

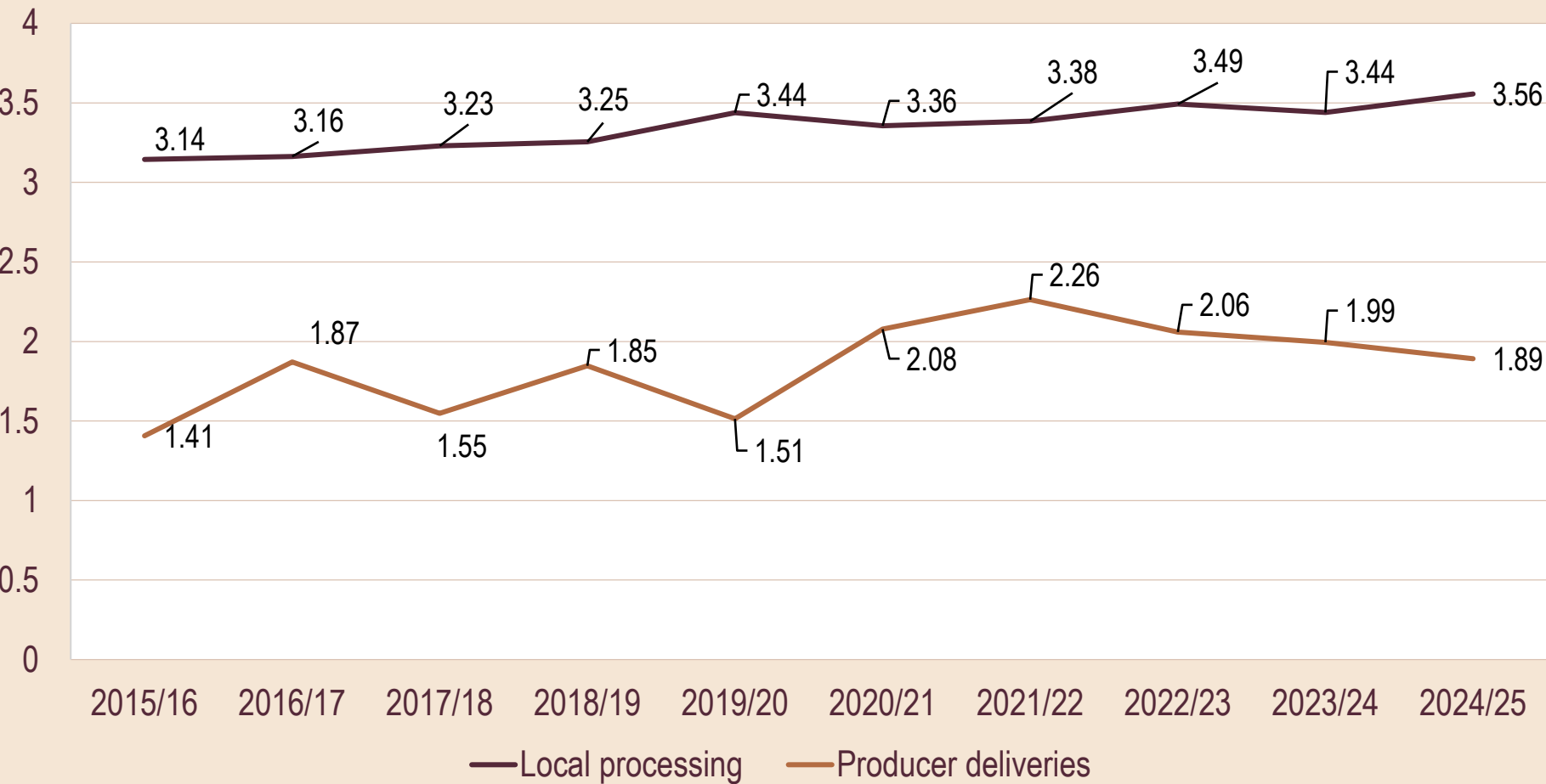
WHEAT FORUM

Bernard Schultz

SAGIS / 21 October 2026

Commercial deliveries cover a smaller share of processing

Full marketing years, October–September. Million tonnes.



