Western Cape Government

FOR YOU

Agriculture



Western Cape Department of Agriculture

WESTERN CAPE AGRICULTURAL PRICE TRACKER

How global shocks are driving local agricultural costs

2 - 13 November 2026

PRESENTATION OUTLINE

- 📈 Key Agricultural Price Indicators
- 🌍 Western Cape Agricultural Exports to Middle Eastern Markets
- 📰 Agricultural Market News & Developments
- 📊 Consumer Price Inflation (CPI): Implications for Households
- 🚢 Fresh Produce Market Trends and Price Movements
- 📡 On the Radar: Key Developments in the Weeks Ahead



WESTERN CAPE AGRICULTURAL PRICE TRACKER

2–13 NOV 2026

01 GLOBAL MARKET SIGNALS

BRENT FUTURES | REUTERS

US$109.75/bbl ▼ 3.2%

2 Nov 2026, intraday · vs prior session

EIA BRENT SPOT **US$123.10**

27 Oct · ▼3.9% vs 26 Oct (US$128.12)

USD/ZAR **R16.64**

2 Nov indicative · ▼R0.07 vs 30 Oct (R16.71)

02 FUEL AND ENERGY

CEF ESTIMATE · OCT → 4 NOV

Petrol 95 ULP	▼ 49c/l
Diesel 50 ppm	▼ R1.68/l
Illuminating paraffin	▲ R2.74/l
LPG	Pending

Forecast includes temporary levy cuts; official 4 Nov prices pending.

03 WESTERN CAPE INFLATION

HEADLINE CPI

5.5%

Aug 5.4 → Sep 5.5%

FOOD CPI

3.1%

Aug 2.5 → Sep 3.1%

Latest official: Sep 2026 · Oct CPI 18 Nov

ECONOMIC SIGNAL | **Oil eases intraday; November levy relief may partly offset international fuel-price pressure.**

04 CAPE TOWN VEGETABLE PRICES

LATEST: 24 OCT 2026 | R/TON

Potatoes	≈ R6,800	▼ ≈R7,800
Onions	≈ R13,800	▼ ≈R15,600
Tomatoes	≈ R10,800	▼ ≈R17,000
Peppers	≈ R16,000	▼ ≈R23,500

Prices ≈ rounded from 24 Oct chart; change vs 10 Oct.

05 CAPE TOWN FRUIT PRICES

LATEST: 24 OCT 2026 | R/TON

Oranges	≈ R4,200	▲ ≈R3,100
Apples	≈ R11,000	▲ ≈R10,500
Pears	≈ R11,000	▲ ≈R10,100
Table grapes	≈ R66,000	▼ ≈R82,000

Prices ≈ rounded from 24 Oct chart; change vs 10 Oct.

06 GRAINS, TRADE & OUTLOOK

NATIONAL WHEAT FORECAST | OCT 2026 **1.789 Mt**

▼ 0.9% vs September CEC forecast (1.806 Mt)

