



## WESTERN CAPE AGRICULTURE AND AGRIPROCESSING EMPLOYMENT PERFORMANCE IN THE FIRST QUARTER OF 2026

### Summary

The Western Cape agricultural sector continues to play an important role at both provincial and national level, contributing 26% (249 270 jobs) to total South Africa's primary agricultural employment in Q1\_2026. At provincial level, agricultural employment expanded strongly quarter-on-quarter (q/q) by 16% and showed a moderate annual growth at 2% in this quarter. Growth was primarily driven by crop production (84% of agricultural employment), highlighting, the labour-intensive nature of the horticultural sector. However, the livestock sector employment declined sharply by (-18% q/q; - 20% y/y) due to disease outbreak shock, specifically Food and Mouth Disease (FMD). Agri-processing employment contracted (-3 q/q; -17% y/y) despite gains in specific sectors such as dairy and food processing, which showed positive performance. Overall, agriculture and agri-processing combined accounted for 12% of provincial employment, indicative of the strategic importance to this sector to the economy.

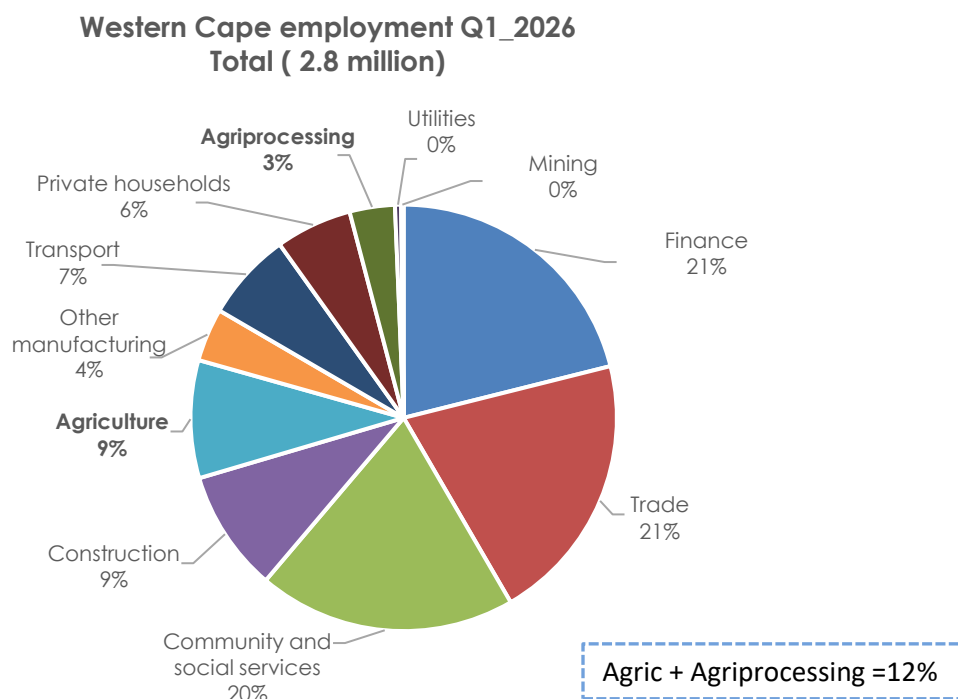
### 1. Introduction

This report analyses the Western Cape agricultural labour market performance in the first quarter of 2026 (Q1\_2026) based on quarterly labour force survey statistics (QLFS) released by Statistics South Africa (Stats SA). Employment growth is a priority of the Western Cape government, and central to the Growth for Jobs Strategy (G4J) aimed at achieving a one trillion-rand economy by 2035 (WCG, 2023). The G4J aims to create more than 600 000 new jobs in the province by 2035.

To accomplish this goal, it is essential to regularly monitor the labour market performance to identify barriers and gather intelligence to inform strategic interventions aimed at creating a conducive environment to drive economic and employment growth. Hence, this report analyses the labour market dynamics in the Western Cape, focusing on the agricultural sector. Starting with an overview of employment in the province by sector, then followed by a descriptive discussion of agriculture and agri-processing employment trends in Q1\_2026.

## 2. Overview of employment

**Figure 2.1** below illustrates break-down of employment by sectors in Western Cape during the first quarter of 2026(Q1\_2026). The province recorded a total of 2.8 million jobs in Q1\_2026, and the top three sectors with the largest share of employment were financial services and trade each at 20% of total labour force, followed by community services at 19%. Primary agricultural sector with a share of 9% (249 270 jobs) ranks the sixth position as a major employer after Construction 9% (257 506 jobs), and agri-processing (Food, beverage and tobacco) contributed 3% (95 701 jobs). Therefore, agriculture and agri-processing combined contributed 12% total to provincial labour force.

