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## South Africa is in for a better 2025-26 summer grains and oilseed production season

- These are still early days for South Africa's 2025-26 summer grains and oilseeds production season, but from its very start, it appears that we are in yet another better production year ahead. The favourable weather conditions since the start of the season in October 2025, combined with the expansion in area plantings, have always underpinned our optimism, and the crop production data released by the Crop Estimate Committee this afternoon further underscores it.
- We now have the first production estimate for the 2025-26 season, at 19.82 million tonnes. While this is 3% less than the 2024-25 season, it remains an encouraging estimate. We must not forget that the 2024-25 summer grains and oilseeds were the second-largest on record; therefore, being marginally lower than they were is not cause for concern. This production figure comprises maize, sunflower seed, soybean, groundnuts, sorghum, and dry beans. We see minor annual downward revisions in most crops, except for sunflower seed and groundnuts.
- If we zoom in on the major grains, the 2025-26 maize production estimate is 16.13 million tonnes, down 3% from the previous season but well above the long-term average production. Importantly, this expected harvest is well above South Africa's annual maize usage of 12.0 million tonnes. The 3% expected annual decline in the harvest is due to poor yields in some regions, as plantings are higher than in the previous season. About 8.51 million tonnes of white maize, with 7.62 million tonnes being yellow maize. Such a maize crop, combined with likely large carryover stocks from the current season, signals that South Africa will yet again remain a net exporter of maize in the 2026-27 marketing year that begins in May (this corresponds with the 2025-26 production season).
- The 2025-26 soybean harvest is estimated at 2.66 million tonnes, down 5% from the previous year, largely due to expected poor yields in some areas. Still, a harvest of 2.66 million tonnes is well above the long-term average production levels, and will keep South Africa at a net exporting position. The sorghum harvest will likely fall by 12% to 131,888 tonnes due to a reduction in planted area and expected poor yields in some regions, and the dry beans harvest will be down by 13% to 78,594 tonnes, also because of the reduction in planted area and expected poor yields in some regions. For sunflower seed, the 2025-26 harvest is forecast at 754,475 tonnes, up 8% from the previous season, benefiting from an expansion in planted area. The 2025-26 groundnut harvest is forecast at 65 238 tonnes (up 3% y/y).
- In essence, we are still in the early days, but this first production forecast for the season provides valuable guidance on the potential harvest size for South Africa's 2025-26 grains and oilseeds production season. We still have nine more monthly forecasts to follow, which may contain some revisions. Still, provided that weather conditions have generally been favourable across most regions of South Africa, we are inclined to believe that we are in for a better 2025-26 summer season for grains and oilseed production. From a consumer perspective, these data will likely continue to put downward pressure on grain and oilseed prices, supporting our long-standing view of a moderating path of food price inflation in 2026.