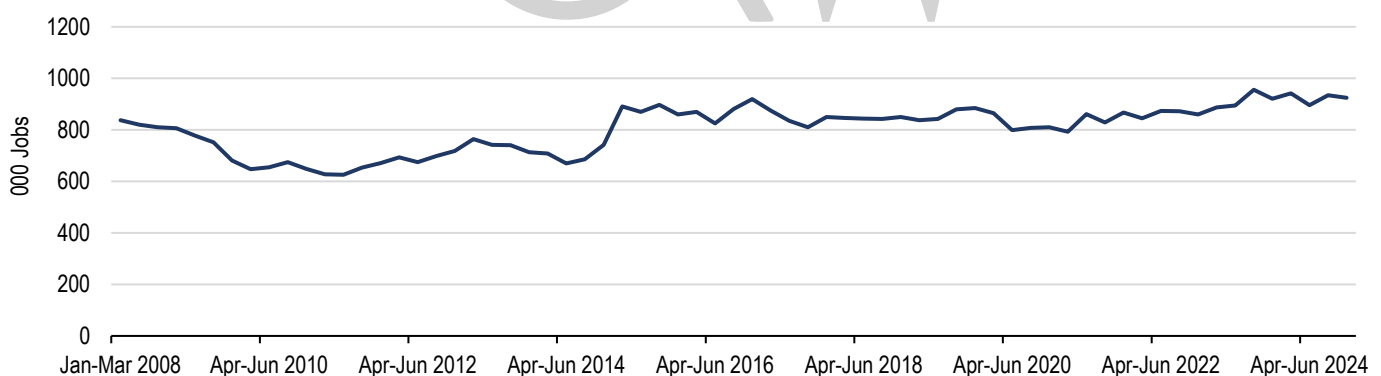


A mild quarterly recovery in the SA farm job market

- While encouraging, South African agricultural employment was not as robust as some may have anticipated in the first quarter. The data released by Stats SA show that primary agriculture employment increased mildly by 1% from the last quarter of 2024 to 930k jobs in the first quarter of 2025. Field crops, game, and hunting are the subsectors that underpin this improvement in employment conditions.
- However, from an annual perspective, the employment was down 1%, unchanged from the first quarter of 2024. This suggests that while the agricultural sector is recovering, supported by the favourable weather conditions, financial difficulties from the previous year remain, and the recovery remains uneven amongst subsectors and regions. Encouragingly, the primary agricultural employment of 930k people is well above the long-term jobs of 799k. From a regional perspective, the Eastern Cape, Free State, KwaZulu-Natal, North West, Gauteng and Mpumalanga are the provinces that registered quarterly job losses. Meanwhile, the Western Cape, Northern Cape and Limpopo underpin the mild job gains.
- Given that the season was late by roughly a month in the summer crop regions, and that we have harvesting underway from the second quarter into the third quarter on field crops and some horticulture, it is fair to assume that we may see a quarterly uptick in jobs in the subsequent releases. Importantly, we have a relatively robust season. The 2024-25 summer grain and oilseed production is forecast at 18.01 million tonnes, up by 16% y/y. The wine grape harvest is also set to recover 11% from the past season to 1.24 million tonnes. We also anticipate a better harvest of the various fruits.
- Admittedly, not all is well in South Africa's agriculture. The sector continues to struggle with foot and mouth disease, which will add financial pressures to the livestock industry and jobs. There also remain risks on the global trade front, mainly the U.S. tariffs. There are long-standing challenges, such as port inefficiencies, poor rail and roads, crime and stock theft, and worsening municipal service delivery.

Exhibit I: South Africa's agricultural jobs



Source: Statistics South Africa and Agbiz Research