

PRODUCTION CONDITION REPORT

18 March 2026



Gewas toestand
Crop Condition



Klimaat
Climate



Vergelyk
Compare



Opbrenge potensiaal
Production potential



Gewas opkoms
Greenup



Kaarte
Maps



Verslae
Report

Index

1. DEFINITIONS
2. FINAL AREA PLANTED
3. SUMMARY
4. RAINFALL
5. SOIL WATER INDEX
6. CROP GREENUP
7. GREEN LEAF INDEX

Definitions

- **Soil Water Index (SWI):**

This represents an overview of the soil water percentage throughout the growing season. It compares three periods: the current season, the previous season, and the 5-year average. This average serves as a baseline, indicating typical soil water conditions.

- **Green Leaf Indicator (GLI):**

Values over the growing season, illustrating the patterns of crop growth during the season.

- **Greenup:**

Crop green-up measures crop emergence and canopy development over time, showing how current growth compares to the 5-year average

- **Crop conditions**

Crop conditions describe the overall health and yield potential of crops, based on rainfall, soil moisture, and environmental stress factors.

All the 2025/26 season data is from 1 July 2025 to 18 March 2026.

Final Area Planted

SUMMARY: FINAL AREA PLANTED AND CROP PRODUCTION FIGURES OF COMMERCIAL SUMMER CROPS FOR 2025:

CROP	FINAL AREA PLANTED 2025 HA (A)	FINAL CROP ¹⁾ 2025 TONS (B)	CEC AREA PLANTED NOV 2025 HA (C)	CEC FINAL ESTIMATE ²⁾ NOV 2025 TONS (D)	FINAL CROP vs FINAL ESTIMATE % (B) ÷ (D)
White Maize	1 599 700	8 450 000	1 599 700	8 378 250	+0,86
Yellow Maize	997 000	8 200 000	997 000	8 057 400	+1,77
Total Maize	2 596 700	16 650 000	2 596 700	16 435 650	+1,30
Sunflower seed	555 700	700 000	555 700	708 300	-1,17
Soybeans	1 151 000	2 800 000	1 151 000	2 771 225	+1,04
Groundnuts	48 125	63 350	48 125	62 474	+1,40
Sorghum	41 150	150 000	41 150	146 605	+2,32

1) For ease of reference, projected figures have been rounded to the nearest 1 000 tons.