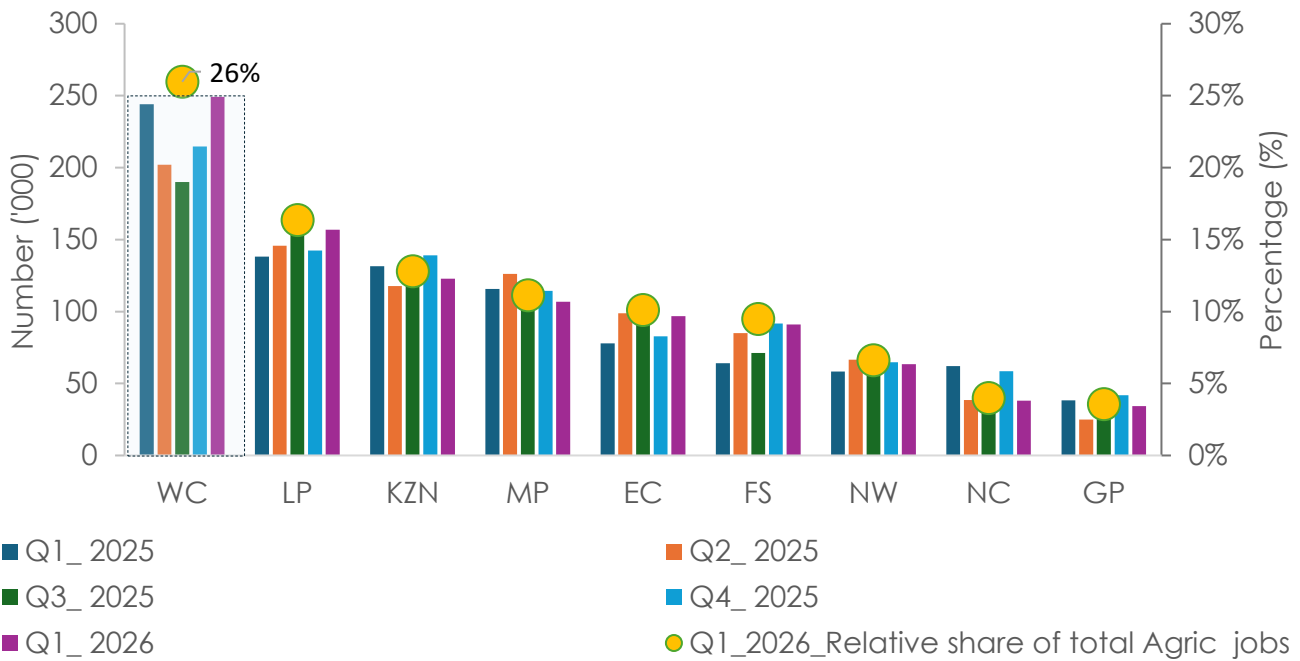


**Figure 2.1: Western employment breakdown by sector Q1\_2026**

Source: (Stats SA, 2026)

## 3. Agricultural labour market performance

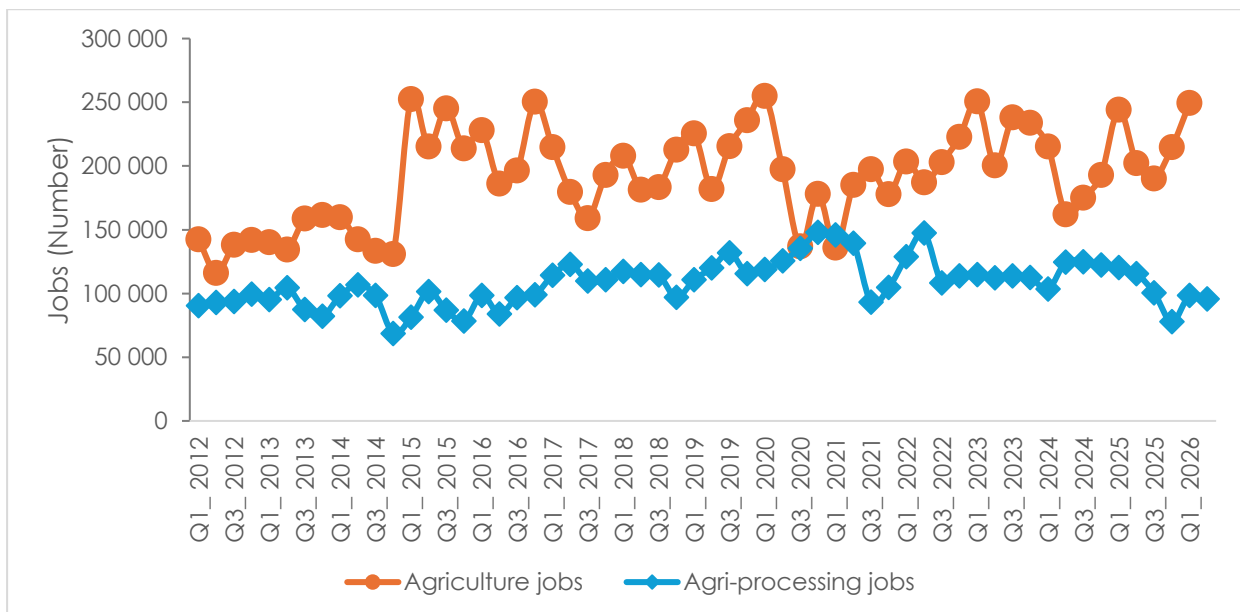
**Figure 3.1** illustrates trends in agricultural employment across the nine provinces of South Africa for the period Q1\_2025 to Q1\_2026. Nationally, a total of 959 820 agricultural jobs were recorded in Q1\_2026, and a large of these jobs are concentrated in the Western Cape (26%), Limpopo (16%), KwaZulu Natal (13%) and the rest other provinces. The Western Cape experienced a slight increase of 16% (34 668 jobs) q/q and 2% (5 169 jobs) y/y in Q1\_2026.