53.2%

deliveries / processing
in 2024/25

66.9% in 2021/22

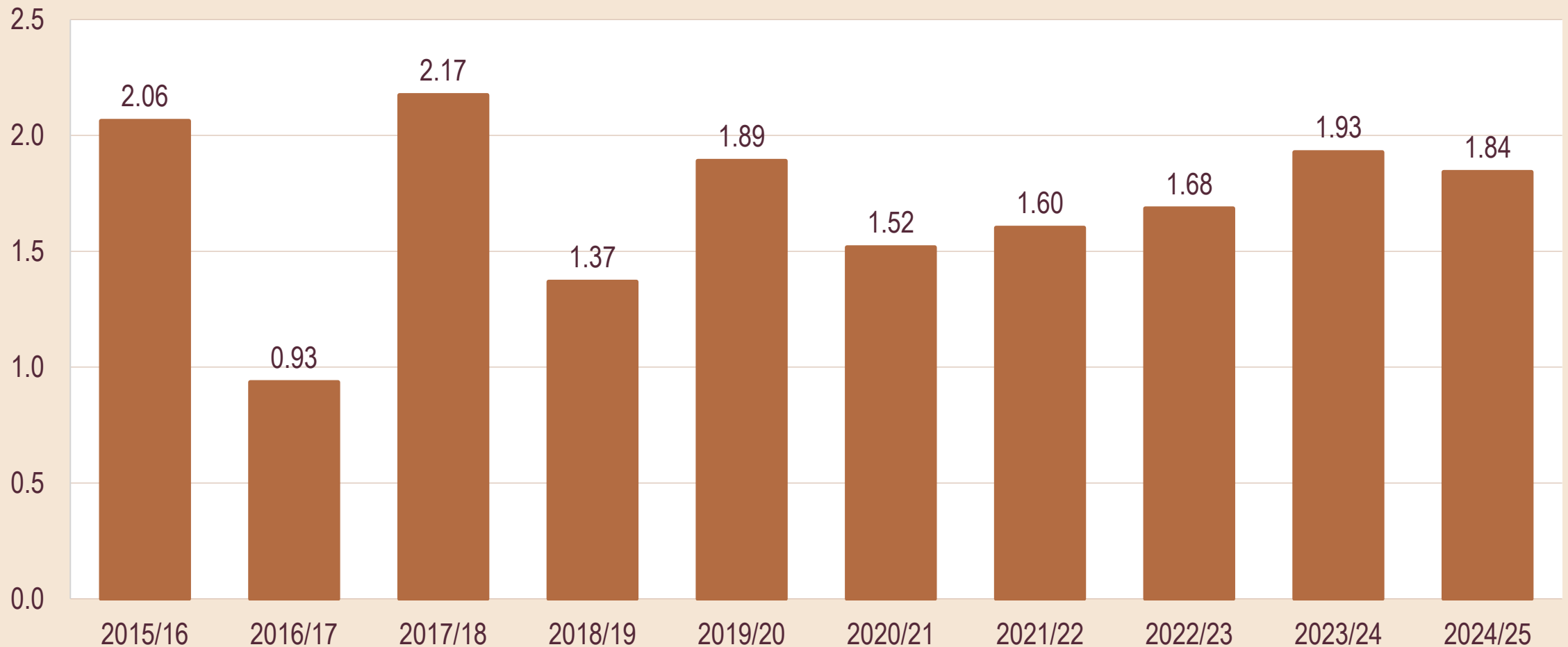
57.3% for October
2025 – August 2026

Category	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Producer	1 406 752	1 870 525	1 547 486	1 847 171	1 513 300	2 077 136	2 262 938	2 059 649	1 994 874	1 891 177
Processed for Local Market	3 144 414	3 163 196	3 229 861	3 254 656	3 437 768	3 355 869	3 384 445	3 491 898	3 439 625	3 555 889
Deliveries %	44.74	59.13	47.91	56.75	44.02	61.90	66.86	58.98	58.00	53.18



Imports for RSA remain large and variable

Full marketing years, October–September. Million tonnes.

