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Promoting market access for South African agriculture

COMMENTARY

Insights into South Africa's Agricultural Employment Trends: **Quarter 3-2025**

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Introduction

The shifts in South Africa's labour market in the third quarter (July – September) of 2025 carry important implications for the country's economic stability and the agriculture industry, which continues to play a central role in rural livelihoods, food system resilience, and employment creation. Improvements in national employment levels suggest a recovering labour market, but the pace and sustainability of this recovery remain dependent on the performance of key sectors. Agriculture remains a vital sector in the economy through employment opportunities and enhancing national food security. Understanding the shifts in employment trends within the sector is therefore critical for guiding policy makers, industry planning, and farm management decision-making.

Labour Market Overview

According to the latest Quarterly Labour Force Survey (Q3:2025), total employment increased by 248 000, bringing the total number of employed South Africans to 17.1 million in Q3 (2025). Notably, the number of unemployed persons declined by 360 000, leading to a reduction in the unemployment rate to 31.9%. For South Africa, this improvement signals improving economic activity, greater labour absorption across several industries, and a slight easing of pressure on households facing persistent challenges due to the high cost-of-living. However, a deeper scrutiny into the data reveals that there was an increase of 36 000 discouraged work-seekers, accompanied by an increased by 130 000 of other available work seekers, and an increase of 64 000 for those who are seeking work, but it is unavailable. These figures indicate that while job creation is occurring, structural issues such as limited labour absorption, rural vulnerabilities, and production constraints continue to shape the country's employment landscape.

Agricultural Sector Employment

Agriculture stands out as a sector that experienced growth during the third quarter of 2025. Employment in the agriculture industry increased from 906 000 in Q2 (2025) to 920 000 in Q3 (2025), reflecting a 1.5% increase. This suggests that 14 000 additional jobs were created during Q3. The quarterly increase is likely driven by seasonal labour demand associated with strong harvest periods in horticulture, field crops, and forestry subsectors, as well as improved export performance, particularly in citrus and avocado industries. Over the long term, agriculture has demonstrated resilience, and agricultural employment has increased by 40.9% from 2011 to 2025. This growth highlights the sector's sustained capacity to absorb labour even during periods of economic uncertainty as evidenced during the period of COVID-19 pandemic. Despite these encouraging quarterly results, the year-on-year decline of 15 000 jobs reveals that agriculture remains sensitive to fluctuations in production conditions, rising input costs, and market uncertainties.

Suggested interventions

Looking ahead and tapping into the interventions outlined in the Agriculture and Agro-processing Master Plan (AAMP), requires strengthening coordination between social partners such as government, industry, and farmer organisations to ensure that labour market interventions are responsive, evidence-based, and tailored to district, regional and provincial production realities. Expanding labour-intensive value chains, such as horticulture, livestock, and agro processing, will also create more sustainable job opportunities and reduce reliance on seasonal hiring. Enhancing market access and supporting export growth can further enhance farmers' ability to expand operations and sustain employment levels.

In conclusion, the growth in national employment and the positive quarterly trade performance of the agricultural sector in Q3 (2025) provide encouraging signs for South Africa's economy. Agriculture continues to play a critical role in job creation, rural economic stability, and food security. However, the sector's vulnerability to high production costs, climate variability, and global market shifts highlights the need for sustained support and long-term strategies to develop farmers and strengthen labour absorption capacity. South Africa can enhance the agricultural sector's contribution to national development agenda and solidify its role within a recovering labour market through optimal production of underutilised and underdeveloped value chains such as the indigenous crops and medicinal plants that were recently declared as agricultural products. The strategic move is expected to unlock economic potential valued at an estimated R12 billion per annum along with significant employment opportunities,