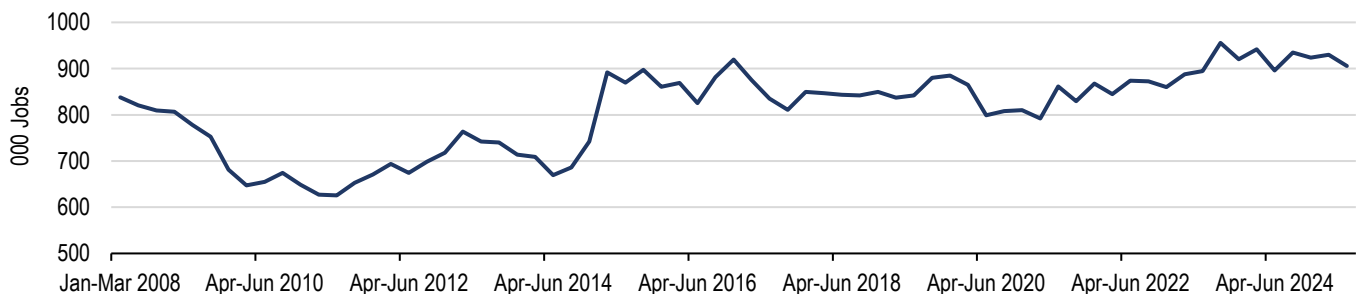


12 August 2025

## SA farm jobs decline mildly in Q2,2025

- **The South African farm jobs have declined mildly from the first quarter of this year by 3% to 906k in the second quarter. We see the quarterly decline mainly in the livestock industry, some field crops, and aquaculture. This could be linked to specific challenges these industries are facing, particularly the foot-and-mouth disease in cattle farming in South Africa. We also think the delays in harvesting some summer crops may have also weighed on employment conditions.**
- Still, we gain some encouragement in noticing that from an annual perspective, the overall farm employment is up 1% from the second quarter of 2024. The annual uptick is consistent with the robust production in field crops and horticulture that we see in the country. For example, the Crop Estimates Committee forecasts the 2024-25 summer grains and oilseeds harvest at 18.74 million tonnes, up 21% y/y. We also see encouraging production data across various fruits, wine, sugarcane, and vegetables.
- The only subsectors that have lower employment levels compared to a year ago are mainly aquaculture, forestry, and the production of organic fertiliser. Still, the employment of 906k is far above the long-term average level of 799k jobs, signalling that while the sector faces challenges, the employment conditions remain at encouraging levels. From a regional perspective, the Western Cape, Northern Cape, KwaZulu-Natal, and Gauteng are the provinces that registered quarterly job losses. Meanwhile, other provinces saw mild quarterly job gains.
- **In essence, as the sector continues to struggle with foot and mouth disease, which will add financial pressures to the livestock industry, and lingering trade concerns, there remain some risks to South Africa's farming jobs.** Beyond these near-term matters, there are long-standing challenges, such as port inefficiencies, poor rail and roads, crime and stock theft, and worsening municipal service delivery, which also continue to constrain the growth of the sector and job prospects.

### Exhibit I: South Africa's agricultural jobs



Source: Statistics South Africa and Agbiz Research