NAMC

Promoting market access for South African agriculture

South African Supply and Demand Estimates

October 2026 Report

GRAIN & OILSEEDS SUPPLY & DEMAND ESTIMATES COMMITTEE (S&DEC)

SASDE – 161st meeting held on 30th October 2026

The NAMC, Maize Trust, Oil and Protein Seeds Development Trust, Sorghum Trust and SA Winter Cereal Industry Agency (SAWCIA) jointly fund the Grain and Oilseeds Supply & Demand Estimates (SASDE) initiative

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THE SOUTH AFRICAN SUPPLY AND DEMAND PROJECTIONS FOR GRAINS AND OILSEEDS FOR OCTOBER 2026 ARE AS FOLLOWS:

WHITE MAIZE (2026/27)

Supply: The total supply of white maize is forecast at 11 477 164 tons for the **2026/27** marketing season. This includes an opening stock level (at 1 May 2026) of 1 937 498 tons and local commercial deliveries of 9 552 340 tons. Imports of zero tons of white maize are forecast for the season, while early deliveries of minus 32 674 tons and a surplus of 20 000 tons are expected.

Demand: The total demand (domestic plus exports) for white maize is forecast at 6 913 700 tons. The total domestic demand is forecast at 5 843 700 tons. This includes 4 720 000 tons processed for human consumption, 1 100 000 tons processed for animal and industrial consumption, 8 400 tons for gristing, 12 000 tons withdrawn by producers, 800 tons released to end-consumers and a balancing figure of 2 500 tons (net receipts and net dispatches). The quantity of 220 000 tons of processed products and 850 000 tons of white whole maize is forecast for exports for the **2026/27** marketing season.

Stock levels: The closing stock level for 30 April 2027 is forecast at 4 563 464 tons. At an average processed quantity of 485 700 tons per month, this represents available stock levels for 9 months or 286 days.

YELLOW MAIZE (2026/27)

Supply: The total supply of yellow maize is forecast at 8 537 110 tons for the **2026/27** marketing season. This includes an opening stock (at 1 May 2026) of 988 289 tons and local commercial deliveries of 7 474 050 tons. Imports are forecast at 100 000 tons for the season, early deliveries of minus 40 229 tons and a surplus of 15 000 tons.

Demand: The total demand (domestic plus exports) for yellow maize is forecast at 7 589 300 tons. The total domestic demand is forecast at 5 806 300 tons. This includes 670 000 tons processed for human consumption, 5 100 000 tons processed for animal and industrial consumption, 18 000 tons for gristing, 2 300 tons withdrawn by producers, 14 000 tons released to end-consumers and a balancing figure of 2 000 tons (net receipts and net dispatches). A projected export quantity of 133 000 tons of processed products and 1 650 000 tons of yellow whole maize is forecast for exports for the **2026/27** marketing season.

Stock levels: The closing stock level for 30 April 2027 is forecast at 947 810 tons. At an average processed quantity of 482 333 tons per month, this represents available stock levels for 2 months or 60 days.

TOTAL MAIZE (2026/27)

Supply: The total supply of maize is forecast at 20 014 274 tons for the **2026/27** marketing season. This includes an opening stock (at 1 May 2026) of 2 925 787 tons and local commercial deliveries of 17 026 390 tons. Imports of 100 000 tons are expected, early deliveries of minus 72 903 tons and a surplus of 35 000 tons.

Demand: The total demand (domestic plus exports) for maize is forecast at 14 503 000 tons. The total domestic demand is projected at 11 650 000 tons. This includes 5 390 000 tons processed for human consumption, 6 200 000 tons processed for animal and industrial consumption, 26 400 tons for gristing, 14 300 tons withdrawn by producers, 14 800 tons released to end-consumers and a balancing figure of 4 500 tons (net receipts and net dispatches). A quantity of 353 000 tons of processed products and 2 500 000 tons of total whole maize is forecast for exports for the **2026/27** marketing season.