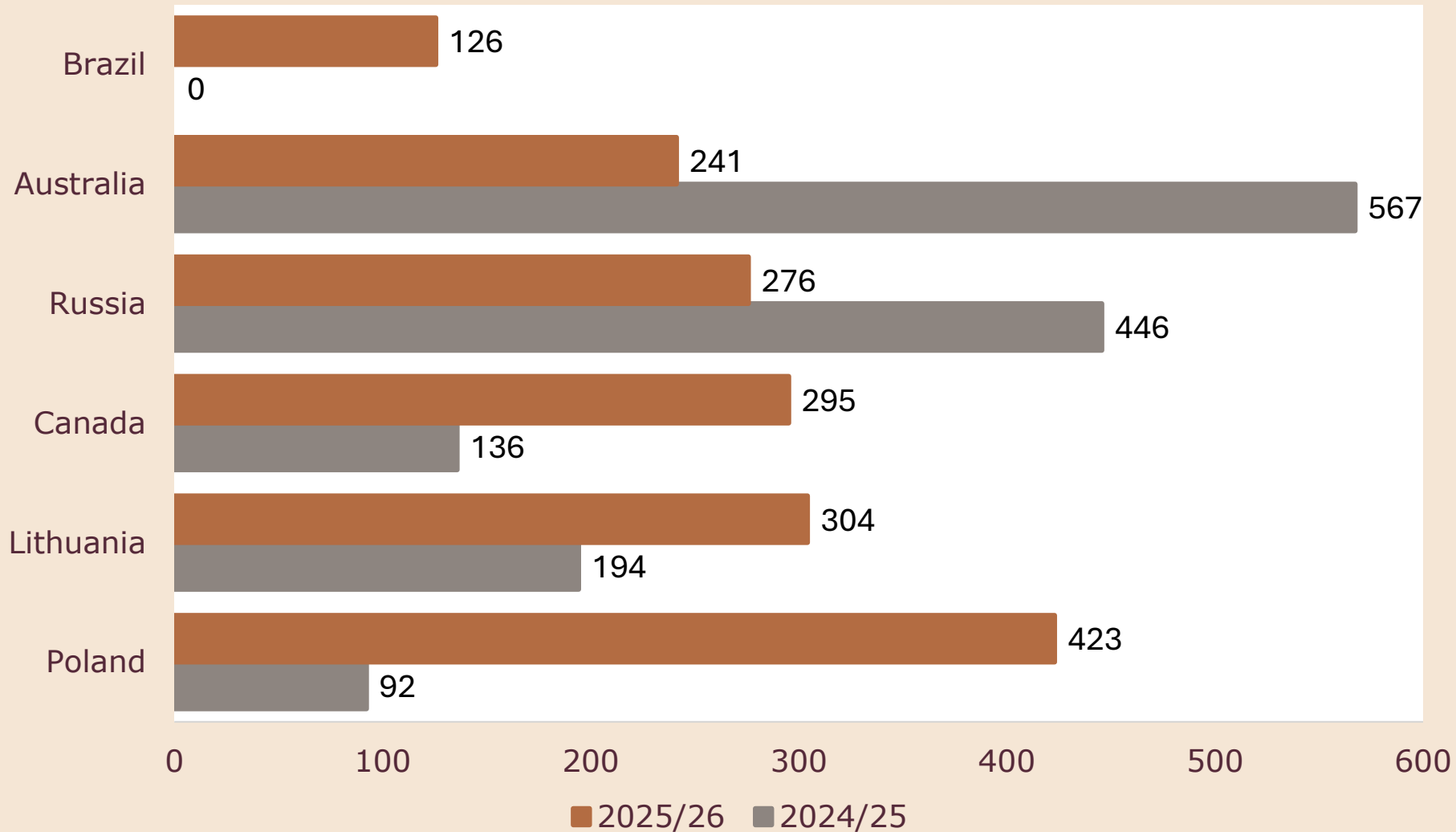


1.84 Mt in 2024/25, down 4.4% from 2023/24. The ten-season period spans 0.93 Mt to 2.17 Mt.

Weekly Import data totalled 1 941 431t for 2025/26 (Third highest since 2015/16)

Poland became the largest RSA supplier during 2025/26

Weekly imports for 2024/25 and 2025/26. Thousand Tonnes



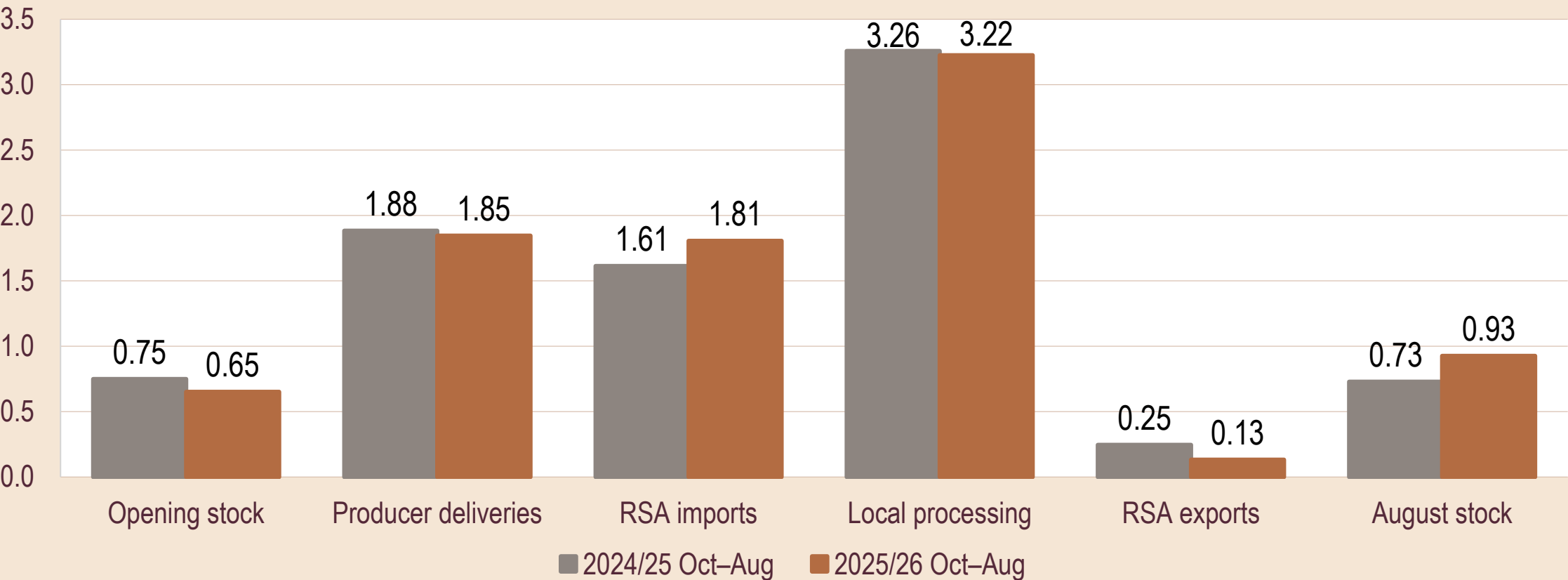
21.8%

Poland's share
up from 5.0%

Australia fell from
30.8% to 12.4%.