2) As estimated by the CEC on 27 November 2025

Source: CEC



Summary

Crop Conditions

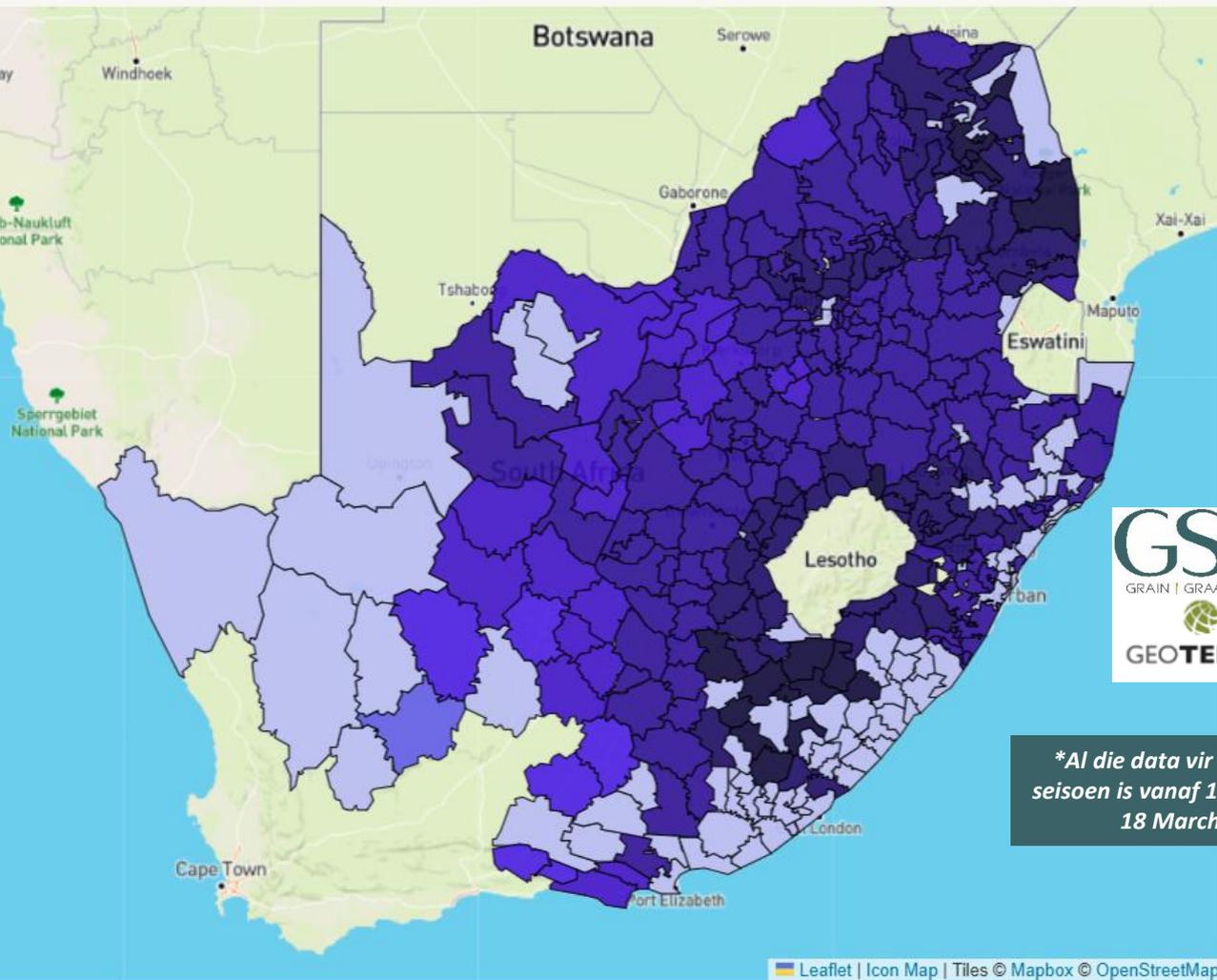
Crop conditions across the summergrain regions are generally favourable, although variability remains due to earlier drought and uneven rainfall distribution. The Free State shows favourable conditions, supported by consistent rainfall and good soil moisture, with positive yield expectations despite some early maize being affected by the January dry spell. The Eastern Highveld is also performing well, with crops at mixed stages and later plantings showing good potential following recent rains. In Limpopo, conditions are more mixed, as below-average and uneven rainfall has led to moisture stress in the southern areas, negatively affecting crops such as maize and groundnuts. The North West has seen improvement following recent rainfall, with many crops recovering and some areas expecting above-average yields; however, uneven rainfall and pest pressure continue to create localised challenges. Overall, recent rainfall has supported recovery and improved conditions, but variability in rainfall timing and distribution continues to influence yield potential. Therefore, more follow-up rain in the next few weeks is needed to realise the projected production figures.

The 2nd CEC Production Forecast will be released on the 26th of March.