Stock levels: The closing stock level for 30 April 2027 is forecast at 5 511 274 tons. At an average processed quantity of 968 033 tons per month, this represents available stock levels for 6 months or 173 days.

See Appendix 1 for detailed S&D table. An explanation of terms and calculations is available on the NAMC website (https://www.namc.co.za/category/research-publications/supply-demand-estimates/).

SWEET SORGHUM (2026/27)

Supply: The total supply of sweet sorghum is forecast at 126 765 tons for the **2026/27** marketing season. This includes an opening stock level (at 1 March 2026) of 45 390 tons, local commercial deliveries of 80 250 tons, imports of 25 tons for South Africa and a sweet sorghum surplus of 1 100 tons.

Demand: The total demand (domestic plus exports) for sweet sorghum is forecast at 109 620 tons. This includes 1 100 tons for indoor malting, 1 500 tons for floor malting, 84 000 tons for meal, rice and grits, 11 300 tons for feed, 800 tons withdrawn by producers, 120 tons released to end consumers, a balancing figure of minus 200 tons (net receipts and net dispatches) and a deficit of 0 tons. A quantity of 11 000 tons of sweet sorghum is forecast for exports for the **2026/27** marketing season.

Stock levels: The closing stock level for 28 February 2027 is forecast at 17 145 tons. At an average processed quantity of 8 158 tons per month, this represents available stock levels for 2 months or 64 days

BITTER SORGHUM (2026/27)

Supply: The total supply of bitter sorghum is forecast at 87 886 tons for the **2026/27** marketing season. This includes an opening stock level (at 1 March 2026) of 44 811 tons, local commercial deliveries of 42 075 tons, bitter sorghum imports of 0 tons and a surplus of 1 000 tons for South Africa.

Demand: The total demand (domestic plus exports) for bitter sorghum is forecast at 56 680 tons. This includes 14 500 tons for indoor malting, 31 000 tons for floor malting, 3 700 tons for meal, rice and grits, 3 300 tons for feed, 700 tons withdrawn by producers, 80 tons released to end consumers, a balancing figure of 650 tons (net receipts and net dispatches), and a deficit of 0 tons. A quantity of 2 750 tons of bitter sorghum is forecast for exports for the **2026/27** marketing season.

Stock levels: The closing stock level for 28 February 2027 is forecast at 31 206 tons. At an average processed quantity of 4 375 tons per month, this represents available stock levels for 7 months or 217 days.

TOTAL SORGHUM (2026/27)

Supply: The total supply of sorghum is forecast at 214 651 tons for the **2026/27** marketing season. This includes an opening stock level (at 1 March 2026) of 90 201 tons, local commercial deliveries of 122 325 tons, sorghum imports of 25 tons for South Africa with a surplus of 2 100 tons.

Demand: The total demand (domestic plus exports) for sorghum is forecast at 166 300 tons. This includes 15 600 tons for indoor malting, 32 500 tons for floor malting, 87 700 tons for meal, rice and grits, 14 600 tons for feed, 1 500 tons withdrawn by producers, 200 tons released to end consumers, a balancing figure of 450 tons (net receipts and net dispatches), and a deficit of 0 tons. A quantity of 13 750 tons of total sorghum is forecast as exports for the **2026/27** marketing season.

Stock levels: The closing stock level for 28 February 2027 is forecast at 48 351 tons. At an average processed quantity of 12 533 tons per month, this represents available stock levels for 4 months or 117 days.

See Appendix 2 for detailed S&D table.

WHEAT (2026/27)

Supply: The total supply of wheat is forecast at 4 518 368 tons for the **2026/27** marketing season. This includes an opening stock level (at 1 October 2026) of 801 148 tons, local commercial deliveries of 1 751 220 tons, whole wheat imports forecast for South Africa of 1 960 000 tons and a surplus of 6 000 tons.

Demand: The total demand (domestic plus exports) for wheat is forecast at 3 723 100 tons. This includes 3 540 000 tons processed for human consumption, 3 500 tons processed for animal consumption, 2 300 tons withdrawn by producers, 1 400 tons released to end consumers, 16 000 tons projected seed for planting purposes, a balancing figure of 3 900 tons (net receipts and net dispatches) and a deficit of 0 tons. A quantity of 36 000 tons of processed products and 120 000 tons of whole wheat is forecast for exports for the **2026/27** marketing season.

