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Plantings for SA's 2025-26 summer crop seem to have started on time

- This past week, we spent some time on the road, which allowed us to assess early planting activity for the 2025-26 summer crop season. We were encouraged by what we saw. Indeed, in the eastern regions of the country, farmers are already busy tilling the land to take advantage of the early summer rains. We observed activity in some areas of Gauteng, the Free State, KwaZulu-Natal, and the Eastern Cape. These are mainly yellow maize and soybean growing regions, crops that are key to the livestock industry.
- Given that the 2024-25 season was late by roughly a month and a half, there was some concern that the upcoming season may also be slightly behind the typical schedule. But that is not what we are observing on the ground. The fieldwork currently underway suggests that the season is starting on schedule, which would allow the crop to mature early before any potential frost later in the season.
- Importantly, the most recent update from the South African Weather Service (SAWS) is now broadly aligned with other international weather forecasters, who state that the 2025-26 summer season may be a period of La Niña rains. This would be beneficial for crop production and all other agricultural activities.
- On September 30, the SAWS stated that the latest forecasts "indicate that we are moving towards at least a weak La Niña event during the coming summer season. As the period of uncertainty for ENSO during winter and early spring draws to an end, the predictions become more accurate. There are still some predictions that remain neutral. However, a La Niña State is more likely and gaining confidence as we near the summer seasons".
- The La Niña-induced rains may persist through to February 2026, a key period for summer grains and oilseeds. If the 2025-26 summer grain and oilseed production season continues with minimal interruptions, as we expect, the crop could pollinate around February 2026. The crop requires increased moisture during the flowering or pollination stages. This coincides with the rainy period within the above forecasts, which supports the crop, and underscores our optimism about the upcoming season.
- While our early assessment of plantings is based mainly on fieldwork in the eastern regions of South Africa, we note that the western areas are likely only to see the start of planting from mid-November onwards. This would still be an optimal period for crops to receive rainfall that supports their growing conditions.
- While we will continue to monitor the planting activity and crop conditions in the months to follow, another area that will require continuous focus is biosecurity. We continue to face challenges related to

foot-and-mouth disease in the country, resulting in financial losses in some feedlots and livestock farms. The work of addressing this challenge and reviving vaccine manufacturing must continue to ensure the sector is on a positive footing going into 2026. Notably, the rainy summer may present other disease challenges for livestock, but the primary focus remains on foot-and-mouth disease.

- Overall, our optimistic expectations for the 2025-26 summer season seem to have some early support, as fieldwork activity has started on time in the eastern regions of South Africa. Whether farmers plant the typical area for summer grains and oilseeds or not is something we will watch closely in the coming months. Our general view is that plantings will be robust and aligned with the previous season, at about 4.5 million hectares. While we remain upbeat about the 2025-26 season, we are fully aware that a crop cycle is long, and uncertainty about the intensity and timing of rainfall throughout the cycle is a critical factor in achieving yields.