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## SA's 2025-26 winter crop faced some weather-related challenges, but the harvest forecast remains above last season's levels

- As the summer crop growing areas of South Africa approach the start of the new season, the 2025-26 winter crops are far advanced. At the end of September 2025, we received the second production forecast for the season from the Crop Estimates Committee (CEC). There will be eight more production estimates to follow in the coming months, but the data we have begins to provide a reliable picture of the season we are in, which is challenging for some regions. The CEC lowered South Africa's overall winter crop harvest by 1% from the August 2025 estimate to 2.77 million tonnes (but still up 4% from the 2024-25 season). This estimate comprises wheat, barley, canola, oats and sweet lupines. There was a downward revision in almost all of the winter crops except for oats, which remained unchanged from August estimates.
- South Africa's 2025-26 winter wheat production is now forecast at 2.03 million tonnes, down marginally from the August estimate, but still up 5% from the same period last year. The annual improvement is boosted by the expected better harvest in the Northern Cape, Free State, Eastern Cape, and Limpopo. The Western Cape, which accounts for over half of South Africa's winter wheat production, is set to experience a mild decline in the harvest this year compared to the 2024-25 season because of the unfavourable weather conditions in some parts of the province.
- A potential wheat harvest of 2.03 million tonnes implies that South Africa may need to import approximately 1.74 million tonnes in the 2025-26 season to meet its annual needs. These imports are expected to be down 5% from the 2024-25 season.
- Fortunately, the world market has ample wheat supplies, which will ease the imports. The International Grains Council forecasts the 2025-26 global wheat harvest at a record 819 million tonnes, up 2% from the previous season. This is based on the expectation of ample supplies in the EU, Russia, Canada, Argentina, India, and the UK. The expected large global wheat production will boost global stocks, and consequently keep the international wheat prices under pressure for some time. This will be beneficial to the wheat importers and ultimately to consumers in South Africa. Therefore, while farmers may be strained by the expected poor harvest in some regions of the country, consumers are not ultimately at risk from a food price inflation perspective.
- In the case of barley, the 2025-26 harvest is forecast at 346,430 tonnes, which is 2% lower than the August estimate and 7% lower than the previous season. This is a result of both the decline in area plantings and expected poor yields in some regions. Regarding canola, the 2025-26 production is forecast at 311,640 tonnes, down 3% from the August 2025 estimate, but 7% up from the past season. The annual gains are primarily due to the expansion in area plantings. The overall crop has regions that suffered

yield losses. Moreover, the start of canola plantings encounters various challenges, such as snail infestations in some regions, which lead to replanting and thus increase the costs for farmers. Therefore, while the canola harvest is expected to be up from a year ago, the financial conditions of farmers may still be strained.

- South Africa's 2025-26 oats production is forecast at 57,213 tonnes, unchanged from the August estimate and up 32% from a year ago due to the expansion in area plantings. Also worth highlighting is that South Africa's 2025-26 sweet lupine harvest is forecast at 21,000 tonnes, which is down 9% from August but 95% higher than a year ago, and also supported by the expansion in area plantings.
- Ultimately, South Africa's 2025-26 winter crop faces some weather-related challenges, which have led to a downward revision of the production forecast in certain regions. Still, the expected harvest is well above that of the 2024-25 season, which means, in terms of supplies, the country remains in a favourable position. Moreover, the ample global wheat supplies will also help alleviate concerns about food price inflation. We are early in the season, and as the season progresses, there may be some adjustments to the data.