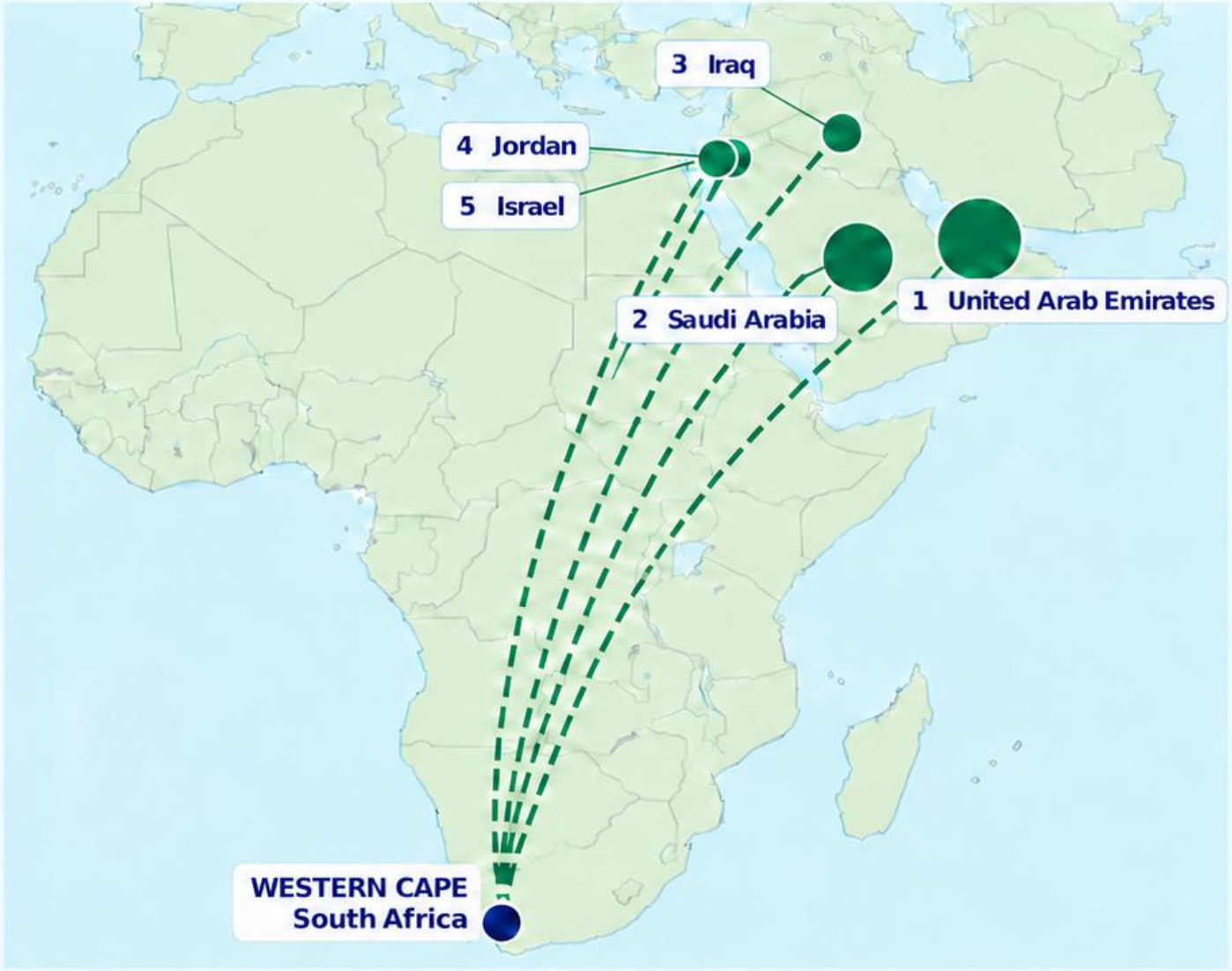
AGOA	2027 eligibility review: decision due
GLOBAL	Oil routes, freight and fertiliser risk
WEATHER	WC dam levels and irrigation outlook
NEXT	WASDE 10 Nov · CEC 26 Nov

WESTERN CAPE | AGRICULTURAL TRADE INTELLIGENCE

Leading Middle Eastern export markets

Aug 2025–Jul 2026 totals (R million) | Product changes: 12 months versus previous 12 months

Large percentage increases reflect low starting values.