Total Rainfall

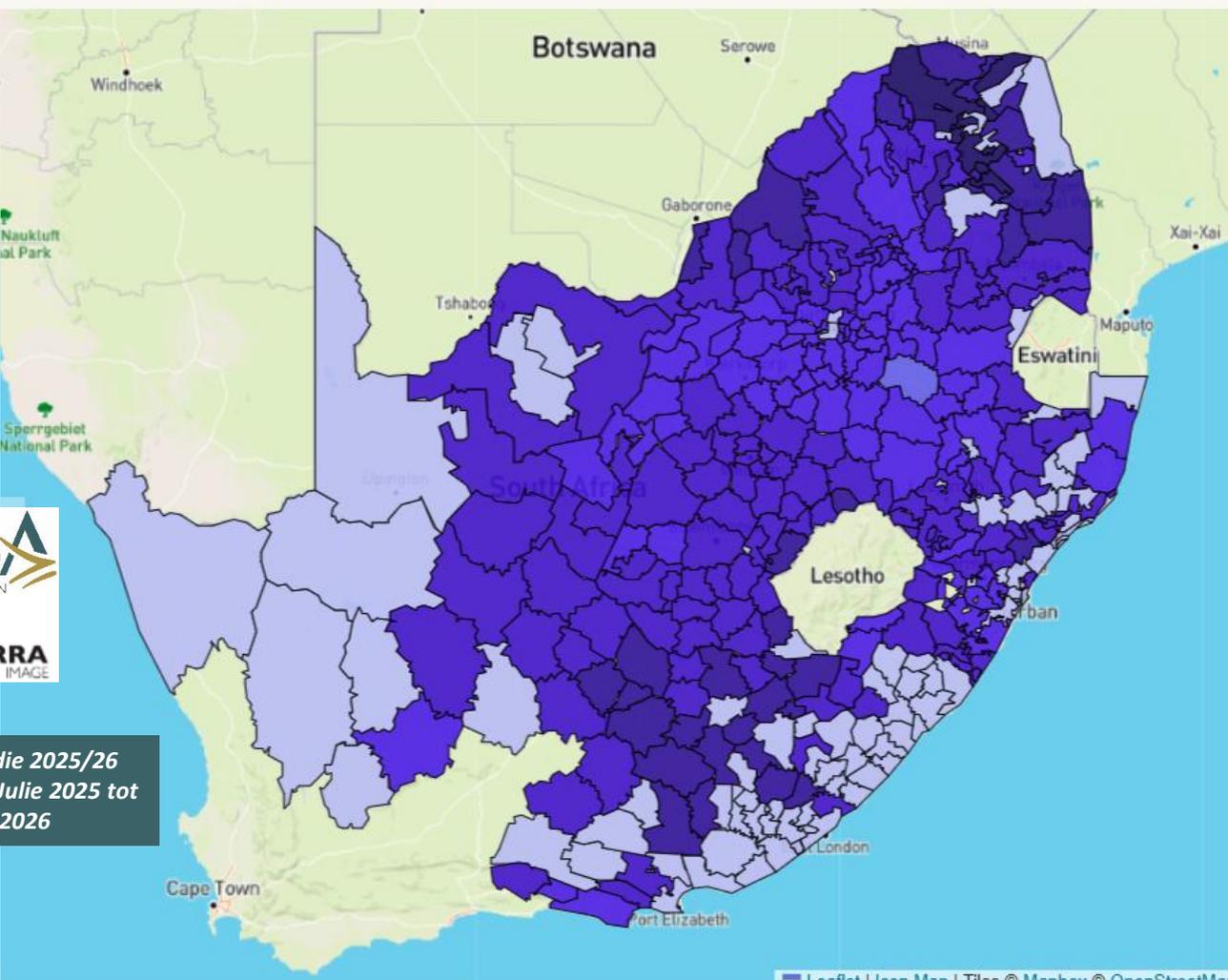
Totale Reënval/Total Rainfall

Reënval vir die afgelope 30 dae/Rainfall for the past 30 days



**Al die data vir die 2025/26 seisoen is vanaf 1 Julie 2025 tot 18 March 2026*

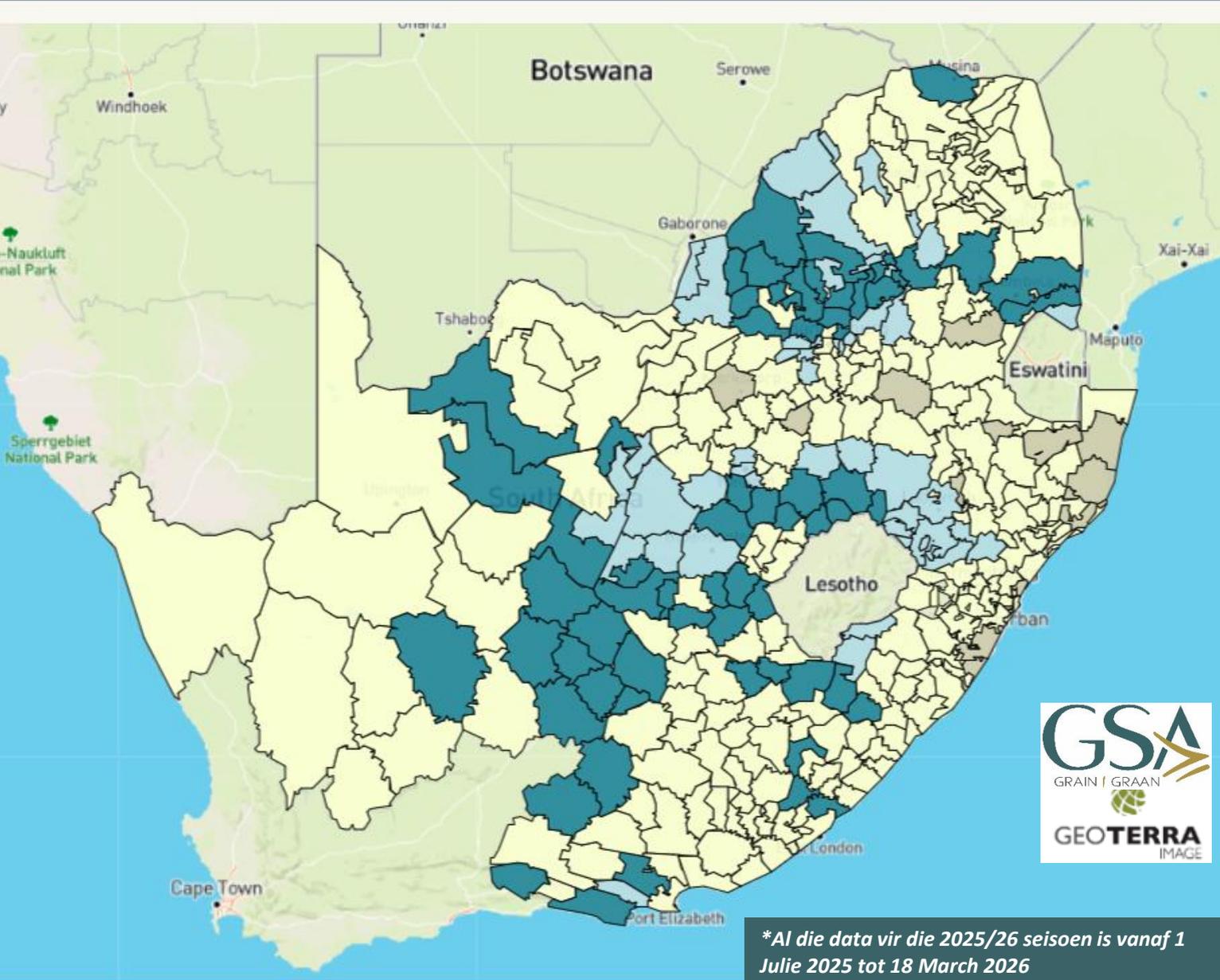
Leaflet | Icon Map | Tiles © Mapbox © OpenStreetMap



Leaflet | Icon Map | Tiles © Mapbox © OpenStreetMap

0-50 mm	50-100 mm	100-200 mm	200-300 mm	300-400 mm	400-600 mm	600-800 mm	>800 mm	0-10 mm	10-25 mm	25-50 mm	50-75 mm	75-125 mm	125-175 mm	175-250 mm	>250 mm
---------	-----------	------------	------------	------------	------------	------------	---------	---------	----------	----------	----------	-----------	------------	------------	---------

Seisoen reënval afwyking/Season rainfall deviation



*Al die data vir die 2025/26 seisoen is vanaf 1 Julie 2025 tot 18 March 2026

Baie Laag Very Low	Middelmatig laag Moderately Low	Effens Laag Slightly Below	Normaal Normal	Effens Hoog Slightly Above	Middelmatig Hoog Moderate Higher	Baie Hoog Well Above
-----------------------	------------------------------------	-------------------------------	-------------------	-------------------------------	-------------------------------------	-------------------------

Rainfall patterns over the past few weeks have played a critical role in shaping crop conditions across the summer rainfall regions, with generally positive outcomes where moisture was sufficient, but continued variability in drier areas.

Free State:

