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Tackling foot-and-mouth disease in SA's cattle industry needs urgency

- Few things are as urgent for the South African cattle industry as the need to vaccinate the cattle herd against foot-and-mouth disease (FMD). While most of the country enjoyed December holidays, cattle farmers continued to experience major financial losses as FMD spread across various parts of the country. Numerous auctions were cancelled as farmers tried to limit the spread of the disease, but this has led to significant financial losses for the cattle industry.
- As we celebrated the excellent recovery of South Africa's agriculture in 2025, whose major catalyst was favourable rainfall, the recovery has not been broad-based. The field crops and horticulture subsectors were the primary beneficiaries. In an ordinary season, we would also expect the livestock industry to do better as it benefits from better grazing veld during rainy seasons.
- But 2025 was no ordinary year for the South African livestock industry. Those in sheep and goat farming, amongst others, had a reasonably better year. But cattle farmers struggled with the spread of FMD throughout the year, having already struggled with higher feed costs at the start of the year on the back of the 2023-24 drought.
- While we have had various public engagements across the country on avenues to address FMD disease, and task teams were established to assist the Department of Agriculture, additional urgency is needed right now. The starting point is ensuring vaccines are available to farmers, and this remains a challenge. Admittedly, we are dealing with a biological matter, which requires rigorous scientific care and guidance before major imports, especially at a scale of vaccinating over 12.1 million cattle.
- But time is not on our side, and farmers are losing daily as the disease spread continues to weigh on the industry. This compels the Department of Agriculture to move much more quickly in permitting imports and allowing farmers to use them. This also means the Department must consider importing vaccines from a variety of suppliers, and not rely mainly on Botswana. One other supplier that some in the industry have highlighted is Turkey.
- An engagement with Turkey to assess whether its vaccine can be imported, and in large volume, is necessary at the moment. South Africa faces a major challenge: vaccinating its entire cattle herd, and time is of the essence if we are to make progress this year reduce the damage this disease causes to the sustainability of the South African beef and dairy industries.
- This is a challenge for all farmers, large-scale and subsistence. As auctions dry up, tough economic challenges may arise in the communities where farmers rely on them as their primary point of sale. The

effective way to reopen these auctions soon again is through significant progress in vaccination, so that there is some level of control over the spread of disease.

- Equally, the dairy farmers in the Midlands region of KwaZulu-Natal and other parts of the country have shared the devastating pictures of the challenge the disease is causing in their stock. KwaZulu-Natal and the Eastern Cape are the major dairy-producing areas of South Africa. If these regions continue to struggle with severe FMD, it also raises concerns for the South African dairy industry.
- Admittedly, the industry stakeholders and the government are aware of much of what we state here. But we are highlighting it as a way to call for greater urgency in vaccinating farmers and engaging them beyond the high-level meetings in Pretoria. The South African government must also now rely more on private laboratories for vaccine storage and manufacturing going forward. We should not leave this vital task solely to state-owned laboratories. Collaboration is key in our efforts to overcome this threat to the cattle industry.
- We also must have recognition that the cattle industry is a pillar of South Africa's farming economy, and that its challenges, over time, may start to show in the sector's long-term performance and inclusivity programmes.

WEEKLY HIGHLIGHT

SA agricultural policy priorities for 2026

- There are a few critical policy areas that could have significant positive spinoffs to South Africa's agricultural growth if implemented effectively. The prioritisation of implementation itself would also be refreshing. Let us face it, we have spent the recent past enjoying growth delivered by technological adoption, farmers' and agribusinesses' effectiveness and efficiency, and favourable climatic conditions, rather than a strong policy-driven growth agenda.
- And by this, I am not minimising the government's efforts in various programmes and the stability they provide for the sector. But I am framing it this way to make a point that we can do better.
- We are now at the start of the year, with an opportunity to redefine the path ahead in a way that supports agribusinesses, farmers, and new entrants in the sector. This would be aimed at achieving the prime objective of delivering inclusive growth in the agricultural sector. The starting point should be:

LAND REFORM:

- The Department of Land Reform and Rural Development has, quite frankly, been dismal in 2025. We did not see any meaningful progress on land reform beyond a few high-level policy statements that sought to spark more conversation rather than implementation. Under the Pro-Active Land Acquisition Strategy, the South African government has roughly 2.5 million hectares of land. This land must be released to deserving beneficiaries with title deeds.

- The then Minister of Agriculture, Land Reform and Rural Development, Ms Thoko Didiza, had an elegant approach to releasing this land through a Land Reform Agency, which was supported by organised agriculture and the Land Bank, amongst others. The Department of Land Reform and Rural Development must refocus on this approach.
- The failure to release this land adds to the continuous frustration of the minimal contribution of black farmers to commercial agricultural output. At the time, then-Minister Ms Thoko Didiza was looking to establish the Agency, and we had so much goodwill from various large commercial farmers that we were eager to partner with and support the programme.
- The Department of Land Reform and Rural Development must revive such conversations and reconnect with farmers. The approach, though, must not be the never-ending meetings, but more action-oriented.

EXPORT DIVERSIFICATION:

- South Africa's agriculture is export-oriented, with exports accounting for roughly half of output in value terms. We export to a range of markets across Africa, Asia, the Middle East, the EU, the UK, and the Americas. Still, there remains a considerable need to expand export markets into new areas.
- The Middle East and Asia are among the fastest-growing economies, with large populations, and South Africa still has low penetration in these markets. In 2026, there should be an increased focus on this area.
- We celebrated a few export protocols last year, the result of many years of work from pre-COVID times, which were concluded in 2025. But those don't take us any closer to the level of exports we require. South Africa must seek bilateral export markets in several Asian and Middle Eastern countries. But at the same time, we must work to retain the access we have in Africa, the Americas, the EU, and the UK, amongst others.

