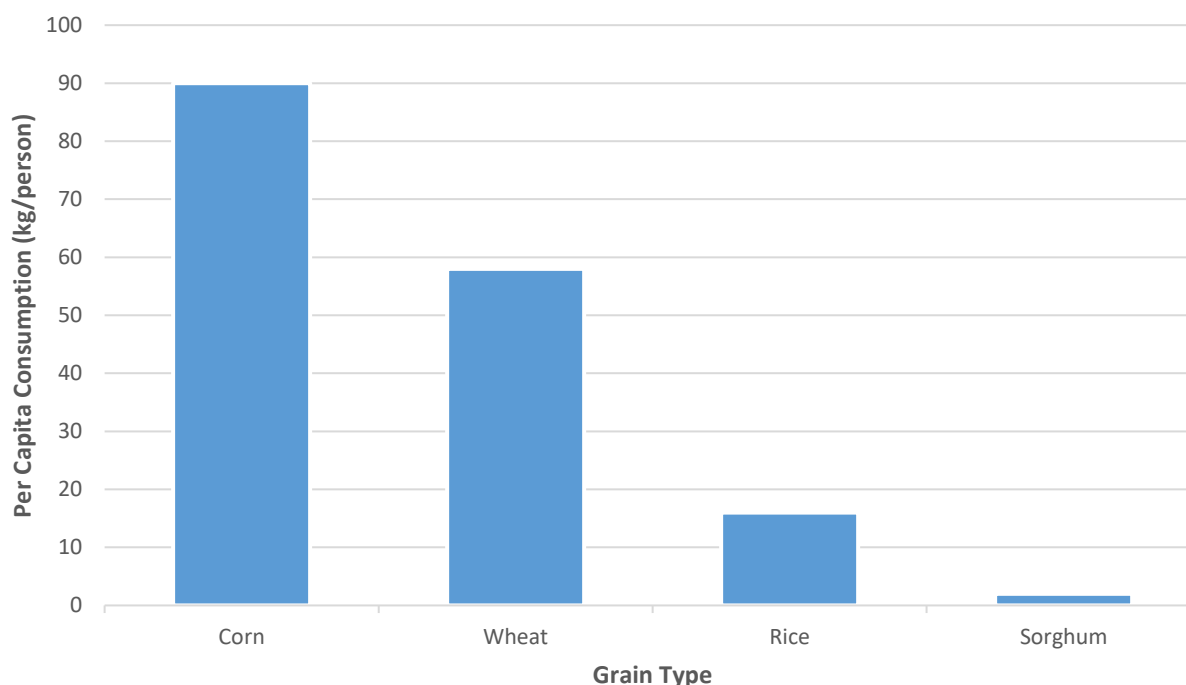
Source: South Africa Crop Estimates Committee, Department of Agriculture, Land Reform, and Rural Development, 2023.
South Africa 2017 Census of Commercial Agriculture.

Maps and data on production are available in USDA/FAS's [Crop Explorer](#)

Consumption

South Africa consumes both white and yellow corn. White corn, in the form of a meal (called mielie/mealie or maize meal in South Africa), is the most important grain for human consumption as it is a relatively inexpensive source of carbohydrates. Annual per capita consumption of corn is the highest among grains at 90 kilograms (kg) per person, followed by wheat (58kg/person), and rice (16kg/person) (see Figure 4). The bulk of yellow corn is destined for the animal feed sector as the primary ingredient of most feed rations, particularly in the broiler industry. The broiler industry is South Africa's largest individual agricultural industry, representing 40 percent of total feed sales, totaling more than 5 MMT. While white corn can also be used as animal feed depending on availability and price levels compared to yellow corn, yellow corn is not considered culturally acceptable for human consumption.