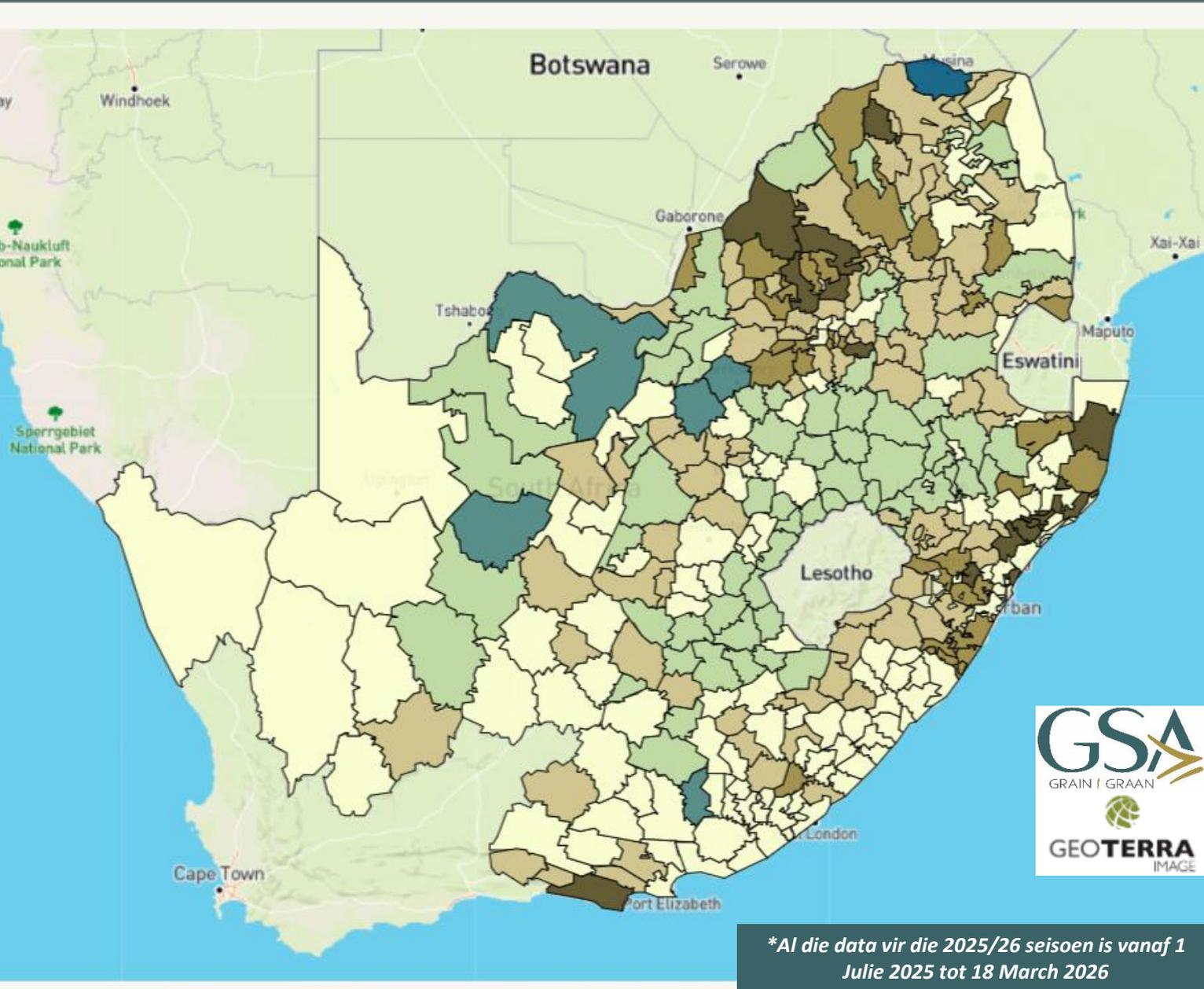
- ❑ **Northwest Free State:** Good rainfall has been recorded in areas such as Bethlehem and Fouriesburg over the past two weeks. Conditions are reported to be wet, with sustained rainfall contributing to favourable production conditions.
- ❑ **Eastern Free State:** Consistent and well-distributed rainfall has been recorded over the past few weeks, particularly in areas such as Hoopstad, Bothaville, and Wesselbron. Weekly rainfall of approximately 40 mm has been recorded in parts of the region, which has improved production conditions.

Limpopo: Rainfall has been below average and unevenly distributed over the past 7-8 weeks from Springbokvlakte extending to the southern part of the province. While some areas received isolated rainfall between 30 mm and 40 mm, this was not widespread enough to improve overall conditions. Large variability exists between farms, with some receiving meaningful rainfall while others remain dry.

Eastern Highveld: Good rainfall has been recorded across much of the region during March, particularly in areas such as Amersfoort, Ermelo, and Bergville. Recent follow-up rains of approximately 12-15 mm have further supported crop development and soil moisture replenishment. These rains were particularly beneficial for later-planted crops, which required moisture during critical growth stages following earlier dry conditions.

North West Province: Rainfall received over the past two weeks has contributed positively to crop conditions across parts of the province extending from Lichtenburg, Mareetsane and Sannieshof. However, rainfall distribution remains uneven, with some areas receiving adequate moisture while others experience little to no rainfall.

Grondvog Indeks / Soil Water Index



*Al die data vir die 2025/26 seisoen is vanaf 1 Julie 2025 tot 18 March 2026



The soil moisture index compares current conditions with both the previous season and the 5-year average.