August stocks rose despite lower opening stocks

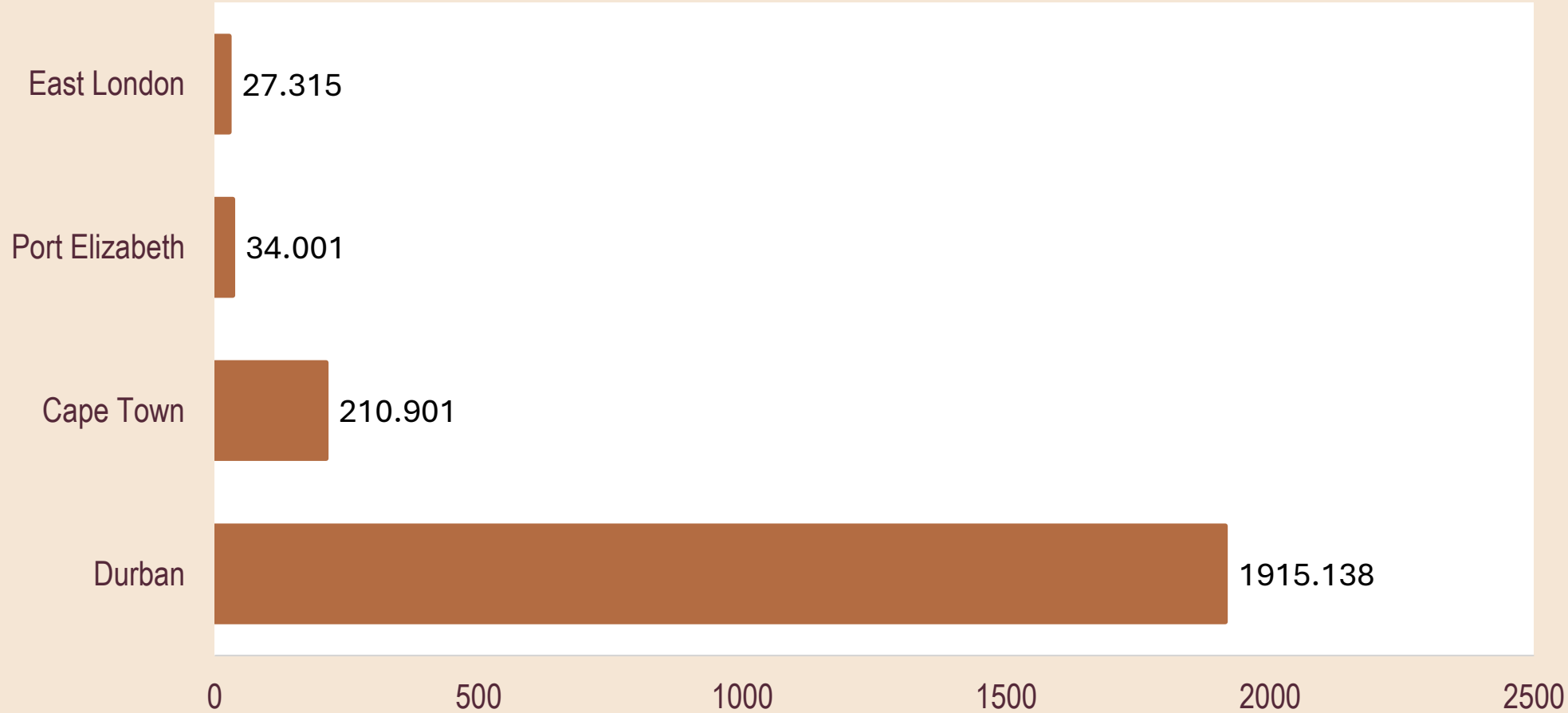
Monthly whole wheat. October–August. Million tonnes.



Deliveries -2% | Imports +12.0% | Processing -1.0% | RSA exports -46.3%
August stock +27.2% to 926,442 tonnes

Durban handled 87.6% of total reported imports

SAGIS weekly imports per harbour. 2025/26 reported season total. Thousand tonnes



2.187 Mt

total port imports

1.941 Mt for RSA
0.246 Mt for other
countries

RSA wheat exports fell

Weekly Exports. Thousand tonnes.