Stock levels: The closing stock level for 30 September 2027 is forecast at 795 268 tons. At an average processed quantity of 295 292 tons per month, this represents available stock levels for 3 months or 82 days.

See Appendix 3 for detailed S&D table.

SUNFLOWER SEED (2026/27)

Supply: The total supply of sunflower seed is forecast at 935 071 tons for the **2026/27** marketing season. This includes an opening stock level (at 1 March 2026) of 49 266 tons, local commercial deliveries of 874 805 tons, sunflower seed imports of 7 000 tons for South Africa and a surplus of 4 000 tons.

Demand: The total demand (domestic plus exports) for sunflower seed is forecast at 863 050 tons. This includes 2 500 tons processed for human consumption, 6 300 tons processed for animal consumption, 850 000 tons for crush (oil and oilcake), 80 tons withdrawn by producers, 70 tons released to end consumers, 3 500 tons of seed for planting purposes and a balancing figure of 300 tons (net receipts and net dispatches). A quantity of 300 tons is forecast for exports for the **2026/27** marketing season.

Stock levels: The closing stock level for 28 February 2027 is forecast at 72 021 tons. At an average processed quantity of 71 567 tons per month, this represents available stock levels for 1 month or 31 days.

See Appendix 4 for detailed S&D table.

SOYBEANS (2026/27)

Supply: The total supply of soybeans is forecast at 3 255 295 tons for the **2026/27** marketing season. This includes an opening stock level (at 1 March 2026) of 286 120 tons, local commercial deliveries of 2 955 175 tons, 4 000 tons of soybean imports for South Africa and a surplus of 10 000 tons.

Demand: The total demand (domestic plus exports) for soybeans is forecast at 3 014 080 tons. This includes 21 000 tons processed for human consumption, 122 000 tons processed for animal (full fat) feed, 2 460 000 tons for crush (oil and oilcake) for the domestic market, 220 tons withdrawn by producers, 160 tons released to end consumers, 9 800 tons seed for planting purposes, a balancing

figure of 900 tons (net receipts and net dispatches) and a deficit of 0 tons. A quantity of 400 000 tons for exports is forecast for the **2026/27** marketing season.

Stock levels: The closing stock level for 28 February 2027 is forecast at 241 215 tons. At an average processed quantity of 216 917 tons per month, this represents available stock levels for 1 month or 34 days.

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See Appendix 5 for detailed S&D table.

PLEASE NOTE:
The November SASDE Report will be released on 01 December 2026.