Free State

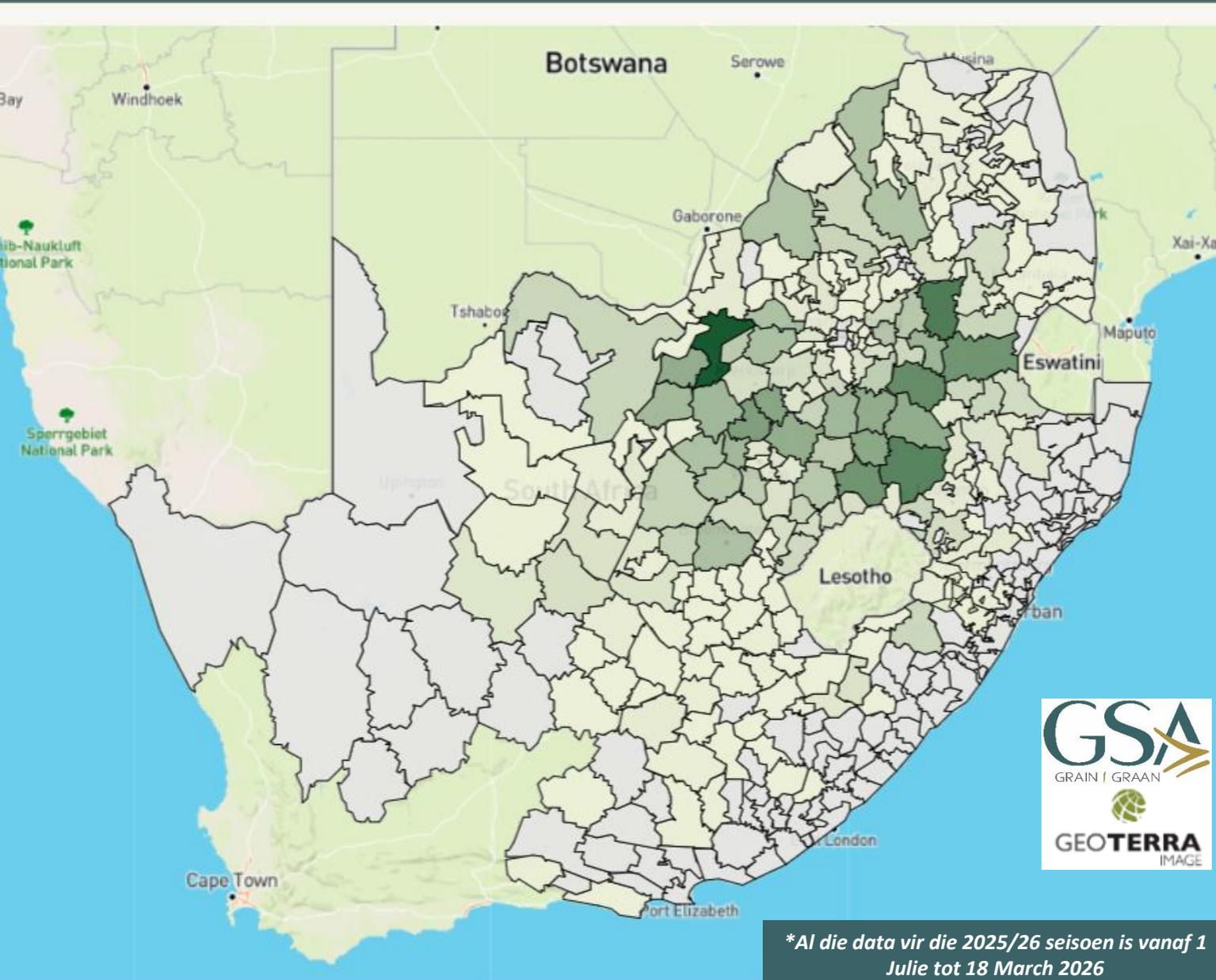
- ❑ **Northwest Free State:** Soil moisture levels have improved following consecutive rainfall events, with soil profiles now well replenished
- ❑ **Eastern Free State:** Soil moisture levels are reported to be very good, with wet conditions prevailing across much of the region. The consistent rainfall has maintained adequate soil water availability, particularly benefiting early planted crops

Limpopo: Soil moisture levels remain low across much of the province due to below-average rainfall. Sandy soils are particularly vulnerable, as they have a lower water-holding capacity and lose moisture quickly under hot conditions. This continues to place stress on crops, particularly where follow-up rainfall has not occurred.

