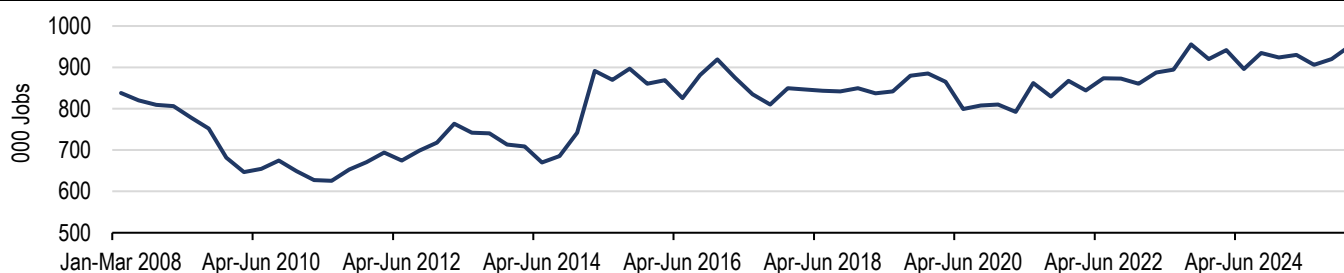


South Africa's farm jobs ended 2025 at the highest since Q3 2023

- **South Africa's agriculture had a reasonably positive year in 2025, though challenges persisted in the livestock industry. We see that better agricultural performance is also reflected in the jobs data. For example, the number of farm jobs in South Africa increased by 3% year-on-year in the last quarter of 2025 to 950k, according to Quarterly Labour Force Survey data from Statistics South Africa. This is the highest level since the third quarter of 2023. We observed improved job performance, primarily in field crops and horticulture. The increase in jobs in these subsectors reflects the optimism generated by the abundant harvest, 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 also saw a reduction in employment in animal husbandry, organic fertiliser production, forestry, and in the fisheries.**
- Notably, the jobs of 950k are far above the long-term average of 799k jobs, signalling that, while the sector faces challenges such as animal diseases, wage pressures in some industries, and inept municipal service delivery, among other issues, employment conditions remain encouraging.
- From a regional perspective, the Western Cape, Northern Cape, Free State, North West and Limpopo were the key provinces supporting the robust employment. Meanwhile, other provinces registered a minor reduction in employment.
- In essence, our key takeaway from the jobs data is that the favourable production conditions in horticulture and field crops sustained healthy employment levels in South Africa's agriculture through to the end of 2025. As we expect favourable agricultural conditions to continue in the 2025-26 season, we expect these employment levels to prevail. But we are concerned about the recent floods in Limpopo and parts of Mpumalanga, and we will be watching their impact on the activity in the fruit industry. Again, our primary concern is the quality of the crop and the income levels in the farms, not necessarily a major harvest decline. In the livestock industry, much depends on the pace of vaccination against foot-and-mouth disease in the coming months.

Exhibit I: South Africa's agricultural jobs



Source: Statistics South Africa and Agbiz Research