Figure 4: *South Africa's Annual Per Capita Consumption of the Major Grains*

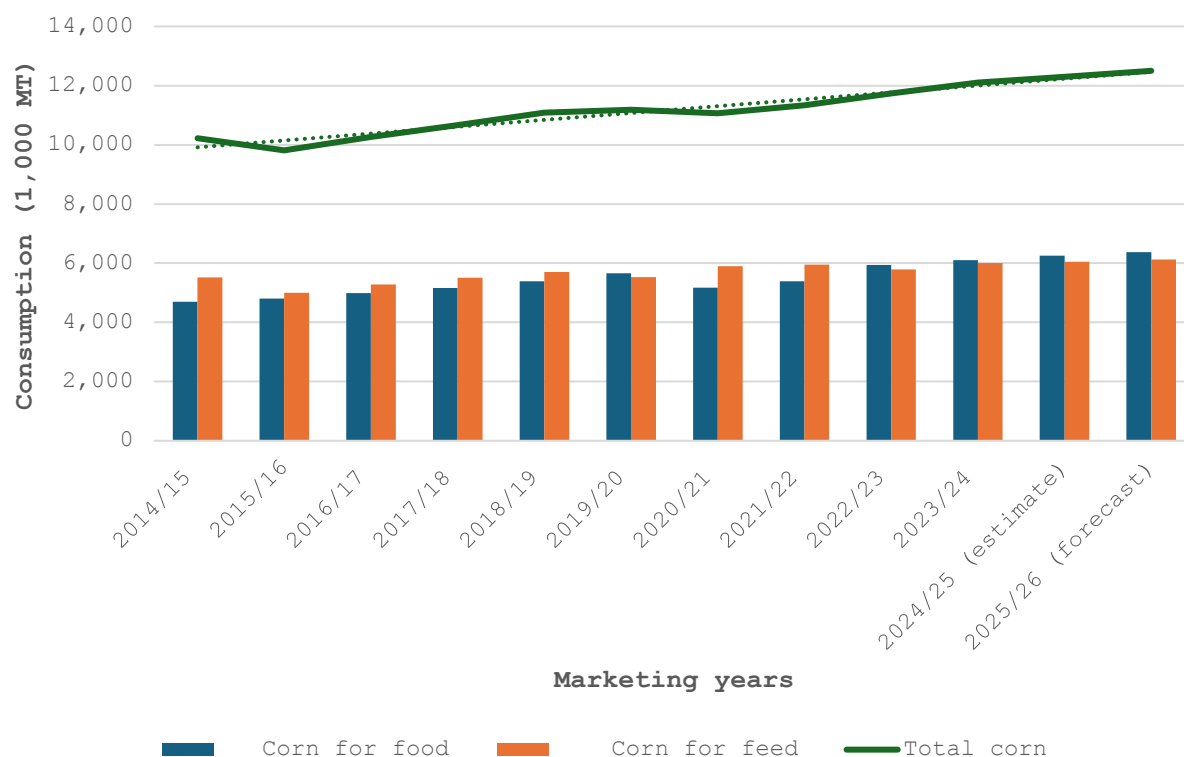


Source: Data from the [Production, Supply and Distribution](#) database of the United States Department of Agriculture

Over the past 10 years, South Africa maintained an average corn consumption growth rate of about two percent annually (refer to Figure 5), driven by population growth and a continuous immigration of people into South Africa, especially from other southern Africa countries. Economic growth and disposable income also play a role in the consumption rate of corn. In a constrained consumer spending environment, the consumption of basic staples such as white corn meal will continue to grow while meat consumption will be under pressure, restricting demand growth for feed corn.

South Africa's economic growth outlook over the medium term continues to be limited. The country's Gross Domestic Product (GDP) grew by a dismal 0.6 percent in 2024 and is expected to expand by less than 2 percent in 2025 and 2026. Furthermore, South Africa's unemployment rate remains high at about 32 percent. The reasons for South Africa low economic growth include frequent electricity supply shortages, policy uncertainty, logistical infrastructure challenges, and a declining investment climate, all of which significantly hinder economic growth and development. Therefore, FAS/Pretoria expects the gradual growth of corn consumption in South Africa will continue with the trend line in MY 2024/25 and MY 2025/26, driven mainly by steady growth in the human consumption of corn.

Figure 5: Corn Consumption in South Africa



Source: FAS/Pretoria using data from the South Africa Grain Information Services

Table 3 outlines the commercial consumption of white and yellow corn in South Africa for MY 2023/24 (estimate), MY 2024/25 (estimate), and MY 2025/26 (forecast).

Please note consumption figures in the Production, Supply, and Distribution (PS&D) table (Table 1) also include on-farm usage and corn utilized by the subsistence farming sector.

Table 3: Commercial Consumption of White and Yellow Corn in South Africa

CORN (1,000 MT)	White	Yellow	Total	White	Yellow	Total	White	Yellow	Total
MY	2023/24			2024/25			2025/26		
Human	5,500	600	6,100	5,650	600	6,250	5,725	650	6,375
Animal	100	5,900	6,000	500	5,550	6,050	125	6,000	6,125
Other	50	50	100	50	50	100	50	50	100
TOTAL	5,650	6,550	12,200	6,200	6,200	12,400	5,900	6,700	12,600

Source: FAS/Pretoria using data from the South Africa Grain Information Services

Trade

Exports

FAS/Pretoria forecasts South Africa corn exports in MY 2025/26 to grow by almost a quarter to 1.9 MMT on an expected commercial crop of above 15.0 MMT. South Africa's corn exports for MY 2024/25 are expected to drop to 1.5 MMT on a replenishment of year-end stocks from the abnormally low levels of MY 2023/24. Year-end stock levels are expected to expand by 75 percent to 1.4 MMT. In addition, better climatic condition in the region, especially in Zimbabwe, will lower regional demand for South Africa's corn exports.

South Africa is expected to export about 2.2 MMT of corn in MY 2023/24. South Africa's corn exports focus mainly on neighboring countries where import demand is elevated after last year's drought-stricken season. With 10 months of MY 2023/24 already past, South Africa has exported almost 2.0 MMT of corn, including 1.3 MMT of white corn and 687,000 MT of yellow corn (see Table 4). For the rest of MY 2023/24, FAS/Pretoria expects corn exports to continue at the current rate to neighboring countries until the start of the next corn harvest in May 2025.

Note on Marketing Year vs. Trade Year (TY) Trade forecasts:

TY 2024/25 runs from October 2024 to September 2025, while MY2024/25 is from May 2025 to April 2026. A large part of TY 2024/25 exports is from the prior year crop, while MY 2024/25 exports will be from the crop currently in the fields. Most white corn exports are to South Africa's neighbors and there is a consistent monthly flow of corn without major seasonal variation. For yellow corn, the market is mostly Asia, and exports will be higher around harvest time (June/July) and then start to flatten off to October/November when the Northern hemisphere starts harvesting. Thus, TY 2024/25 exports include current year exports (Oct 2024 – April 2025), regular white corn exports (May 2025 – Sept 2025), and the possible spike in yellow corn exports during harvest time (Jun 2025 – Jul 2025). MY 2024/25 exports will include regular white corn exports (May 2025 – Apr 2026) and the possible spike in yellow corn exports during harvest time (Jun 2025 – Jul 2025). However, South Africa's corn exports for MY 2024/25 are expected to drop on a replenishment of year-end stocks. Hence the expected higher TY 2024/25 exports compared to MY 2024/25 exports.