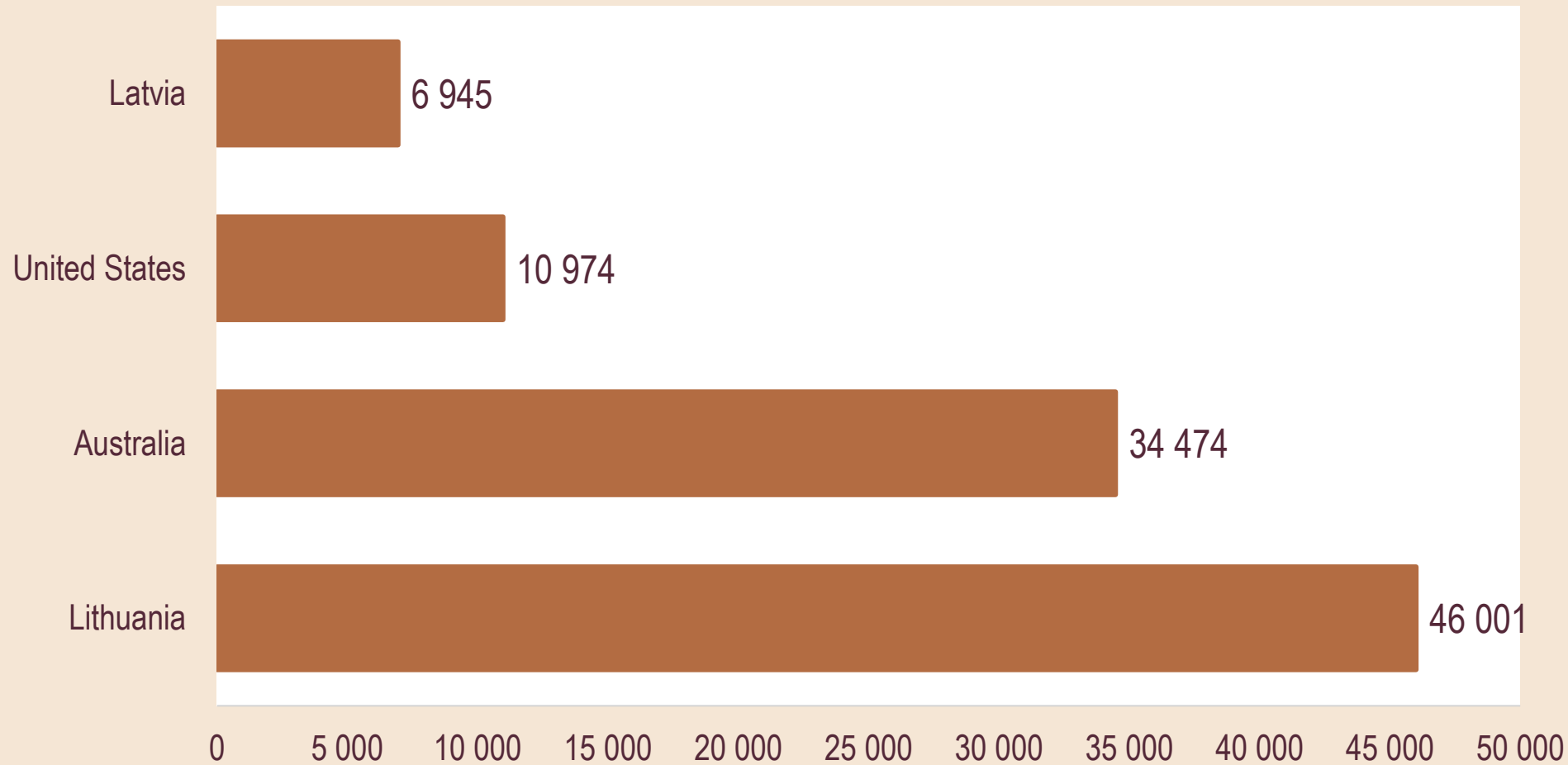
-53.2%

RSA wheat
exports

Imported-wheat
exports fell
11.2%.

The new marketing year opened with 98 394 tonnes imported for RSA

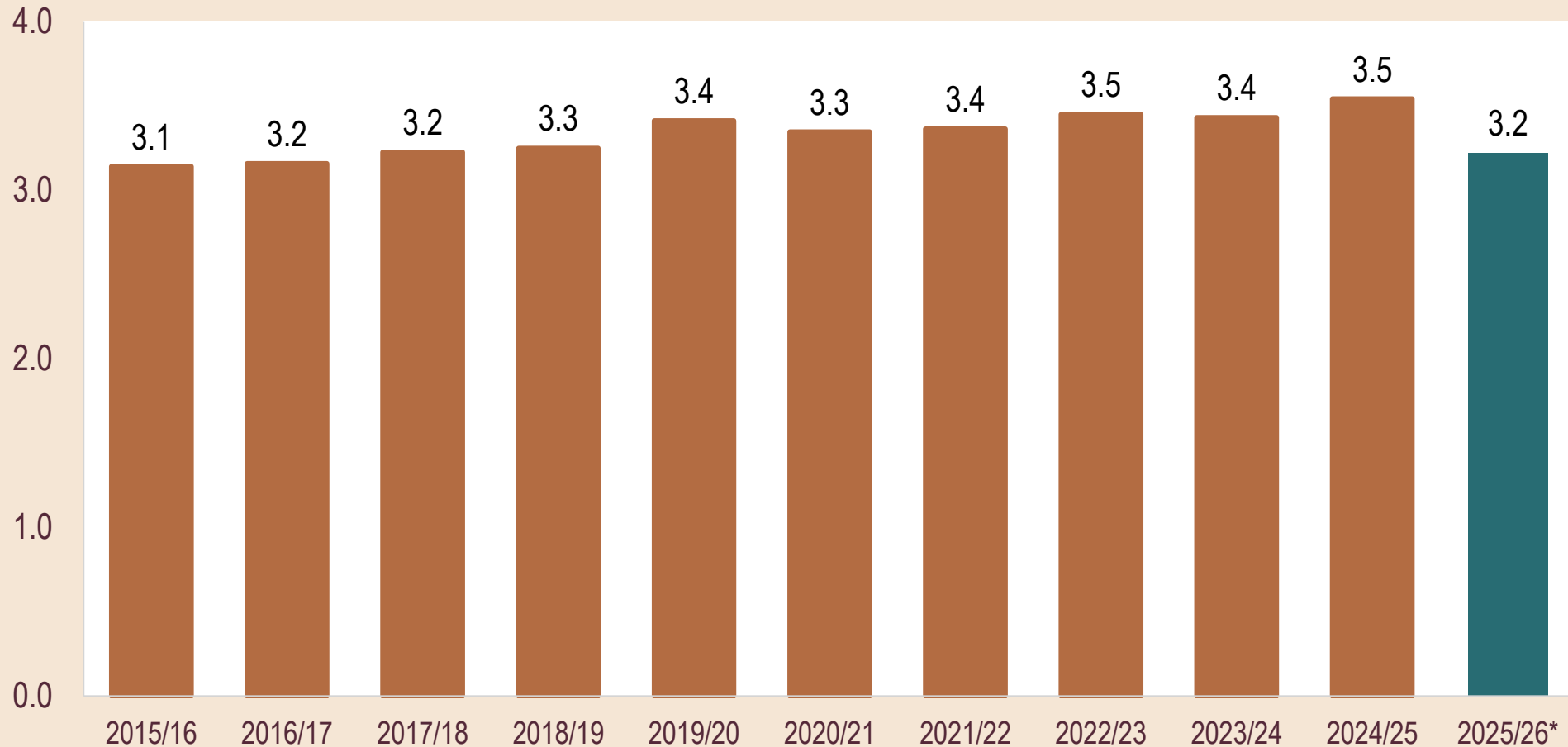
SAGIS weekly imports. Weeks 1–2 ending 9 October 2026.



46.8%
Lithuania's opening
share

Human-consumption processing rose over ten years

Processing 2015/16–2025/26*. Million tonnes.