**Figure 3.1: RSA agricultural jobs by province and relative share Q1\_2025 to Q1\_2026**

Source: (Stats SA, 2026)

**Figure 3.2** shows the Western Cape agriculture and agri-processing sectors' employment trends for the period Q1\_2012 to Q1\_2026. Overall, both agricultural and agri-processing combined contributed a total of 344 971 jobs in Q1\_2026 (q/q), showing quarterly increase of 10% driven largely by agricultural jobs, specifically the growing of crops, while the livestock sector experienced a decline of 18% (4 701 jobs) q/q and 20% (5 325 jobs). This is not a surprise as the period corresponds to a serious outbreak of the Food and Mouth disease (FMD).



**Figure 3.2: WC primary and agri-processing employment trends, Q1\_2012 to Q1\_2026**

Source: (Stats SA, Publication, 2026)

**Table 3.1** presents a further disaggregation of the agriculture and agri-processing employment by industry in the Western Cape based on Statistics South Africa data (Stats SA, 2026a). The agricultural sector is important to the economy of the province as it creates jobs in the rural areas, absorbing low, semi-skilled and skilled labour force. It's growth in this quarter was significant despite job losses in the livestock and animal feed firms.

**Table 3.1: WC jobs in Agric and Agri-processing Jobs in Q1\_2026, growth rates (%)**

DISAGGREGATED AGRICULTURE AND AGRIPROCESSING ACTIVITIES	Q1_2026 JOBS (NUMBER)	RELATIVE TOTAL AGRIC JOBS IN Q1_2026`	Q/Q % CHANGE (Q1_2026 VS Q4_2025)	Y/Y % CHANGE (Q1: 2026 VS 2025)
<b>AGRICULTURE, HUNTING, FORESTRY AND FISHING</b>				
Growing of crops	210 271	84%	19%	5%
Farming of animals	20 975	8%	-18%	-20%
Growing of crops combined with farming of animals (mixed farming)	11 359	5%	270%	133%
Agricultural and animal husbandry services, excl. veterinary activities	-	0%	-	-
Game hunting, trapping & game propagation, including related services	-	0%	-	-
Production of organic fertilizer	1 926	1%	84%	-
Forestry and related services	-	0%	-100%	-100%
Logging and related services	-	0%	-	-
Ocean and coastal fishing	4 738	2%	-33%	-17%
Fish hatcheries and fish farms	-	0%	-	-100%
<b>Total agriculture jobs/ % change</b>	<b>249 270</b>	<b>100%</b>	<b>16%</b>	<b>2%</b>
<b>AGRI PROCESSING JOBS (FOOD, BEVERAGE AND TOBACCO)</b>				
	<b>Q1_2026</b>	<b>Relative share</b>	<b>q/q % change</b>	<b>y/y % change</b>
Production, processing and preservation of meat, fish, fruit, vegetables, oils and fats	30 363	32%	43%	-9%
Manufacture of dairy products	9 282	10%	27%	72%
Manufacture of grain mill products, starches and starch products and prepared animal feeds	1 920	2%	-73%	-33%
Manufacture of other food products	32 492	34%	-14%	-34%
Manufacture of beverages	21 644	23%	-14%	-2%
Manufacture of tobacco products	-	0%	-	-100%
<b>Total Agri-processing jobs/ % change</b>	<b>95 701</b>	<b>100%</b>	<b>-3%</b>	<b>-17%</b>

Source: Stats SA, 2026

#### 4. Conclusion

The Western Cape agricultural sector labour market showed an expansion in primary agricultural jobs driven by the strong crop production and seasonal factors. However, compared to the same quarter last year, the growth was modest at 2%, due to significant contraction of jobs in the livestock sector and agri-processing highlighting structural fragilities. The divergence between agriculture and weakening agri-processing sector is concerning after a long history of positive employment performance in the agri-processing subsector which is viewed to have great potential. The focus on biosecurity risks and other external shocks related to market access continue to pose risk to labour market performance in the agricultural sector.

#### 5. Reviewer/s.

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#### 6. Acknowledgement

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