Table 4: South Africa's Corn Exports in MY 2023/24

MY 2023/24			
First 10 Months			
(May 1, 2024, to February 28, 2025)			
Countries	White corn	Yellow corn	Total
	(1,000 MT)		
Zimbabwe	741	391	1,132
Botswana	167	89	256
Namibia	185	54	239
Mozambique	81	66	147
Eswatini	46	77	123
Lesotho	75	5	80
Saudi Arabia	0	4	4
Zambia	0	1	1
TOTAL EXPORTS	1,295	687	1,982

Source: FAS/Pretoria using data from the South Africa Grain Information Services

Imports

FAS/Pretoria does not forecast any corn imports for South Africa in MY 2025/26 on expected higher production and domestic supply. For MY 2024/25, FAS/Pretoria estimates a substantial drop in corn imports to 350,000 MT, falling from unusually high levels in 2023/24. With harvest starting in May and domestic yellow corn prices trading below import parity price levels, corn imports should slow down in the early parts of MY 2024/25, but yellow corn imports could pick-up again by the end of 2025 as stocks tighten.

In MY 2023/24, South Africa has already imported 726,000 MT of corn, including 65,000 MT of white corn from the United States (see Table 5). South Africa's corn imports are expected to reach 890,000 MT in MY 2023/24 following a poor harvest, which could include an expected 135,000 MT from the United States.

Trade Barriers

Although South Africa's corn import duties are set at zero, asynchronous genetically engineered (GE) approvals pose a significant risk to trade since South Africa applies zero tolerance for unintentional presence of GE events in food and feed imports. South Africa is among the top 10 global producers of GE crops and has approved numerous GE corn events for commercial cultivation. However, the list of GE corn events cultivated in an exporting country must be synchronized with events that have been approved by the South African regulators for food and feed purposes. FAS/Pretoria worked closely with stakeholders to resolve asynchronous GE events approvals between South Africa and the United States and received confirmation in November 2024 that U.S. GE corn had been approved for imports into South Africa (see also [Market Opens for United States Corn](#)).

Table 5: South Africa's Imports of Corn in MY 2023/24

MY 2023/24 First 10 Months (May 1, 2024, to February 28, 2025)			
Countries	White corn	Yellow corn	Total
	(1,000 MT)		
Argentina	0	556	556
Brazil	0	105	105
United States	56	9	65
TOTAL IMPORTS	56	670	726

Source: FAS/Pretoria using data from the South Africa Grain Information Services

Stocks

Year-end stocks are forecast to stabilize in MY 2025/26 at 1.5 MMT, covering about six weeks of commercial utilization. In MY 2024/25, corn stocks are expected to recover from the abnormally low levels estimated for MY 2023/24, expanding by 75 percent to 1.4 MMT on higher local production and less exports. In MY 2023/24, stock levels are expected to drop by 66 percent to 820,000 MT, the lowest level in 10 years, due to a decline in local production and greater export demand in the region.

South Africa's storage capacity for grain and oilseeds exceeds 20 MMT and stocks are primarily stored by producer-owned agribusinesses (formerly cooperatives), traders, and processors. Unlike many other countries in southern Africa, there is minimal interference by the South African government in the local corn market. As a result, the South African government refrains from holding any corn stocks or mandating specific stock levels through regulations.

WHEAT

Table 6: Wheat Production, Supply and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	538	538	505	505	0	500
Beginning Stocks (1000 MT)	526	526	549	789	0	654
Production (1000 MT)	2050	2050	1925	1925	0	2000
MY Imports (1000 MT)	1928	2128	1900	1900	0	2000
TY Imports (1000 MT)	2011	2181	1900	1900	0	2000
TY Imp. from U.S. (1000 MT)	12	24	0	0	0	0
Total Supply (1000 MT)	4504	4704	4374	4614	0	4654
MY Exports (1000 MT)	235	250	250	250	0	250
TY Exports (1000 MT)	234	235	250	250	0	250
Feed and Residual (1000 MT)	20	10	25	10	0	10
FSI Consumption (1000 MT)	3700	3655	3700	3700	0	3745
Total Consumption (1000 MT)	3720	3665	3725	3710	0	3755
Ending Stocks (1000 MT)	549	789	399	654	0	649
Total Distribution (1000 MT)	4504	4704	4374	4614	0	4654
Yield (MT/HA)	3.8104	3.8104	3.8119	3.8119	0	4

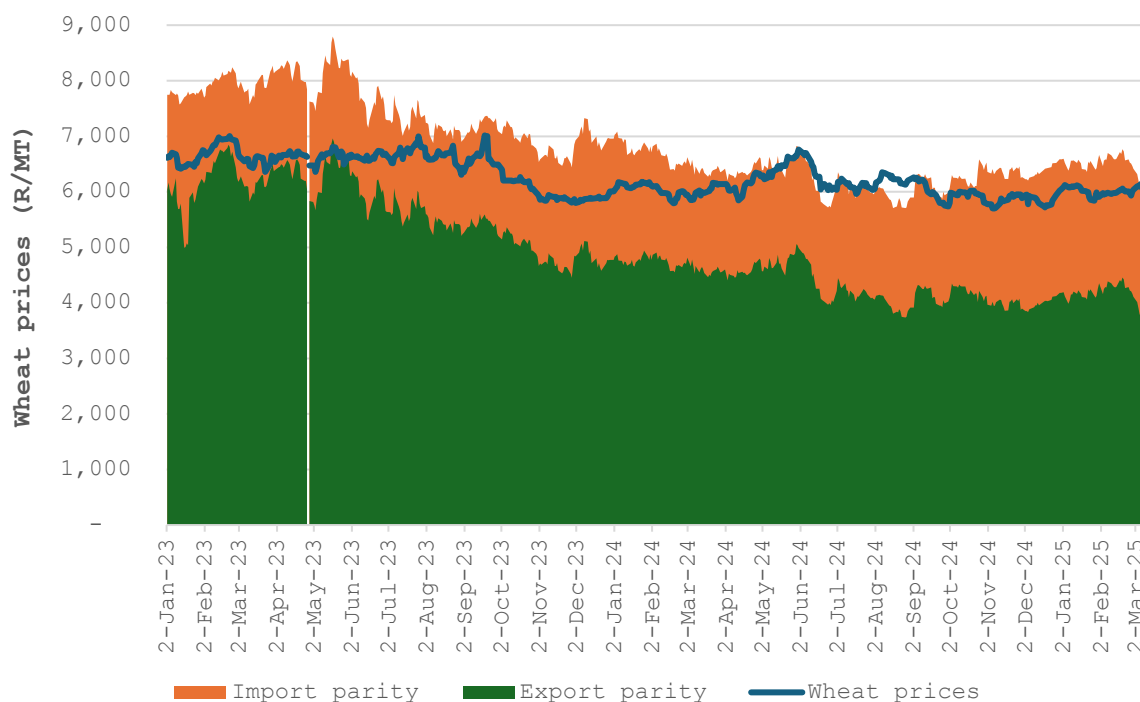
(1000 HA) ,(1000 MT) ,(MT/HA)
 MY = Marketing Year, begins with the month listed at the top of each column
 TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Production