+12.8%

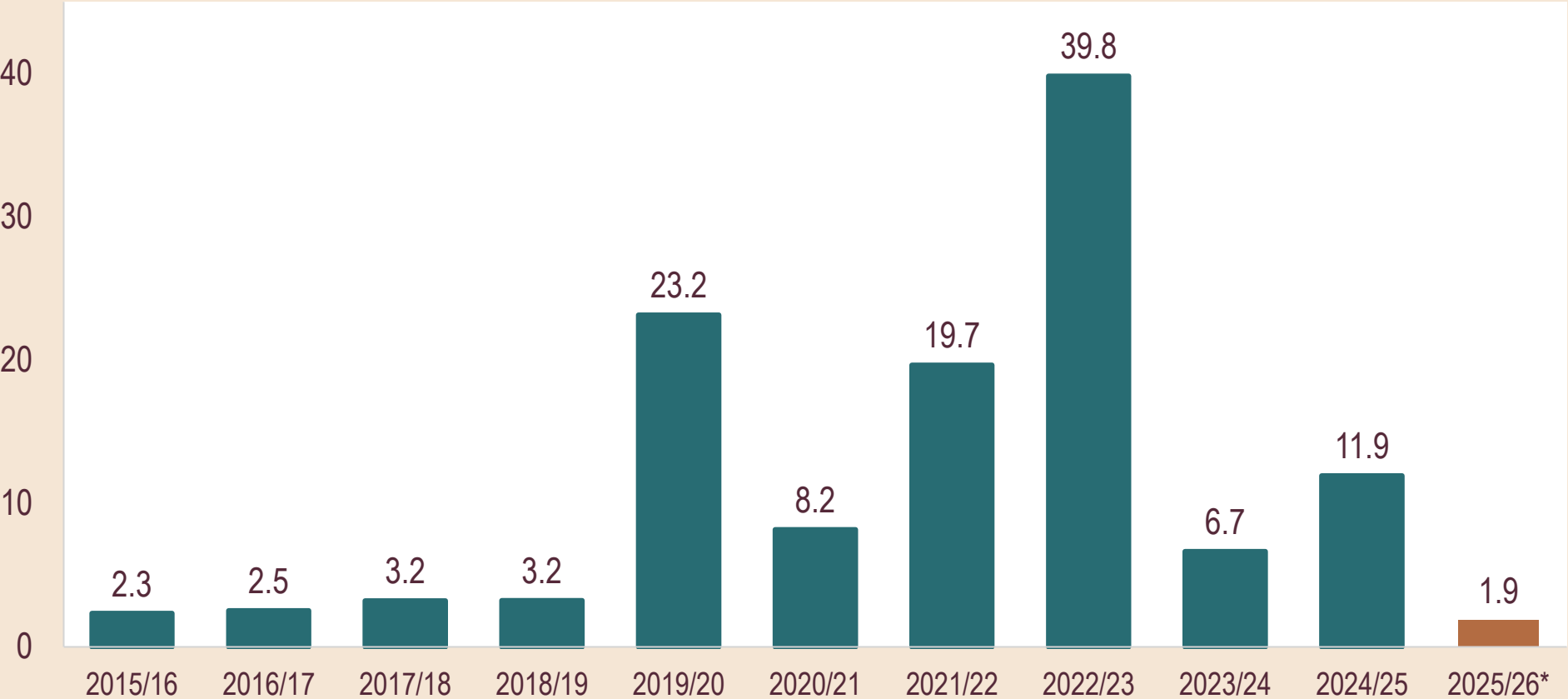
2015/16 to 2024/25
3.142 Mt to 3.544 Mt

2025/26 Oct–Aug
3.223 Mt
–0.7% year on year

*2025/26: October–August (11 months).

Animal-feed processing fluctuated sharply

Processed for animal feed, 2015/16–2025/26*. Thousand tonnes.



39 828 t

peak in 2022/23.

Reached 11 949 t in
2024/25

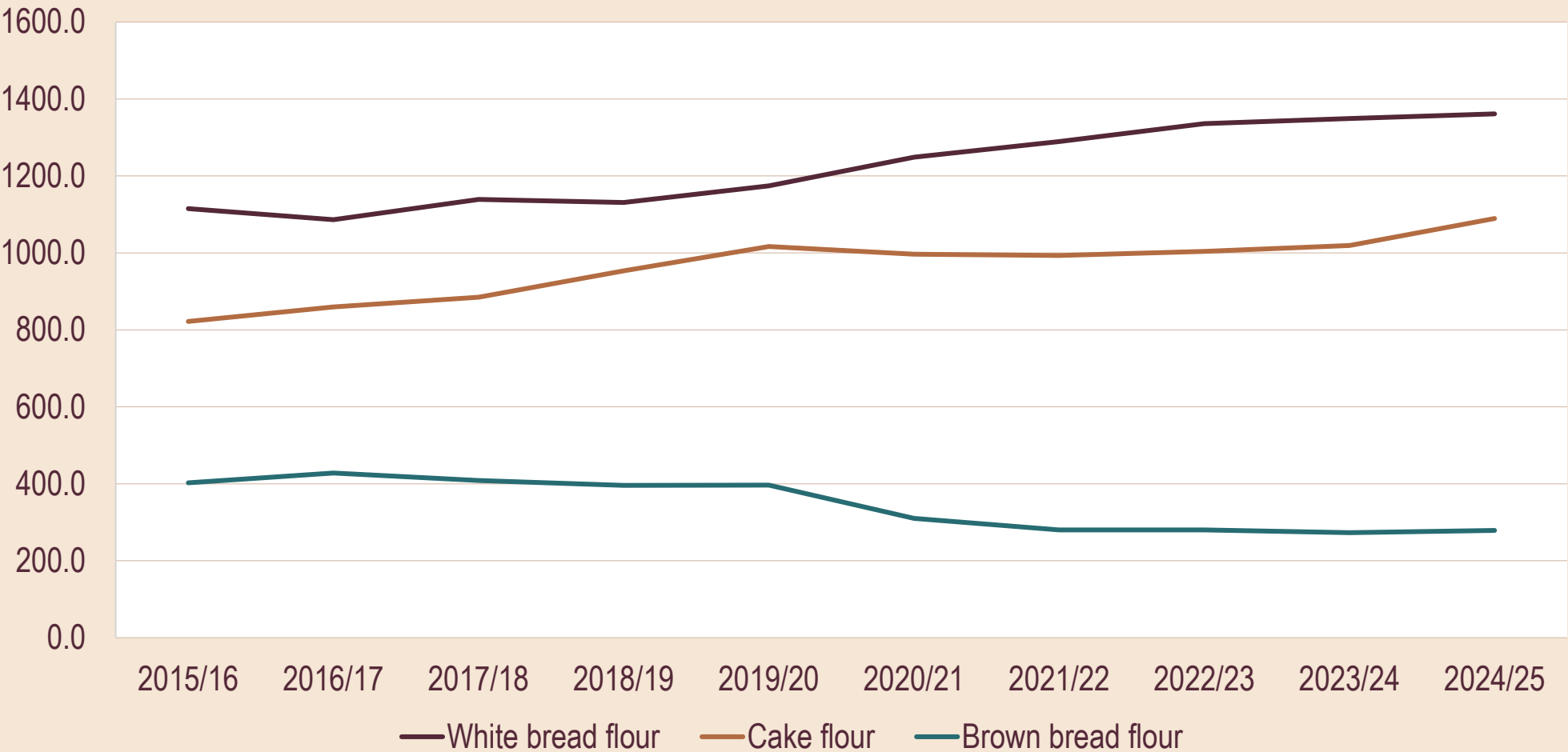
2025/26 Oct–Aug
1,870 t
–83.7% year on year

