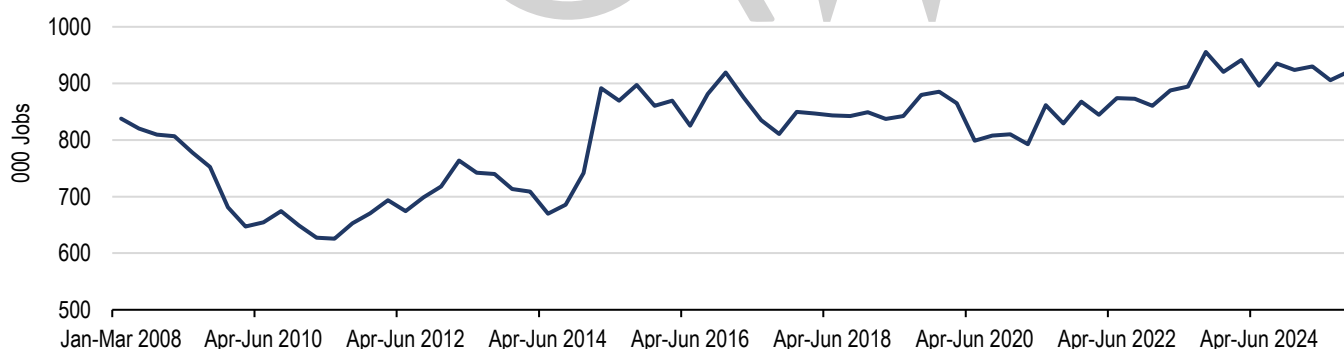


South Africa's farm jobs increased slightly in Q3,2025

- The number of farm jobs in South Africa has increased slightly from the second quarter of 2025, by 2% to 920k in the third quarter. We see the quarterly improvements mainly in some field crops, horticulture, forestry, and in the production of organic fertiliser. The increase in jobs reflects the optimism generated by the abundant harvest in these subsectors, which we have highlighted on numerous occasions. The one subsector that remains under pressure is the livestock industry, mainly due to the foot-and-mouth disease. We must note that, from an annual perspective, agricultural jobs are down 2% from the levels seen in the third quarter of 2024, partly due to challenges in the livestock industry.
- Notably, the jobs of 920k are far above the long-term average level of 799k jobs, signalling that while the sector faces challenges such as animal diseases, wage pressures in some industries and inept municipal service deliveries, among other issues, the employment conditions remain at encouraging levels.
- From a regional perspective, the Western Cape, Free State and Mpumalanga are the only provinces that registered quarterly job losses. Meanwhile, other provinces saw mild quarterly job gains. With that said, the Western Cape remains a major agricultural employer, accounting for 21% of South African agricultural jobs, followed by Limpopo (18%), KwaZulu-Natal (13%), Mpumalanga (12%), Eastern Cape (11%), Free State (8%), North West (8%), Northern Cape (5%), and Gauteng (4%).
- Overall, our key takeaway from the jobs data is that the favourable production conditions in horticulture and field crops continue to sustain healthy employment levels. As we expect favourable agricultural conditions to continue in the 2025-26 season, such employment levels are likely to be sustained into 2026. Still, the effects of the foot-and-mouth disease remain visible in the job data, and this could continue to be a challenge through to 2026.

Exhibit I: South Africa's agricultural jobs



Source: Statistics South Africa and Agbiz Research