Appendix 1: Detailed S & D table for Maize: October 2026

		White Maize	White Maize	White Maize	Yellow Maize	Yellow Maize	Yellow Maize	Total Maize	Total Maize	Total Maize
	Marketing season	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**
		tons	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**
1	CEC (Crop Estimate)	6 055 000	8 500 000	9 777 340	6 795 000	8 225 000	7 914 050	12 850 000	16 725 000	17 691 390
2	CEC (Retention)	170 000	171 253	225 000	450 000	397 065	440 000	620 000	568 318	665 000
3	Min: Early deliveries for current season (March + April)	398 292	252 386	382 674	709 366	386 162	500 229	1 107 658	638 548	882 903
4	Plus: Early deliveries for next season (March + April)**	252 386	382 674	350 000	386 162	500 229	460 000	638 548	882 903	810 000
5	**Available for the commercial market**	**5 739 094**	**8 459 035**	**9 519 666**	**6 021 796**	**7 942 002**	**7 433 821**	**11 760 890**	**16 401 037**	**16 953 487**
6	**SUPPLY**									
7	Opening stock (1 May)	1 346 876	365 498	1 937 498	1 057 664	288 292	988 289	2 404 540	653 790	2 925 787
8	Producer deliveries	5 692 357	8 459 308	9 552 340	5 968 332	7 943 659	7 474 050	11 660 689	16 402 967	17 026 390
9	Imports	119 394	0	0	818 165	110 448	100 000	937 559	110 448	100 000
10	Early deliveries (Net)*	0	0	-32 674	0	0	-40 229	0	0	-72 903
11	Surplus	26 868	35 586	20 000	19 273	19 637	15 000	46 141	55 223	35 000
12	**Total Supply**	**7 185 495**	**8 860 392**	**11 477 164**	**7 863 434**	**8 362 036**	**8 537 110**	**15 048 929**	**17 222 428**	**20 014 274**
13	**DEMAND**									
14	**Processed for the local market**	**4 918 377**	**5 453 151**	**5 828 400**	**6 649 505**	**6 349 561**	**5 788 000**	**11 567 882**	**11 802 712**	**11 616 400**
15	- human	4 813 933	4 912 030	4 720 000	610 717	682 077	670 000	5 424 650	5 594 107	5 390 000
16	- animal and industrial	97 257	532 638	1 100 000	6 027 783	5 648 769	5 100 000	6 125 040	6 181 407	6 200 000
17	- gristing	7 187	8 483	8 400	11 005	18 715	18 000	18 192	27 198	26 400
18	Withdrawn by producers	6 054	13 170	12 000	2 205	2 233	2 300	8 259	15 403	14 300

19	Released to end-consumers	200	355	800	15 917	11 621	14 000	16 117	11 976	14 800
20	Net receipts(-)/disp(+)	1 763	3 251	2 500	2 589	969	2 000	4 352	4 220	4 500
21	Deficit	0	0	0	0	0	0	0	0	0
22	**Local demand**	**4 926 394**	**5 469 927**	**5 843 700**	**6 670 216**	**6 364 384**	**5 806 300**	**11 596 610**	**11 834 311**	**11 650 000**
23	**Exports**	1 893 603	1 452 967	1 070 000	904 926	1 009 363	1 783 000	2 798 529	2 462 330	2 853 000
24	- products	401 916	272 220	220 000	123 932	136 523	133 000	525 848	408 743	353 000
25	- whole maize	1 491 687	1 180 747	850 000	780 994	872 840	1 650 000	2 272 681	2 053 587	2 500 000
26	**Total Demand**	**6 819 997**	**6 922 894**	**6 913 700**	**7 575 142**	**7 373 747**	**7 589 300**	**14 395 139**	**14 296 641**	**14 503 000**
27	**Closing Stock (30 Apr)**	**365 498**	**1 937 498**	**4 563 464**	**288 292**	**988 289**	**947 810**	**653 790**	**2 925 787**	**5 511 274**
28	- processed p/month	409 865	454 429	485 700	554 125	529 130	482 333	963 990	983 559	968 033
29	- months' stock	1	4	9	1	2	2	1	3	6
30	**- days' stock**	**27**	**130**	**286**	**16**	**57**	**60**	**21**	**90**	**173**

