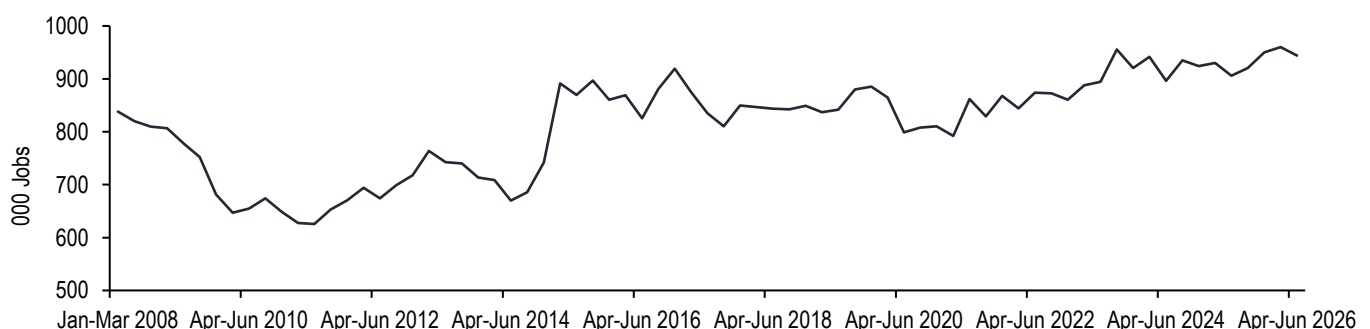


## SA farm jobs fell mildly from the first quarter but remained at a higher level

- Employment conditions in the South African farming sector remain robust, well above long-term average levels. Indeed, in the second quarter of 2026, the farming sector saw a mild decline in employment, aligned with slowing seasonal farm activity. Still, the number of jobs remained at reasonably better levels. For example, the Quarterly Labour Force Survey for the second quarter of 2026, released earlier today by Statistics South Africa, shows that the farming sector employed 944k people in the second quarter, down 2% quarter-on-quarter, but up 4% from the same period last year. If we zoom in from a provincial perspective, most provinces experienced a mild employment decline from the first quarter of the year, except for the Northern Cape, KwaZulu-Natal, Gauteng, and Limpopo.
- The annual uptick in employment (up 4% year-on-year) shows that we are generally in a year of agricultural abundance in fruits, vegetables, and various field crops, all of which are labour-intensive. We struggled and continue to struggle with foot-and-mouth disease in cattle, and some cases of African swine fever in the pork industry. Still, the overall picture of the sector looks promising for this year. In recent weeks, there have been rising concerns about likely labour shortages in various parts of the country emanating from the ongoing immigration discourse. There are indeed isolated cases of labour challenges, but the broader sector doesn't face such a challenge. In the surveys we have done, we found the challenge isolated in a few areas and industries, and not widespread.
- Overall, while primary agricultural jobs fell from the previous quarter, these figures are generally better and well above the sector's average of 799k. But going into 2027, there are risks ahead. Higher input costs, fuel and fertiliser, because of the Middle East war, along with the expected El Niño drought, are some of the risks that could weigh on the sector and on employment conditions from now on. We also see pressures in the sector from rising electricity prices, which add financial strain to farmers in irrigation regions, which produce all of South Africa's fruits and vegetables and roughly 20% of the field crops.

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



Source: Statistics South Africa and Agbiz Research