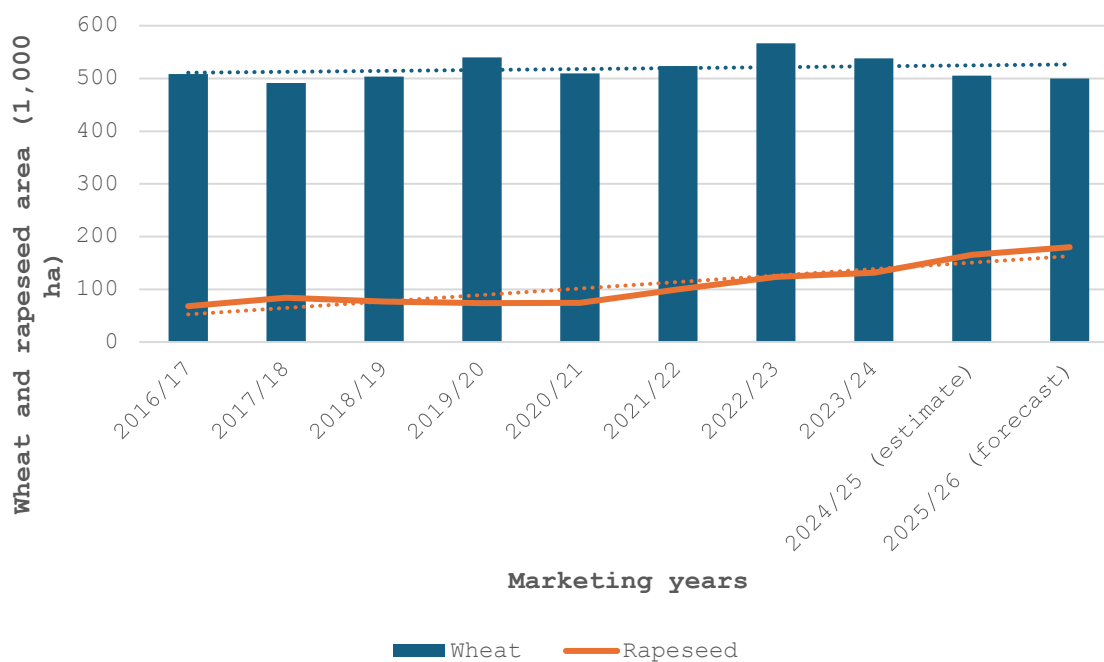
FAS/Pretoria forecasts that South Africa's wheat area will remain unchanged at 500,000 ha in MY 2025/26 (October 2025 – September 2026). Local wheat prices have been relatively stable over the past year with a growth rate of less than 3 percent, minimizing incentives for producers to expand wheat area (see Figure 6). In addition, wheat area competes with an upsurge in rapeseed production in the winter rainfall areas of South Africa, limiting the availability for land for expansion (see Figure 7).

Figure 6: Local Wheat Price Trend since January 2023



Source: FAS/Pretoria using data from GrainSA

Figure 7: Area Planted with Wheat and Rapeseed in South Africa

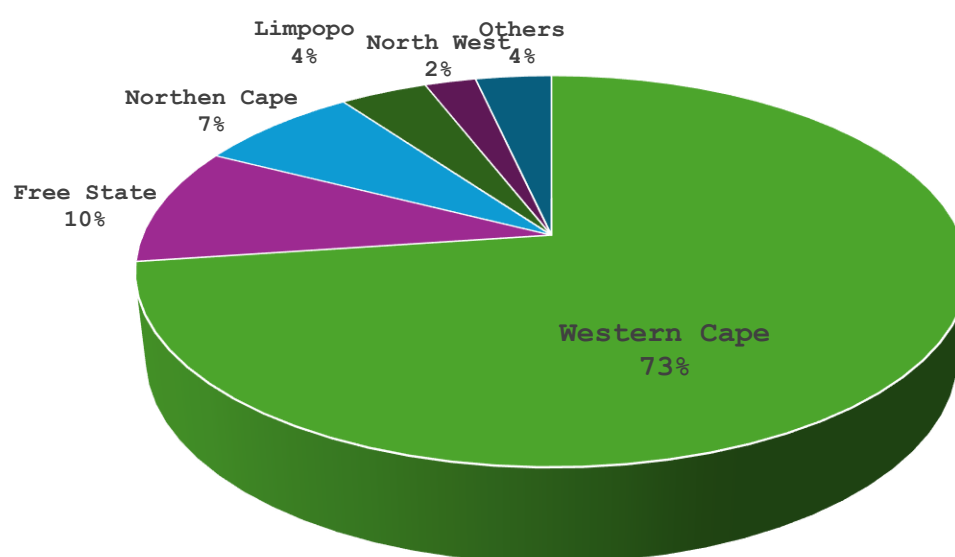


Source: FAS/Pretoria using data from the South Africa Grain Information Services

More than 70 percent of wheat in South Africa is planted under rain-fed conditions in the Western Cape province, a winter rainfall area (see Figure 8). The Western Cape province also accounts for most of South Africa's rapeseed production and both crops are produced during the winter months (May to August). Rapeseed production started in South Africa in the late 1990s after the opening of a rapeseed oil refinery in the Western Cape province. The opening of the processing facilities supplied farmers with a new market opportunity. The area under rapeseed more than doubled over the past 10 years to the current record level. Constant yield growth from new cultivars combined with firm crush demand is supporting the expansion in rapeseed area.