*2025/26: October–August (11 months).

PRODUCT DATA

White bread flour and cake flour gained over the last ten years

Wheat Flour - Completed seasons. Thousand tonnes.



+32.5%

Cake flour
2015/16 to
2024/25

White bread flour
+22.1%

Brown bread
flour **-30.7%**

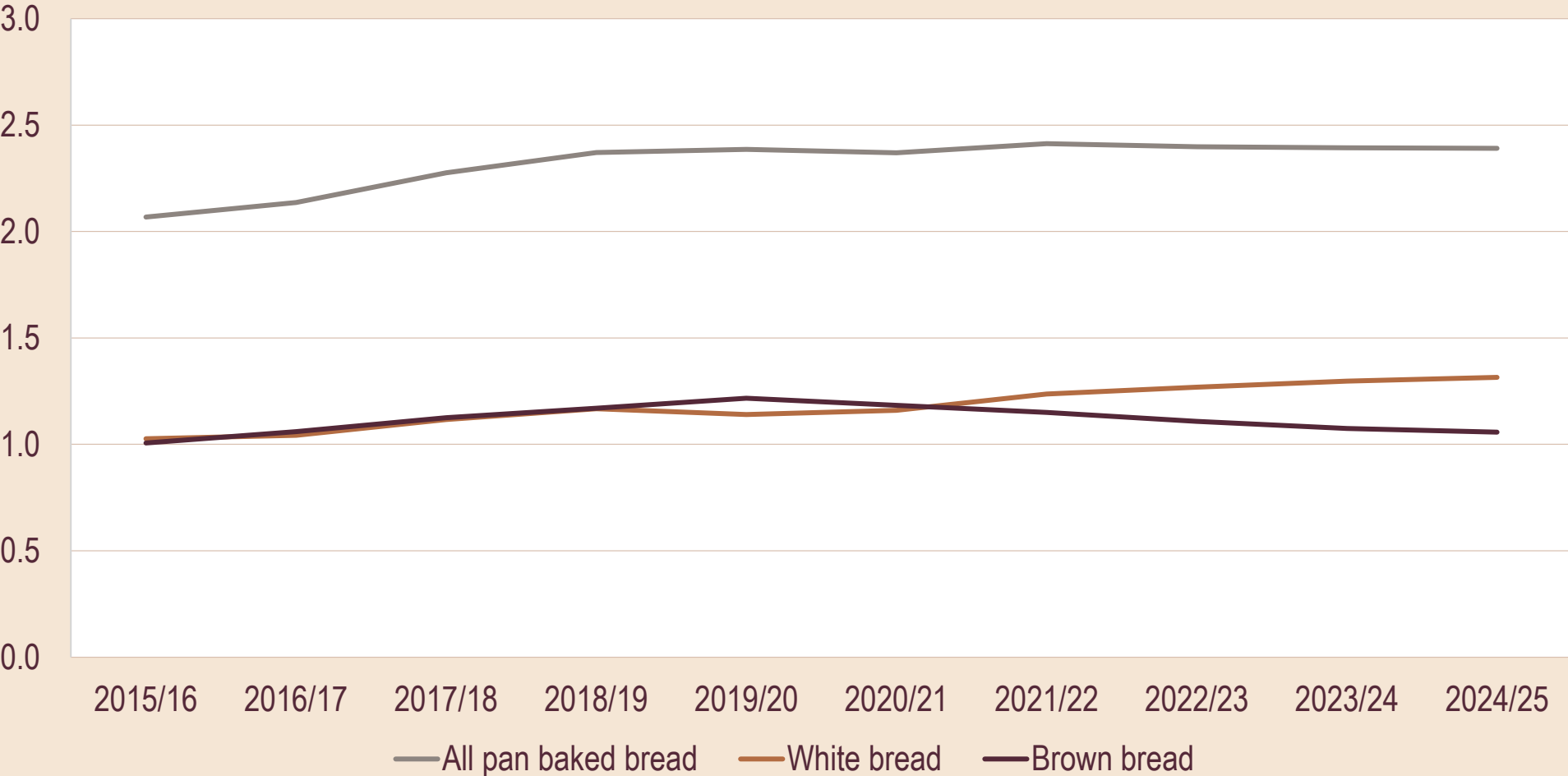
Flour categories have different growth patterns