1 United Arab Emirates

12-month total **R5,601m**

12-month change: ▲ 7.8% | Mar–Jul change: ▼ 13.1%

Top products | 12-month value change

1. Oranges	2. Apples	3. Lemons & limes
▼ 7.1%	▲ 0.6%	▲ 34.5%

2 Saudi Arabia

12-month total **R3,039m**

12-month change: ▲ 64.2% | Mar–Jul change: ▲ 95.1%

Top products | 12-month value change

1. Lemons & limes	2. Apples	3. Oranges
▲ 295.4%	▲ 93.9%	▼ 7.7%

3 Iraq

12-month total **R462m**

12-month change: ▼ 39.7% | Mar–Jul change: ▼ 69.5%

Top products | 12-month value change

1. Oranges	2. Lemons & limes	3. Mandarins
▼ 14.3%	▼ 36.5%	▼ 84.0%

4 Jordan

12-month total **R409m**

12-month change: ▲ 112.6% | Mar–Jul change: ▲ 74.9%

Top products | 12-month value change

1. Fresh lamb carcasses	2. Other sheep carcasses	3. Boneless beef
▲ 1,022.6%	▼ 4.0%	▲ 10,021.5%

5 Israel

12-month total **R404m**

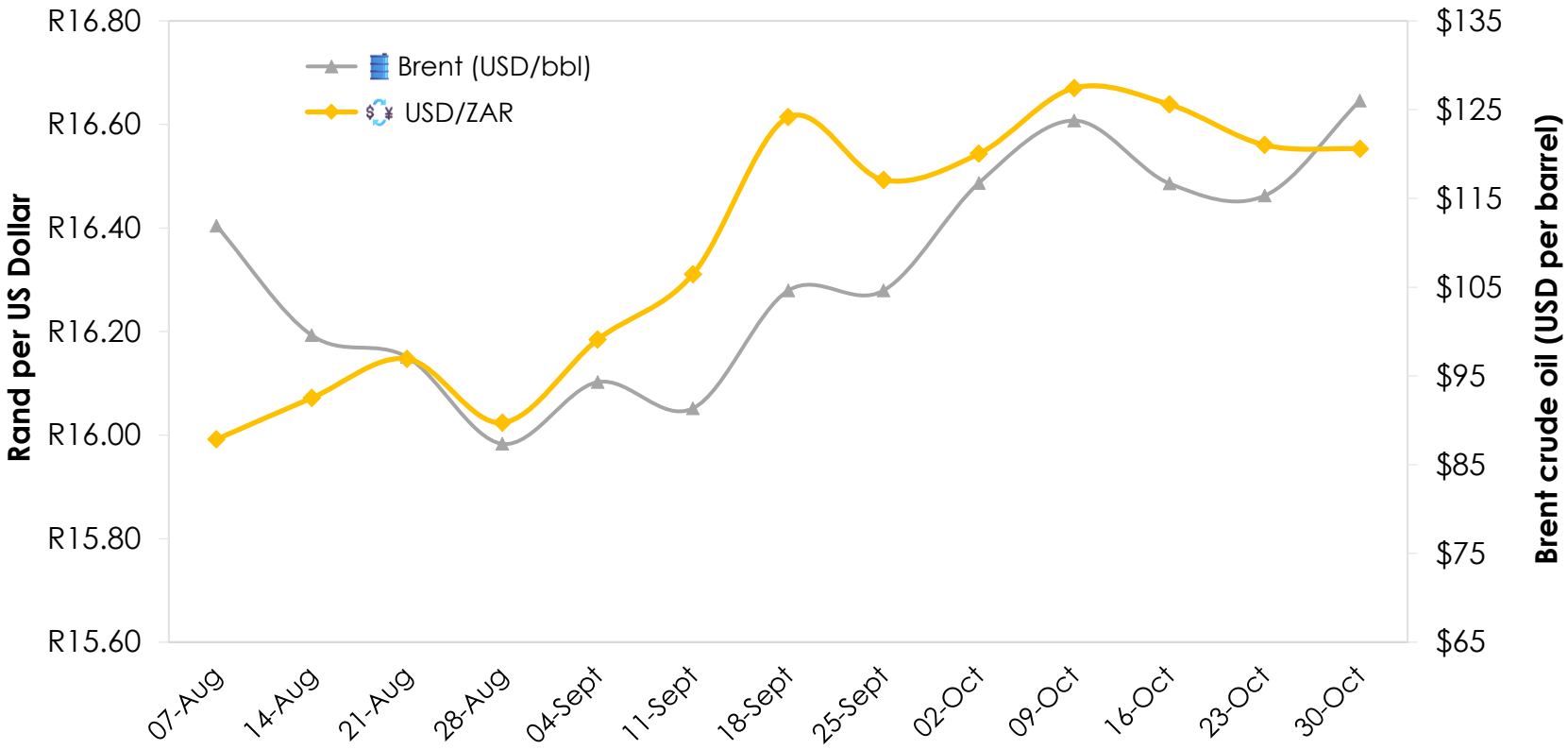
12-month change: ▼ 16.6% | Mar–Jul change: ▼ 61.2%

Top products | 12-month value change

1. Fresh grapes	2. Frozen hake	3. Other fruit juices
▼ 20.4%	▲ 235.8%	▼ 55.1%

12-month comparison: Aug 2025–Jul 2026 versus Aug 2024–Jul 2025.
Additional comparison during Middle East geopolitical tensions: Mar–Jul 2026 versus the same months in 2025.
Source: Quantec EasyData / SARS, TRD11, Western Cape (P1), all ports, HS chapters 01–24. Rankings among selected countries.