In the summer rainfall areas of South Africa, wheat planted area is continuously declining as dryland wheat production is no longer viable due to lower profitability compared to other crops like corn and soybeans. Yield improvements in wheat lag growth in corn and soybeans yields, which are driven by biotechnology. An expansion of wheat planting under irrigation, mainly in the Northern Cape and Limpopo provinces, is also unlikely due to South Africa's continuous power outages, known as loadshedding locally.

Figure 8: *The Distribution of Wheat Area by Provinces in South Africa*



Source: FAS/Pretoria using data from the Department of Agriculture, Land Reform and Rural Development

With an area of 500,000 ha and a 5-year average yield of 4.0 MT/ha, South Africa could realize a wheat crop of 2.0 MMT in MY 2025/26, narrowly exceeding the wheat crop of 1.9 MMT produced in MY 2024/25 (October 2024 – September 2025). South Africa's largest wheat crop of 3.6 MMT was produced more than 35 years ago in MY 1988/89, but on 2 Mha. Table 7 reflects the area planted, yield, and production figures of wheat in South Africa for MY 2023/24 (actual), MY 2024/25 (estimate), and MY 2025/26 (forecast).

Table 7: Area Planted and Production of Wheat in South Africa

MY	Area (1,000 ha)	Yield (MT/ha)	Production (1,000 MT)
2023/24 (actual)	538	3.8	2,050
2024/25 (estimate)	505	3.8	1,925
2025/26 (forecast)	500	4.0	2,000

Source: FAS/Pretoria estimates and data from the Crop Estimates Committee

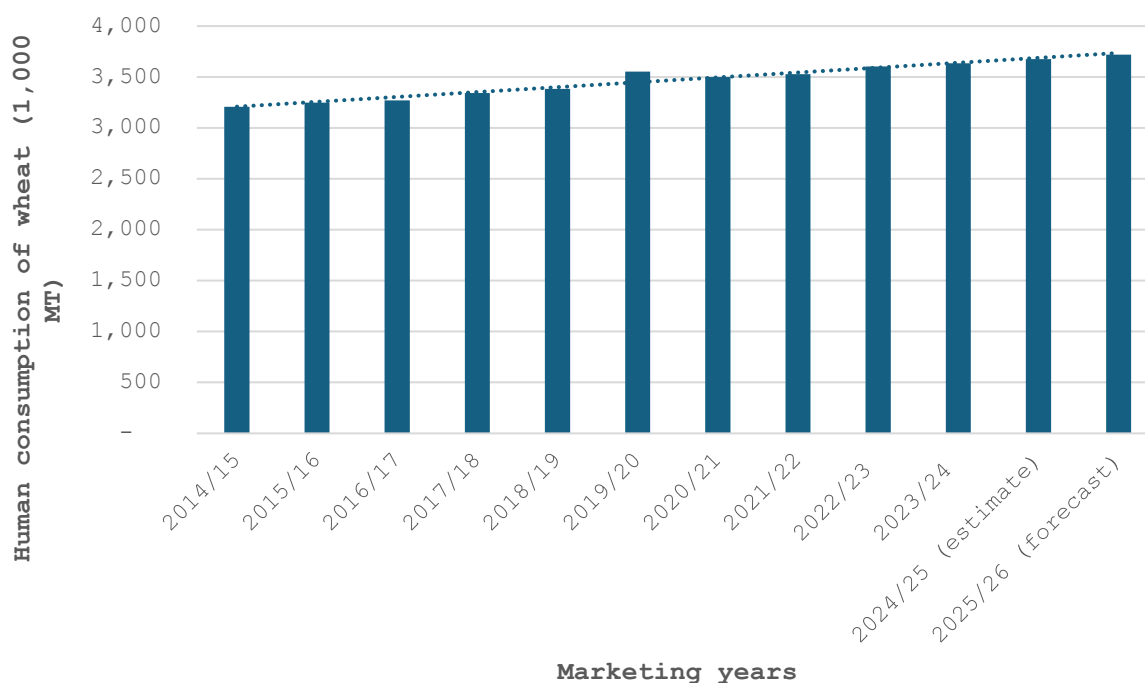
On February 27, 2024, the CEC released the final estimate for MY 2024/25's wheat crop. The CEC estimated the wheat crop at 1.9 MMT, a 6 percent drop from the previous marketing year, exclusively due to a reduction in harvested area. The average yield of 3.8 MT/ha was unchanged from the previous year, equaling the third highest on record and reflecting favorable weather conditions throughout the production areas, particularly in the Western Cape province. As already noted, wheat is largely produced in the winter rainfall area of South Africa (i.e. the Western Cape province), under rainfed conditions. Therefore, weather in this province during the wheat production season plays a significant role in South Africa's total wheat crop. The production season in the Western Cape province started off with below normal rainfall in May and June. However, the dry period was followed by excessive rainfall in July that caused flooding in some areas, which damaged infrastructure but had minimal impact on the newly planted wheat crop. The conducive weather conditions continued for the rest of the season, resulting in substantial average yields.