REVIEW SACU:

- Some countries may be reluctant to engage deeply with South Africa on trade due to the Southern African Customs Union (SACU). To potential partners, the customs union often appears opaque and unpredictable. Many are interested in South Africa itself, not the wider region.
- Pretoria should therefore press for SACU reform while preserving the development programmes that provide social support to neighbouring states. In today's changing global trade environment, countries must be agile in forming new agreements that sustain their economies. South Africa is on a path of export expansion, and when other countries see their interests aligned with South Africa's, the government must be able to sign trade agreements.
- But this is not always the reality. South Africa generally has to consult with Botswana, Eswatini, Lesotho and Namibia, which are part of SACU. In the past, this practice worked well, as there was no urgency and most trade matters took years to be concluded. Negotiating as a customs union also ensured that countries interacting with the region could access a slightly larger market. But the world has changed, and each country must put its interests first.

PRIORITISE BIOSECURITY:

- For South Africa's agriculture to thrive and access new export markets, we must ensure that our plant and animal health are top-notch. In recent years, we have struggled with foot-and-mouth disease and, occasionally, African swine fever, Avian Influenza, and some plant diseases such as Goss Wilt.
- South Africa's Department of Agriculture must increase its spending and focus on biosecurity. The work, which started with collaboration with the Biosecurity Hub at the University of Pretoria, amongst other organisations, must continue.
- We also need to seriously revive the Agricultural Research Council's capabilities and be more open-minded in partnering with private-sector labs and organisations for research and vaccine manufacturing.

ADDRESS RURAL CRIME AND STOCK THEFT:

- While our agricultural sector has progressed over time, we cannot ignore the challenge of rural crime in South Africa. We often hear of farm killings and theft, which are devastating for the sector. This remains a risk to the investment and prosperity of the agricultural sector.
- Another issue is stock theft, which also continues to weigh on farmers, particularly the new entrant farmers. Statistics South Africa recently reported that in 2024/25, over 61,000 goats were stolen, followed by cattle (37,947) and poultry (36,486). I am highlighting livestock here, but I know of incidents of crop and fruit theft in some regions of the country that also require serious attention.
- This is not an exhaustive list, but starting from these points, we could see serious momentum. The organised agriculture and agribusinesses are eager to support progress in the sector.
- We all know that South Africa's agriculture has excellent growth potential, but the starting point is for the government to take steps to ease the path for others to participate.

WEEK AHEAD

What are we watching this week?

- We start on the global front with two main data releases from the U.S. Department of Agriculture (USDA). Today, the USDA will release the **U.S. Crop Production data**. This will provide key insights about the grains and oilseed outlook for the 2025-26 season. The USDA will also release its **weekly U.S. Grains and Oilseed Export Sales data** scheduled for Thursday.
- On the domestic front, we have a reasonably quiet calendar. The only major releases are on Wednesday, where the South African Grain Information Services (SAGIS) will publish its **weekly data on South Africa's Grain and Oilseed Producer Deliveries**. In the previous release on January 2, South African farmers delivered 8,196 tonnes of maize to commercial silos. This was the 36th weekly delivery for the 2025-26 marketing year (which corresponds with the 2024-25 production season), bringing the overall

maize deliveries so far to 14.90 million tonnes. South Africa's 2024-25 maize harvest is estimated at 16.44 million tonnes, a 28% increase year-on-year, primarily due to expected annual yield improvements.

- The 2025-26 oilseeds marketing year began at the start of March 2025. In the first 44th weeks, soybean producer deliveries totalled 2.71 million tonnes, accounting for 98% of the expected harvest of 2.77 million tonnes. In the case of sunflower seeds, the first 44th weeks of the new 2025-26 marketing year's producer deliveries totalled 694,374 tonnes, of the expected harvest of 708,300 tonnes.
- South Africa's 2025-26 winter wheat season has progressed impressively with the harvest process. In the first 14 weeks of this 2025-26 marketing year, farmers have delivered about 1.58 million tonnes of wheat to commercial silos. This is 79% of the expected harvest of 1.99 million tonnes for the season.
- On Thursday, SAGIS will publish its weekly **South Africa's Grains and Oilseeds Trade data**. In the week of January 2, South Africa exported 13,220 tonnes of maize, with approximately 55% going to Zimbabwe, and the remainder to other countries in the Southern African region. This placed South Africa's 2025-26 maize exports at 1.29 million tonnes, out of the expected seasonal exports of 2.40 million tonnes. The current marketing year only ends in April 2026. We will likely see more robust export activity this quarter, as we anticipate stronger demand in the region.
- While South Africa has an ample harvest and will remain a net exporter of maize, minor imports of yellow maize from Argentina are expected to continue for South Africa's coastal regions. For example, so far in the 2025-26 marketing year, South Africa has imported 110,447 tonnes of yellow maize for feed in the country's coastal regions. These importers mainly take advantage of the affordable prices of Argentinian supplies.
- South Africa is a net wheat importer, and January 2 marked the 14th week of the new 2025-26 marketing year. The cumulative imports to date have totalled 429,604 tonnes from the United States, Latvia, Australia, Lithuania, Russia and Poland. We expect South Africa's 2025-26 wheat imports to reach 1.74 million tonnes, down from 1.83 million tonnes in the 2024-25 marketing year, due to a slight recovery in the domestic harvest.