



## WESTERN CAPE AGRICULTURE & AGRI-PROCESSING EMPLOYMENT PERFORMANCE: 1<sup>ST</sup> QUARTER OF 2025

### 1. Introduction

This report analyses the agricultural labour market performance in the Western Cape, based on the first quarter labour force survey statistics for 2025 (Q1\_2025) from Statistics South Africa. With emphasis on the agriculture and Agri-processing sectors. The next section will present an overview of the employment and performance of various sectors in this quarter (Stats SA, 2025), followed by a detailed discussion of jobs in agriculture and agri-processing sectors.

### 2. Overview of employment

Table 1 presents employment numbers by sector in the Western Cape (WC), along with their growth rates, and each sector's contribution to total employment. The largest sector by employment in the province is the financial services sector, which accounts for 21% of total with 594 797 jobs. This is followed by Community & social services at 20% (575 863 jobs) and Trade at 17% (491 922). Notably, the provincial employment grew by 2% quarter-on-quarter (q/q) and 4% on a year-on-year (y/y) basis.

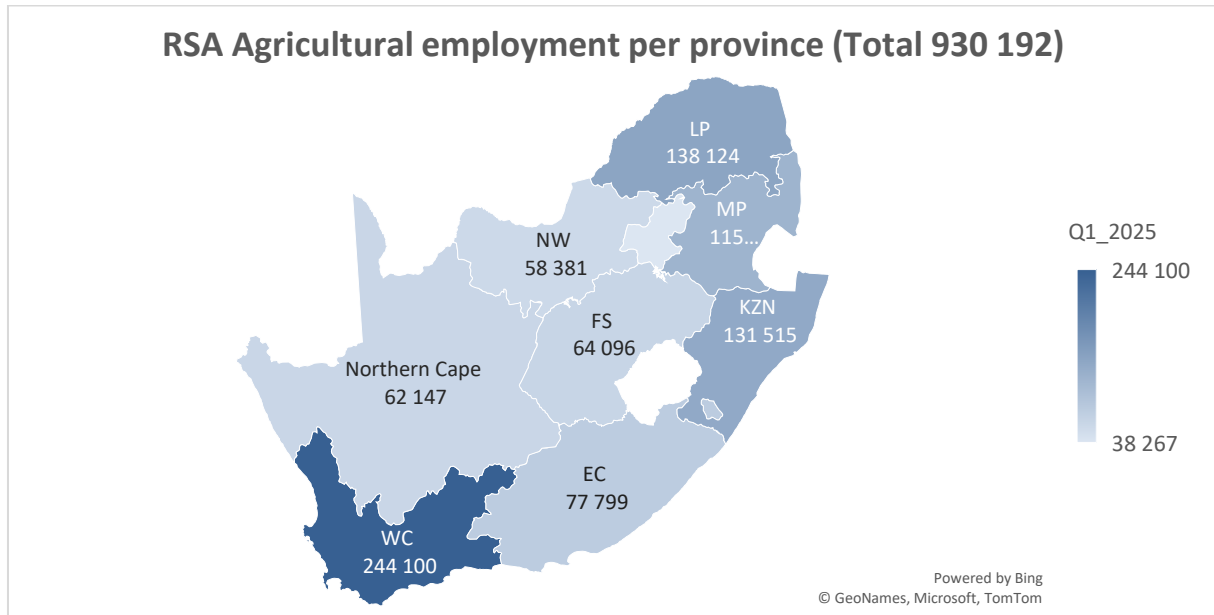
**Table 1: Western Cape first quarter 2025 labour market performance per sector**

Sectors	Jobs (Jan-Mar 2025)	q/q % change	y/y % change	Relative share (Q1_2025)
Finance	594 797	1%	9%	21%
Community and social services	575 863	-5%	7%	20%
Trade	491 922	-3%	-6%	17%
Construction	244 845	0%	3%	9%
Agriculture	244 100	27%	13%	8%
Other manufacturing (excl. food, beverage, and tobacco)	241 841	2%	4%	8%
Transport	194 974	6%	15%	7%
Private households	158 374	0%	-16%	5%
Agri-processing (Food, beverage and tobacco)	115 528	-4%	-7%	4%
Utilities	11 247	8%	12%	0%
Mining	6 117	-39%	-2%	0%
<b>TOTAL</b>	<b>2 879 609</b>	<b>1%</b>	<b>3%</b>	<b>100%</b>

Source: (Stats SA, 2025)

### 3. Agricultural labour market performance

Figure 1 illustrates trends in agricultural employment across the nine provinces of South Africa in Q1\_2025. The leading province in terms of agricultural employment is the Western Cape, contributing 26% (244 100) to total agricultural employment in the country. Followed by Mpumalanga with 15% (138 124) agricultural jobs, then KwaZulu-Natal with 12% (131 515). The provinces with the lowest number of agricultural jobs are Gauteng and North West province, which accounted for 4% ( 38 267 jobs) and 6% (58 381 jobs) respectively in this quarter.