Consumption

Wheat is mostly used for human consumption in South Africa and is the second most important grain commodity after corn (also see Figure 4), with consumption rising gradually over time. South Africa consumes around 2.4 billion loaves of bread annually, or almost 40 loaves of bread per person per year. As economic growth continues to be sluggish, population growth is the main driver of wheat consumption. As a result, local wheat consumption rose by approximately one percent annually over the past 10 years (see Figure 9).

FAS/Pretoria expects this growth trend to continue in MY 2025/26, with local wheat consumption rising slightly to 3.8 MMT. FAS/Pretoria estimates wheat consumption in MY 2024/25 at 3.7 MMT, slightly higher than in MY 2023/24. South Africa's economic growth outlook over the medium term continues to be lackluster, which will hinder any major wheat demand increases in the short-term (also refer to the corn commodity consumption section for more details on South Africa's GDP growth). In Table 8, the consumption of wheat in South Africa is shown for MY 2023/24 (actual), MY 2024/25 (estimate), and MY 2025/26 (forecast).

Figure 9: Trends in Human Consumption of Wheat in South Africa



Source: FAS/Pretoria using data from the South Africa Grain Information Services and Trade Data Monitor, LLC

Table 8: Consumption of Wheat in South Africa

Wheat (1,000 MT)					
Marketing year	Human ¹	Animal	Seed	Other	TOTAL
2023/24 (actual)	3,634	7	20	4	3,665
2024/25 (estimate)	3,675	10	20	5	3,710
2025/26 (forecast)	3,720	10	20	5	3,755

Sources: FAS/Pretoria using data from the South Africa Grain Information Services and Trade Data Monitor, LLC

Note: 1. Human consumption figures include local manufactured wheat products as well as imported products like wheat flour, uncooked pasta, and couscous.

Trade

Imports

FAS/Pretoria forecasts MY 2025/26 wheat and wheat products imports at 2 MMT, 5 percent higher than in MY 2024/25. A slight increase in production is offset by a rise in consumption, while wheat exports (minimal in South Africa) are expected to flatten.

Despite lower production, wheat and wheat products imports are expected to drop in MY 2024/25 by 11 percent to 1.9 MMT, due to relatively large carry-over stocks, while minor growth in local consumption and stable exports is estimated. According to the South African Grain Information Services, South Africa imported 705,000 MT of wheat in the first five months of MY 2024/25 (October 2024 – February 2025), down 7 percent from the same period the prior year. Russia, Lithuania, and Latvia are the major suppliers of wheat to South Africa so far in MY2024/25 (see also Table 9).

In MY 2023/24, South Africa's wheat and wheat products imports grew by 16 percent to 2.1 MMT. South Africa imported 1.9 MMT of wheat and 201,000 MT (wheat equivalent) of wheat products in MY 2023/24. Russia, Lithuania, Australia, and Poland were the major suppliers of wheat to South Africa. U.S. wheat exports to South Africa grew by 76 percent to almost 33,000 MT in MY 2023/24.

Note on Trade Data Sources

For wheat imports, FAS/Pretoria uses the South African Grain Information Services (SAGIS) data for grain imports and Trade Data Monitor (TDM) for wheat products imports. SAGIS data does not include wheat product imports. For exports, FAS/Pretoria uses SAGIS data for both grain and wheat products as SAGIS provides both.

Table 9: South Africa's Imports of Wheat by Country

MY 2023/24 Full year (Oct 1, 2023 – Sept 30, 2024) (1,000 MT)		MY 2024/25 5 months (Oct 1, 2024 – Febr 28, 2025) (1,000 MT)	
<u>Sources of Imports</u>		<u>Sources of Imports</u>	
Russia	544	Russia	369
Lithuania	408	Lithuania	108
Australia	390	Latvia	84
Poland	374	Canada	54
Latvia	138	Romania	45
United States	33	Poland	41
Estonia	32	Australia	4
Canada	4		
Argentina	4		
TOTAL IMPORTS	1,927¹		705

Source: FAS/Pretoria using data from the South Africa Grain Information Services

Notes: 1. Trade figures in the PS&D table include the trade in wheat flour and other wheat products like uncooked pasta and couscous.

Exports

South Africa exports wheat to nearby countries in the region and acts as a regional conduit for grain imported from outside the region (also refer to Table 10). Wheat exports to the region are anticipated to flatten in MY 2025/26 and MY 2024/25 at 250,000 MT on higher regional grain production. Climatic conditions are more favorable than the El Niño-induced drought of 2024, boosting grain production in the region and limiting demand for imported wheat.

According to the South African Grain Information Services, South Africa exported 215,000 MT of wheat and 35,000 MT (wheat equivalent) of wheat products in MY 2023/24, down 14 percent from the previous marketing year. Wheat exports were mainly to neighboring Zambia, Zimbabwe, and Botswana.

Table 10: South Africa's Exports of Wheat by Country

MY 2023/24 Full year (Oct 1, 2023 – Sept 30, 2024) (1,000 MT)		MY 2024/25 5 months (Oct 1, 2024 – Feb 28, 2025) (1,000 MT)	
<u>Export Destinations</u>		<u>Export Destinations</u>	
Zambia	66	Zimbabwe	35
Zimbabwe	63	Botswana	11
Botswana	41	Lesotho	6
Lesotho	33	Zambia	6
Namibia	11	Namibia	3
Congo	1		
TOTAL EXPORTS	215¹		61

Source: FAS/Pretoria using data from the South Africa Grain Information Services

Notes: 1. Trade figures in the PS&D table include the trade in wheat flour and other wheat products like uncooked pasta and couscous.