Appendix 2: Detailed S & D table for Sorghum: October 2026

		Sweet Sorghum	Sweet Sorghum	Sweet Sorghum	Bitter Sorghum	Bitter Sorghum	Bitter Sorghum	Total Sorghum	Total Sorghum	Total Sorghum
	Marketing season	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**
		tons	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**
1	CEC (Crop Estimate)	66 700	73 852	81 000	31 300	80 148	42 325	98 000	154 000	123 325
2	CEC Retentions	1 600	885	750	600	292	250	2 200	1 177	1 000
3	**Available for the commercial market**	**65 100**	**72 967**	**80 250**	**30 700**	**79 856**	**42 075**	**95 800**	**152 823**	**122 325**
4	**SUPPLY**									
5	Opening stock (1 Mch)	45 693	76 364	45 390	9 082	10 033	44 811	54 775	86 397	90 201
6	Prod deliveries	65 228	72 967	80 250	30 169	79 856	42 075	95 397	152 823	122 325
7	Imports for South Africa	99 085	24	25	61	0	0	99 146	24	25
8	Surplus	2 079	0	1 100	0	449	1 000	1 358	449	2 100
9	**Total Supply**	**212 085**	**149 355**	**126 765**	**39 312**	**90 338**	**87 886**	**250 676**	**239 693**	**214 651**
10	**DEMAND**									
11	**Processed**	**116 921**	**98 552**	**97 900**	**26 557**	**41 498**	**52 500**	**143 478**	**140 050**	**150 400**
12	- Indoor malting	1 612	1 438	1 100	12 175	15 102	14 500	13 787	16 540	15 600
13	- Floor malting	34 399	14 887	1 500	9 303	21 781	31 000	43 702	36 668	32 500
14	- Meal, rice & grits	71 487	73 278	84 000	3 136	2 272	3 700	74 623	75 550	87 700
15	- Pet Food	509	706	1 200	28	207	100	537	913	1 300
16	- Poultry feed	6 642	6 321	6 500	1 354	1 125	1 200	7 996	7 446	7 700

		Sweet Sorghum	Sweet Sorghum	Sweet Sorghum	Bitter Sorghum	Bitter Sorghum	Bitter Sorghum	Total Sorghum	Total Sorghum	Total Sorghum
	Marketing season	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**
		tons	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**	**tons**
17	- Livestock feed	2 272	1 922	3 600	561	1 011	2 000	2 833	2 933	5 600
18	Bio-fuel	0	0	0	0	0	0	0	0	0
19	Withdrawn by prod	471	660	800	360	1 190	700	831	1 850	1 500
20	Released to end-cons	25	81	120	79	20	80	104	101	200
21	Net receipts(-)/ disp(+)	771	-65	-200	-424	431	650	347	366	450
22	Deficit	0	1 328	0	721	0	0	0	1 328	0
23	Exports	17 533	3 409	11 000	1 986	2 388	2 750	19 519	5 797	13 750
24	**Total Demand**	**135 721**	**103 965**	**109 620**	**29 279**	**45 527**	**56 680**	**164 279**	**149 492**	**166 300**
25	**Ending Stock (28/29 Feb)**	**76 364**	**45 390**	**17 145**	**10 033**	**44 811**	**31 206**	**86 397**	**90 201**	**48 351**
26	- processed p/month	9 743	8 213	8 158	2 213	3 458	4 375	11 957	11 671	12 533
27	- months' stock	7,8	5,5	2,1	5	13	7	7,2	7,7	4
28	**- days' stock**	**238**	**168**	**64**	**138**	**394**	**217**	**220**	**235**	**117**

Appendix 3: Detailed S & D table for Wheat: October 2026

		Wheat	Wheat	Wheat
	Marketing season	**Final for 2024/25**	**Prelim Final for 2025/26**	**Projection for 2026/27**
		tons	**tons**	**tons**
1	CEC (Crop Estimate)	1 930 000	1 905 500	1 789 220
2	CEC (Retention)	40 500	45 500	38 000
3	**SUPPLY**			
4	Opening stock (1 Oct)	749 838	650 894	801 148
5	Prod deliveries*	1 891 177	1 861 849	1 751 220
6	Imports	1 842 241	1 983 848	1 960 000
7	Surplus	11 247	968	6 000
8	**Total Supply**	**4 494 503**	**4 497 559**	**4 518 368**
9	**DEMAND**			
10	**Processed for local market**	**3 555 889**	**3 527 028**	**3 543 500**
11	- human	3 543 940	3 524 371	3 540 000
12	- animal	11 949	2 657	3 500
13	- gristing	0	0	0
14	Withdrawn by producers	1 717	1 323	2 300
15	Released to end-consumers	1 605	1 259	1 400
16	Seed for planting purposes	17 154	15 954	16 000
17	Net receipts(-)/disp(+)	5 697	2 832	3 900
18	Deficit	0	0	0
19	**Exports**	**261 547**	**148 015**	**156 000**
20	- products (processed for exports)	36 737	41 291	36 000
21	- whole wheat	224 810	106 724	120 000
22	**Total Demand**	**3 843 609**	**3 696 411**	**3 723 100**
23	**Closing Stock (30 Sep)**	**650 894**	**801 148**	**795 268**
24	- processed p/month	296 324	293 919	295 292
25	- months' stock	2	3	3
26	**- days' stock**	**67**	**83**	**82**