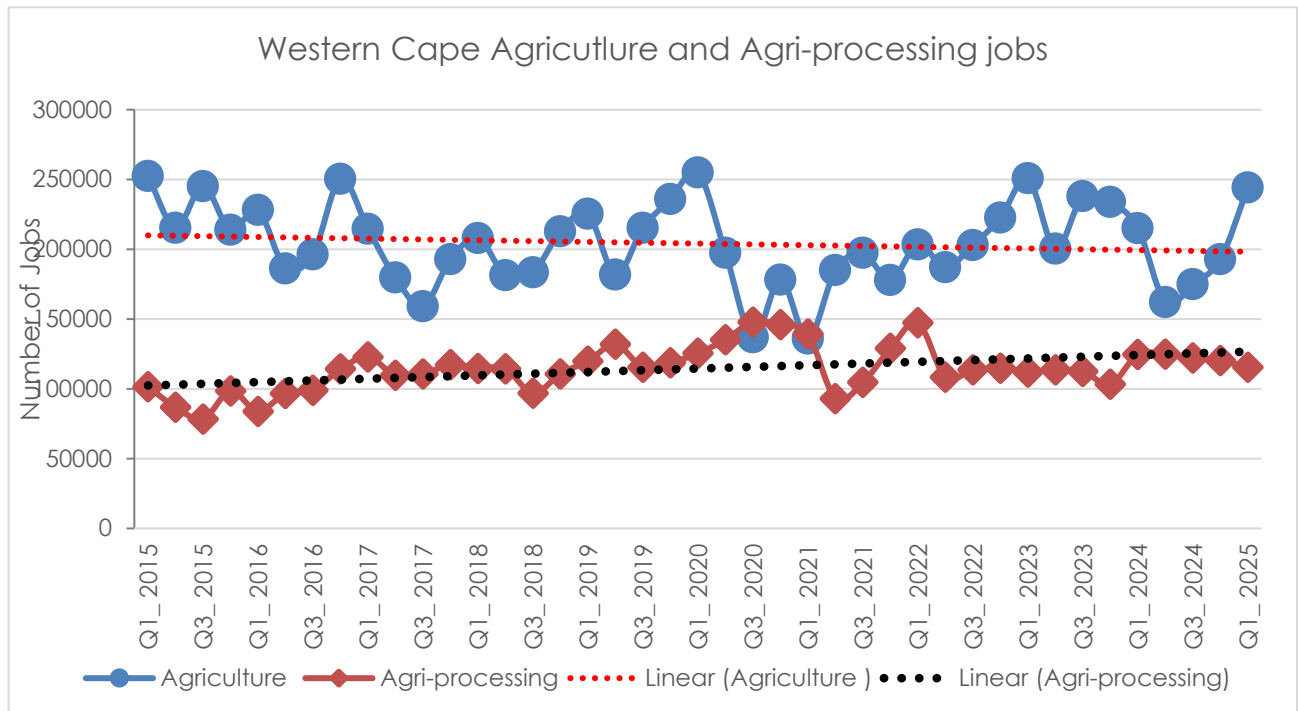


**Figure 1: Quarterly primary agricultural employment per province Q1\_2025**

Source: (Stats SA, 2025)

Figure 2 shows the Western Cape agriculture and agri-processing sector's employment numbers for the period Q1\_2015 to Q1\_2025. Agriculture and agri-processing combined accounted for 12% (359 628 jobs) of the total provincial employment in Q1\_2025. From the first quarter of 2015 to the same quarter of 2025, employment in agriculture shows a slightly declining job trend, whereas agri-processing sector jobs remained steady (see trend lines in the figure below).