Eastern Highveld: Soil moisture levels are currently good to very good following rainfall received during March. The region is generally reported to be wet, with sufficient moisture available to support crop development. However, earlier dry conditions during the season resulted in reduced soil moisture for early planted crops, which may still reflect some stress effects.

North West: Soil moisture conditions have improved in areas that received rainfall, contributing to crop recovery from earlier drought stress. The recent rainfall has helped replenish soil moisture and improve water availability for crops currently in reproductive stages. However, variability remains a key concern.

Gewasopkoms per Distrik / Crop Greenup per District



*Al die data vir die 2025/26 seisoen is vanaf 1 Julie tot 18 March 2026

The crop green-up indicators highlight current crop emergence and canopy development relative to the 5-year average.

Free State

- ❑ **Northwest Free State:** Crop green-up has improved following recent rainfall, with good canopy development observed across the region. Improved soil moisture conditions have supported vegetative growth.
- ❑ **Eastern Free State:** Good green-up is evident across the region, particularly in early-planted crops. The combination of consistent rainfall and adequate soil moisture has supported good canopy development, with crops showing healthy growth.

Limpopo: Crop green-up remains limited and uneven due to prolonged dry conditions and below-average rainfall. Vegetative growth has been constrained in many areas, particularly on sandy soils where moisture retention is poor. While some fields have responded to isolated rainfall events, overall canopy development remains below optimal levels.

Eastern Highveld: Good green-up has been observed across the region following recent rainfall. Crops are at mixed growth stages, with some fields approaching maturity while others remain actively developing. Later-planted crops have shown particularly good canopy development due to improved moisture conditions. Soybeans, currently in R4 to R5 stages in some areas, are showing good vegetative growth and canopy cover

North West: Crop green-up has improved following recent rainfall, with visible recovery in canopy development after earlier drought conditions. Crops are progressing through reproductive and grain-filling phases. However, green-up remains uneven due to variability in rainfall distribution. Later-planted crops generally exhibit good canopy development, while early-planted crops reflect the impact of earlier moisture stress. In some areas, pest pressure, such as spider mites, may be affecting canopy health.