Appendix 4: Detailed S & D table for Sunflower Seed: October 2026

		Sunflower Seed	Sunflower Seed	Sunflower Seed
	Marketing season	**Final for 2024/25**	**Final for 2025/26**	**Projection for 2026/27**
		tons	**tons**	**tons**
1	CEC (Crop Estimate)	632 000	700 000	874 805
2	**SUPPLY**			
3	Opening stock (1 Mar)	127 144	72 789	49 266
4	Prod deliveries	634 451	708 635	874 805
5	Imports	1 423	68 326	7 000
6	Surplus	3 940	0	4 000
7	**Total Supply**	**766 958**	**849 750**	**935 071**
8	**DEMAND**			
9	**Processed**	**683 257**	**776 639**	**858 800**
10	- human	1 469	1 974	2 500
11	- animal	5 998	6 316	6 300
12	- crush (oil and oilcake)	675 790	768 349	850 000
13	Withdrawn by producers	8	67	80
14	Released to end-consumers	39	46	70
15	Seed for planting purposes	3 023	2 889	3 500
16	Net receipts(-)/disp(+)	205	2 684	300
17	Deficit	0	2 779	0
18	Exports	7 637	15 380	300
19	**Total Demand**	**694 169**	**800 484**	**863 050**
20	**Ending Stock (28/29 Feb)**	**72 789**	**49 266**	**72 021**
21	- processed p/month	56 732	56 858	71 567
22	- months' stock	1,3	0,8	1,0
23	**- days' stock**	**39**	**23**	**31**

Appendix 5: Detailed S & D table for Soybeans: October 2026

		Soybeans	Soybeans	Soybeans
	Marketing season	**Final for 2024/25**	**Final 2025/26**	**Projection for 2026/27**
		tons	**tons**	**tons**
1	CEC (Crop Estimate)	1 848 000	2 800 000	3 010 175
2	Retention	40 000	46 500	55 000
3	**SUPPLY**			
4	Opening stock (1 March)	320 637	140 704	286 120
5	Prod deliveries	1 808 548	2 749 322	2 955 175
6	Imports for South Africa	154 288	12 249	4 000
7	Surplus	6 471	423	10 000
8	**Total Supply**	**2 289 944**	**2 902 689**	**3 255 295**
9	**DEMAND**			
10	**Processed**	**1 988 082**	**2 359 154**	**2 603 000**
11	- human	22 424	20 764	21 000
12	- animal feed (full fat soya)	109 652	128 497	122 000
13	- crush (oil/oilcake)	1 856 006	2 209 893	2 460 000
14	Withdrawn by producers	582	167	220
15	Released to end-consumers	304	157	160
16	Seed for planting purposes	7 453	9 119	9 800
17	Net receipts(-)/disp(+)	2 574	1 028	900
18	Deficit	0	0	0
19	Exports	150 245	246 953	400 000
20	**Total Demand**	**2 149 240**	**2 616 578**	**3 014 080**
21	**Closing Stock (28/29 Feb)**	**140 704**	**286 120**	**241 215**
22	- processed p/month	165 674	196 596	216 917
23	- months' stock	0,8	1,5	1
24	**- days stock**	**26**	**44**	**34**

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South African Supply and Demand Estimates

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For further clarification pertaining to the definitions of the selected items contained in the South African Supply and Demand Estimates (SASDE) Report, kindly visit: https://www.namc.co.za/wp-content/uploads/2020/03/Definitions-for-selected-items-of-the-SASDE-Report-revised-March-2020.pdf

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- Members must regard the detail of any information that was collected for and/or discussed during the meeting, as confidential.

Compiled by the South African Grain & Oilseeds Supply & Demand Estimates Committee

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