Products Manufactured, October–August. Tonnes

Category	2024/25 Oct–Aug	2025/26 Oct–Aug	Change
Cake flour	993 714	988 948	-0.5%
Self-raising flour	15 592	15 005	-3.8%
White bread flour	1 245 193	1 284 952	+3.2%
Brown bread flour	257 111	253 445	-1.4%
Other industrial flour	107 295	115 054	+7.2%
Whole wheat meal	5 052	7 172	+42.0%
Bran	661 117	681 598	+3.1%
Semolina	4 208	3 725	-11.5%

Total bread manufactured evened out while white bread gained

Pan baked. Completed seasons. Billion units.



2.391 bn

units in 2024/25

White share rose from 49.6% to 55.0%
From 2015/16 to 2024/25

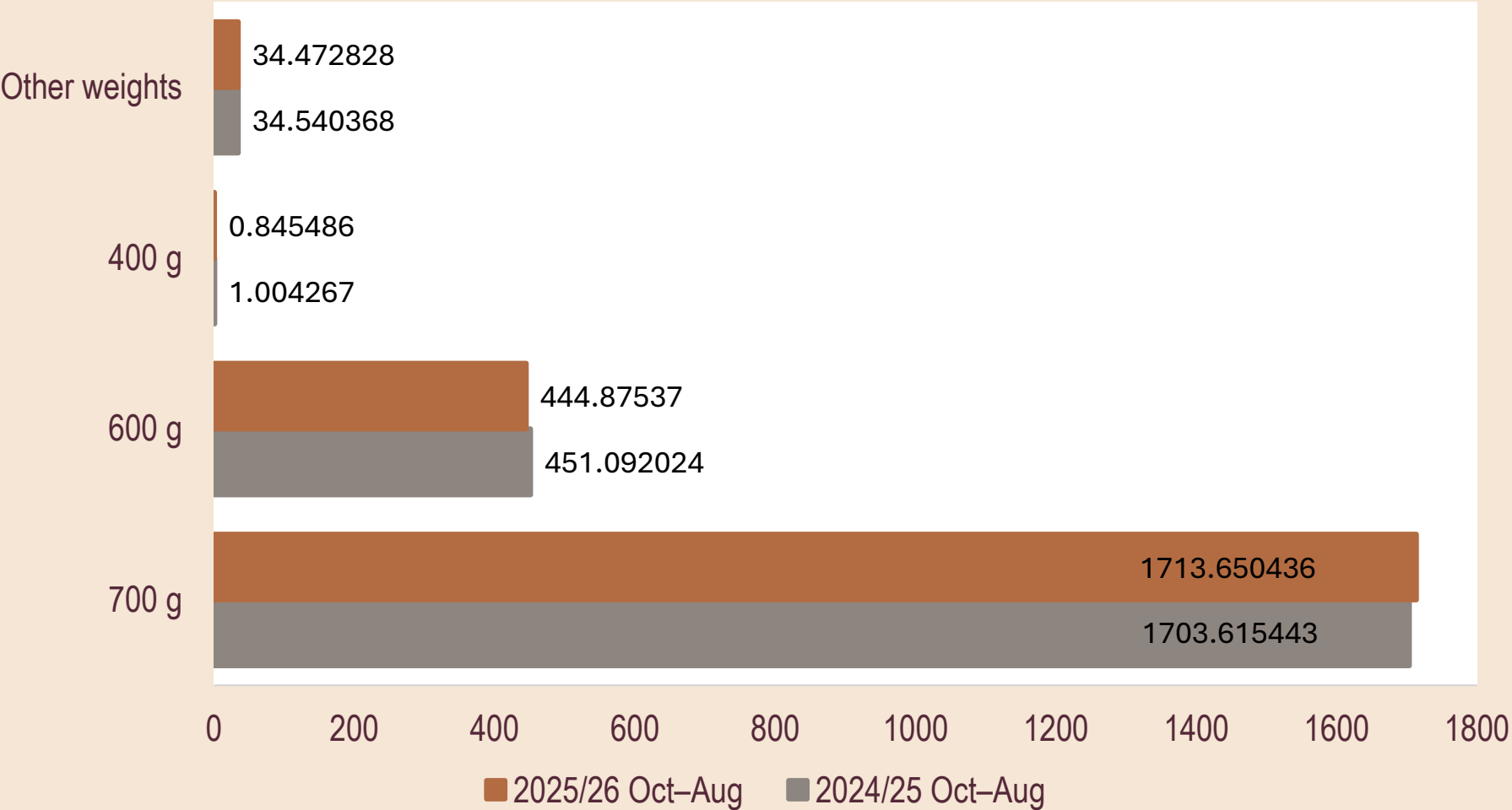
2.194 bn

units in 2025/26
(Oct – Aug)

White: 1.219 bn
Brown: 958 mil
Whole Wheat: 16 mil

The 700 g loaf dominates reported bread units

Pan baked products. All bread types combined, October–August. Million Units



78.1%

700 g share of all units

700 g units +0.6%

600 g units –1.4%

Gratitude

- SAWCIA
- Wheat Forum
- Relevant Associations
- Co-workers & staff