In Q1\_2025, employment in agriculture experienced a notable increase of 27% (51 282 jobs) (q/q) and 13% (28 994 jobs) (y/y). This growth is primarily driven by 34% employment growth in crop farming and 1% in animal farming. In contrast, jobs in the agri-processing sector declined by -4% (4 737) q/q and 7% (9 061) y/y. This decrease was mainly attributed to job losses in Agri-processing industries, specifically in the production, processing and preservation of meat, fish and fruits, which saw an 8% decline (3 021 jobs) q/q and a 37% drop (19 878 jobs) y/y. Additionally, the manufacture of beverages experienced a 21% reduction (5 759 jobs) q/q and a 28% decrease (8 815 jobs) y/y. However, the dairy industry recorded an increase of 33% (1 346 jobs) q/q and 42% (1 584 jobs) y/y/. The tobacco industry also saw growth, with a 36% rise (750 jobs) q/q.

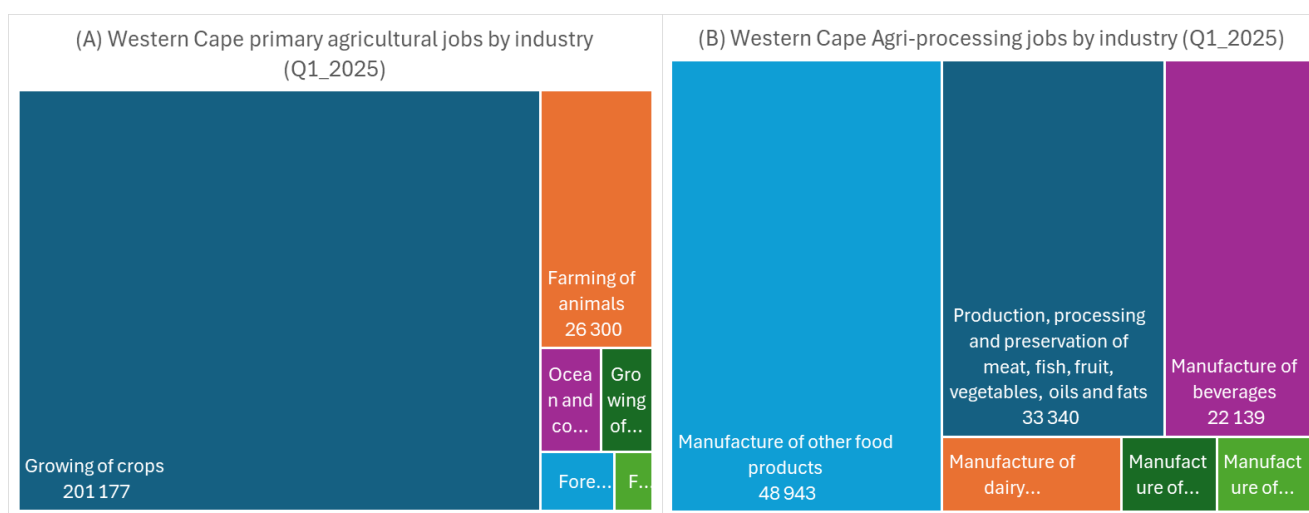


**Figure 2: Western primary and agri-processing employment trends, Q1\_2015 to Q1\_2025**

Source: (Stats SA, 2025)

Figure 3 below further disaggregates primary agricultural employment by industry (Figure 3A) and also for agri-processing (Figure 3B) in Q1\_2025. It can be seen from Figure 3A that a large share, 82% (201 177 jobs), in agriculture is from crop farming, followed by animal farming, 11% (26 300 jobs). Compared to the same quarter in 2024, the crop farming industry's employment increased by 4% (8 324 jobs), animal farming 128% (14 759) and mixed farming 488% (4 055 jobs).

Whereas in the case of agri-processing sector (Figure 3B) the top three industries by employment are; the manufacture of other food products 42% (48 943), followed by the production, processing and preservation of meat, fish, fruit, vegetable, oil & fats which accounts for 29% (33 340 jobs) and the manufacture of beverages at 19% (22 139 jobs). Compared to the same quarter in 2024, agri-processing jobs declined by 7%.



**Figure 3: Breakdown of agriculture and Agri-processing jobs by industry in the WC**

Source: Stats SA, 2025

#### 4. Summary points

- Agriculture and agri-processing combined accounted for 12% (359 628 jobs) of the total provincial employment in Q1\_2025
- Agricultural employment increased 27% (51 282 jobs) (q/q) and 13% (28 994 jobs) (y/y), driven largely by 34% employment growth in crop farming and 1% in animal farming.
- Employment in the agri-processing sector saw a decline of -4% (4 737) q/q and 7% (9 061) y/y even though it shows a decline in employment trend over a 10 year period (Q1: 2015-2025).

#### 5. Bibliography

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