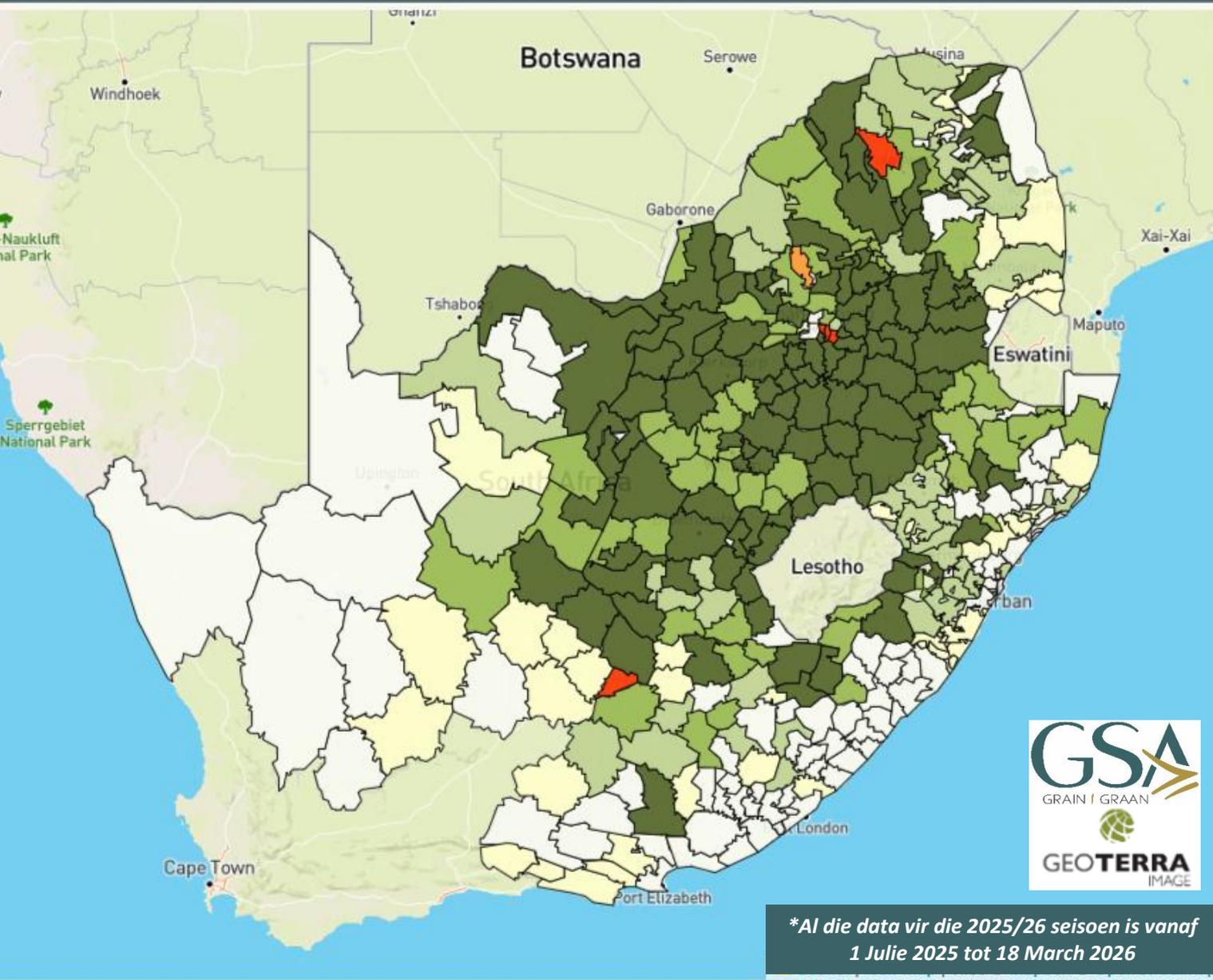


Laag
Low

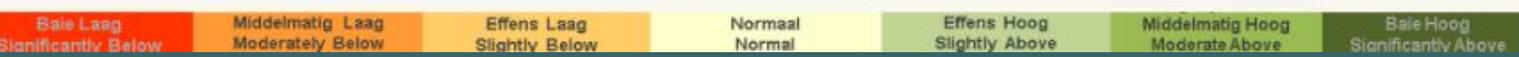
Middelmatig Hoog
Moderate Above

Hoog
High

Gewas Toestand / Crop Condition



*Al die data vir die 2025/26 seisoen is vanaf 1 Julie 2025 tot 18 March 2026



The Green Leaf Index reflects crop growth and development throughout the season, with conditions across most summer rainfall regions significantly above the 5-year average.

Free State

- ❑ **Northwest Free State:** Crop conditions in the region are reported to be very good following consistent rainfall. Producers expect favourable yields if favourable conditions continue.
- ❑ **Eastern Free State:** Production conditions remain favourable, particularly for early plantings. However, early maize in areas such as Warden was affected by the January drought and may yield slightly below average. Soybeans recovered well after late rains, and sunflower harvesting has started.

Limpopo: Crop conditions are mixed. In Springbokvlakte, conditions are generally fair, but below-average rainfall continues to constrain performance. In drier areas such as Nylstroom, crops are under heat and moisture stress. Groundnuts show poor pod filling, and maize growth is weak. Sorghum harvesting is expected soon. Late sunflowers require additional rainfall.

Eastern Highveld: Crop conditions are favourable following recent rainfall. Maize is at mixed stages, with some fields nearing harvest and others still developing with good potential. Soybeans are performing well, with some areas nearing harvest. Cooler temperatures are aiding the drying process.

North West: Crop conditions are generally favourable but variable. Maize has recovered from earlier drought stress and is in the grain-filling stages, with some fields nearing maturity. Sunflowers are progressing well, with harvesting already underway in some areas. Soybeans may deliver above-average yields. However, uneven rainfall has resulted in localised poor conditions, and early planted crops were more affected by drought. Pest pressure (spider mites) is an added concern.



THANK YOU!

Vir enige navrae / for any queries:

Grain SA

Marguerite@grainsa.co.za / Cathrine@grainsa.co.za / Gerrit@grainsa.co.za

Disclaimer: The information herein has been obtained from various sources, the accuracy and/or completeness of which Grain SA does not guarantee and for which Grain SA accepts no liability. Any prices or levels contained herein are preliminary and indicative only and do not represent bids or offers. These indications are provided solely for your information and consideration

GRAIN | GRAAN