Wheat Import Duty

On October 25, 2024, South Africa published a new wheat import duty of R422.00/MT (\$22.97/MT²) due to falling global wheat prices (see Table 11). South African wheat imports had entered duty-free since July 2, 2021, but the duty was raised to R176.30 (\$9.60/MT) in July 2024 and again in October 2024. Although the new duty was published in October 2024, it was already triggered in the beginning of July 2024 due to falling global prices. As the world wheat price continued to decline beyond July 2024, another duty adjustment to R549.45/MT (\$29.90/MT) was triggered on December 3, 2024. It remains unclear when this new duty will be published, as the reaction days to implement a new duty depend on the time it takes to conclude the administrative process.

The South African wheat duty is calculated using a variable formula to ensure stable wheat prices and is intended as a buffer against extreme market fluctuations. Consequently, local wheat prices are shielded by higher duties when the international prices are declining to support local producers, and duties are lowered to support local consumers when international wheat prices are rising. Adjustments are triggered when the average price of wheat deviates by more than \$10/MT in either direction from the price used for the last duty calculation and persists for three consecutive weeks. The formula uses United States Hard Red Wheat No 2 as a reference price,

² \$1 = R18.37 (3/16/2025)

plus adjustments for distortion factors (subsidies) in the global wheat market and subtraction of the average freight costs to South African ports.

Although the import tariff for wheat from the European Union (EU) and United Kingdom (UK) is also set at R422/MT, the Economic Partnership Agreement (EPA) makes provision for duty-free imports. The EPA between the Southern Africa Custom Union and the EU and UK allows for duty-free imports of 300,000 MT of wheat annually. In addition, there is an annual quota of 108,279 MT of wheat available for all countries that can enter South Africa at full duty less 14.4 percent.

Table 11: South Africa's Import Duties for Wheat and Wheat Products as of 02/27/2025

Products (HS Code)	General (including the United States)	European Union/ United Kingdom	European Free Trade Association (EFTA)	Southern Africa Development Community (SADC)	Mercosur
Per MT					
Durum wheat (10011)	Free	Free	Free	Free	Free
Wheat grain (10019)	R422.00	R422.00	R422.00	Free	R422.00
Wheat flour (1101)	R632.90	R632.90	R632.90	Free	R632.90
Uncooked pasta (190219)	40%	Free	Free	Free	40%
Other pasta (190230)	20%	Free	Free	Free	20%
Couscous (190240)	20%	Free	Free	Free	20%
Bulgar wheat (190430)	20%	Free	Free	Free	20%

Source: FAS/Pretoria using data from the South African Revenue Services (SARS)

Stocks

Ending stocks will be stable at above 600,000 MMT in MY 2025/26 and MY 2024/25, equaling about two months of commercial processing. Wheat stocks in MY 2023/24 ended relatively high at 790,000 MT on larger imports. Stocks are primarily stored by producer-owned agribusinesses (formerly cooperatives), traders, and processors. The South African government does not hold any wheat stocks or mandate specific stock levels through regulations.

RICE

Table 12: Rice Production, Supply and Distribution

Rice, Milled Market Year Begins South Africa	2023/2024		2024/2025		2025/2026	
	May 2023		May 2024		May 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	65	65	70	74	0	74
Milled Production (1000 MT)	0	0	0	0	0	0
Rough Production (1000 MT)	0	0	0	0	0	0
Milling Rate (.9999) (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	1139	1139	1150	1150	0	1165
TY Imports (1000 MT)	1075	1075	1150	1150	0	1160
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1204	1204	1220	1224	0	1239
MY Exports (1000 MT)	158	155	150	160	0	165
TY Exports (1000 MT)	149	149	150	0	0	0
Consumption and Residual (1000 MT)	976	975	990	990	0	1000
Ending Stocks (1000 MT)	70	74	80	74	0	74
Total Distribution (1000 MT)	1204	1204	1220	1224	0	1239
Yield (Rough) (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

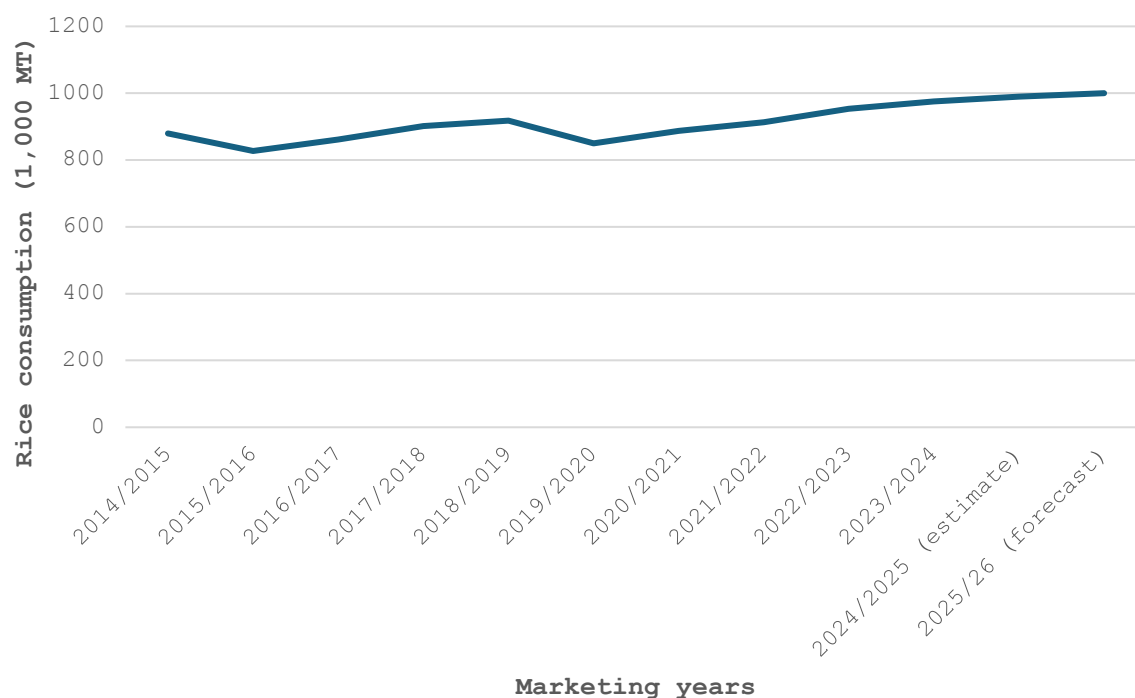
Production

South Africa's climate is not suitable for large-scale rice cultivation, forcing the country to rely almost entirely on imports to meet local demand. Corn, wheat, soybeans, and sunflower all have a long history of production in South Africa, with development of cultivars better adapted to the local climate. Rice cultivation was never part of these developments due to the high-water requirements of the crop in a relatively water-scarce country.

Consumption

FAS/Pretoria forecasts that the slow and steady growth of rice demand in South Africa will continue in MY 2024/25 (May 2024 – May 2025) and MY 2025/26 (May 2025 – May 2026). Over the past 10 years, rice demand in South Africa grew on average just above one percent annually in line with population growth (see also Figure 10). In addition, South Africa's economic growth outlook over the medium term continues to be low, reducing the upside for any consumption growth (also refer to the corn commodity consumption section for more details on South Africa's GDP growth).

Figure 10: Trends in the Consumption of Rice in South Africa



Source: Data from the [Production, Supply and Distribution](#) database of the United States Department of Agriculture

Corn, in the form of meal, wheat products, and rice are the three major grains for human consumption in South Africa. The annual per capita consumption of corn is the highest, followed by wheat and then rice (also refer to Figure 4). However, rice is the predominant carbohydrate source in some South African households, particularly among the local Indian and Asian populations of almost 2 million. Over 90 percent of the rice consumed in South Africa is parboiled, with the remainder consisting of specialty rice.

South Africa's domestic rice market is dominated by two established and strong brands, which together hold about half of the market share. These brands focus on the top-end of the market and prefer the quality of Thai rice. Thailand's parboiled rice is generally considered to be higher quality, relative to India and other origins, due to superior aroma and taste, mainly attributed to the Jasmine rice variety.

The lower end of the market is driven mostly by price, with Indian rice fitting this segment. India's parboiled rice generally emphasizes quantity and affordability. Many medium and small companies operate in this market, engaging in the importing, packing, and distribution of rice. The low-end of the South Africa's rice market also competes with white corn flour, which, as already mentioned, is the preferred carbohydrate food source for the majority of South Africans.

Trade

Imports

In MY 2025/26, South Africa's rice imports are expected to grow slightly to 1.17 MMT in line with local demand. South Africa's rice imports are dominated by Thailand, followed by India. Together, rice imports from Thailand and India supply 95 percent of the South African market. Import duties for all types of rice into South Africa are zero, and South Africa sources all rice via imports.

In the first nine months of MY 2024/25 (May 2024 to January 2025), South Africa imported 863,000 MT of rice, which is marginally lower compared to the same period of MY 2023/24 (see also Table 13). FAS/Pretoria estimates imports could reach 1.15 MMT by the end of MY 2024/25, representing a growth rate of one percent, in line with local demand growth.

Table 13: *South Africa Imports of Rice (milled rice equivalent)*

	MY 2023/24 <i>Full year</i> (May 1, 2023 – Apr 30, 2024) (1,000 MT)	MY 2024/25 <i>First 9 months</i> (May 1, 2024 – Jan 31, 2025) (1,000 MT)
<u>Sources of Imports</u>		
Thailand	828	711
India	251	135
Others not Listed	60	17
Total	1,139	863

Source: FAS/Pretoria using data from Trade Data Monitor, LLC

Exports

South Africa imports rice for re-export to neighboring countries in southern Africa, especially to Botswana, Eswatini, Zimbabwe, Zambia, Namibia, and Lesotho (see Table 14). Many of these markets are landlocked and rely on South Africa's infrastructure to facilitate trade. Although exports are relatively small, this usually represents more than 10 percent of South Africa's rice imports. In MY 2025/26, rice exports are expected to rise by three percent to reach 165,000 MT on stable demand growth in the region. In MY 2024/25 South Africa's rice re-exports to the region are expected to grow to 160,000 MT.

Rice consumption in the region is growing due to urbanization and dietary shifts, albeit from a relatively low base. Most re-exports are from South African retail companies that actively expanded operations into other southern African countries, utilizing established infrastructure, branding, and expertise to access new markets. South Africa boasts a relatively advanced retail food infrastructure compared to many other African countries, enabling efficient distribution and supply chains.

Table 14: South Africa Exports of Rice (milled rice equivalent)

	MY 2023/24 <i>Full year</i> (May 1, 2023 – Apr 30, 2024) (1,000 MT)	MY 2024/25 <i>First 9 months</i> (May 1, 2024 – Jan 31, 2025) (1,000 MT)
<u>Destination</u>		
Botswana	49	37
Eswatini	41	32
Zimbabwe	23	19
Namibia	13	13
Zambia	18	8
Lesotho	9	8
Others not Listed	2	2
Total	155	119

Source: FAS/Pretoria using data from Trade Data Monitor, LLC

Stocks

South Africa's rice imports are usually spread throughout the year, keeping stock levels at optimal levels equal to about four weeks of local demand. Stocks are primarily stored by privately owned food companies, traders, and processors. The South African government does not hold any rice stocks or mandate specific stock levels through regulations.

Attachments:

No Attachments