WEEKLY BRENT CRUDE PRICES AND USD/ZAR EXCHANGE RATE: AUGUST – OCTOBER 2026



Month	Brent (US$/bbl)	USD/ZAR
August	$ 91.08	R16.18
September	$ 112.94	R16.20
October	$ 123.80	R16.56

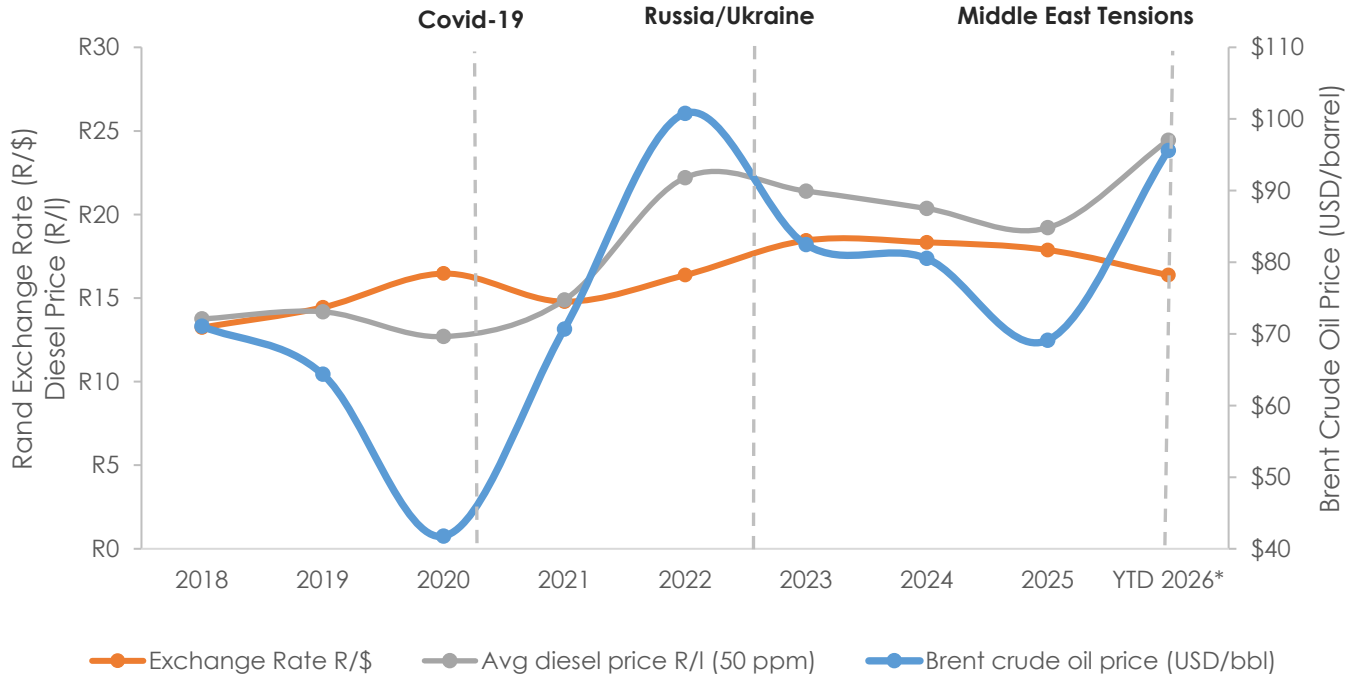
Brent crude strengthened, averaging US$91.08/bbl in August, US$112.94/bbl in September and US$123.80/bbl in October.

The rand weakened, from an average of R16.18/US$ in August to R16.56/US$ in October.

Higher oil prices and a weaker rand raised the indicative rand cost of Brent by approximately 39%, adding pressure to fuel, agricultural input and transport costs.

Source: US Energy Information Administration; South African Reserve Bank; Reuters, 2 November 2026

KEY DRIVERS OF DIESEL PRICES: BRENT, USD/ZAR AND GLOBAL SHOCKS



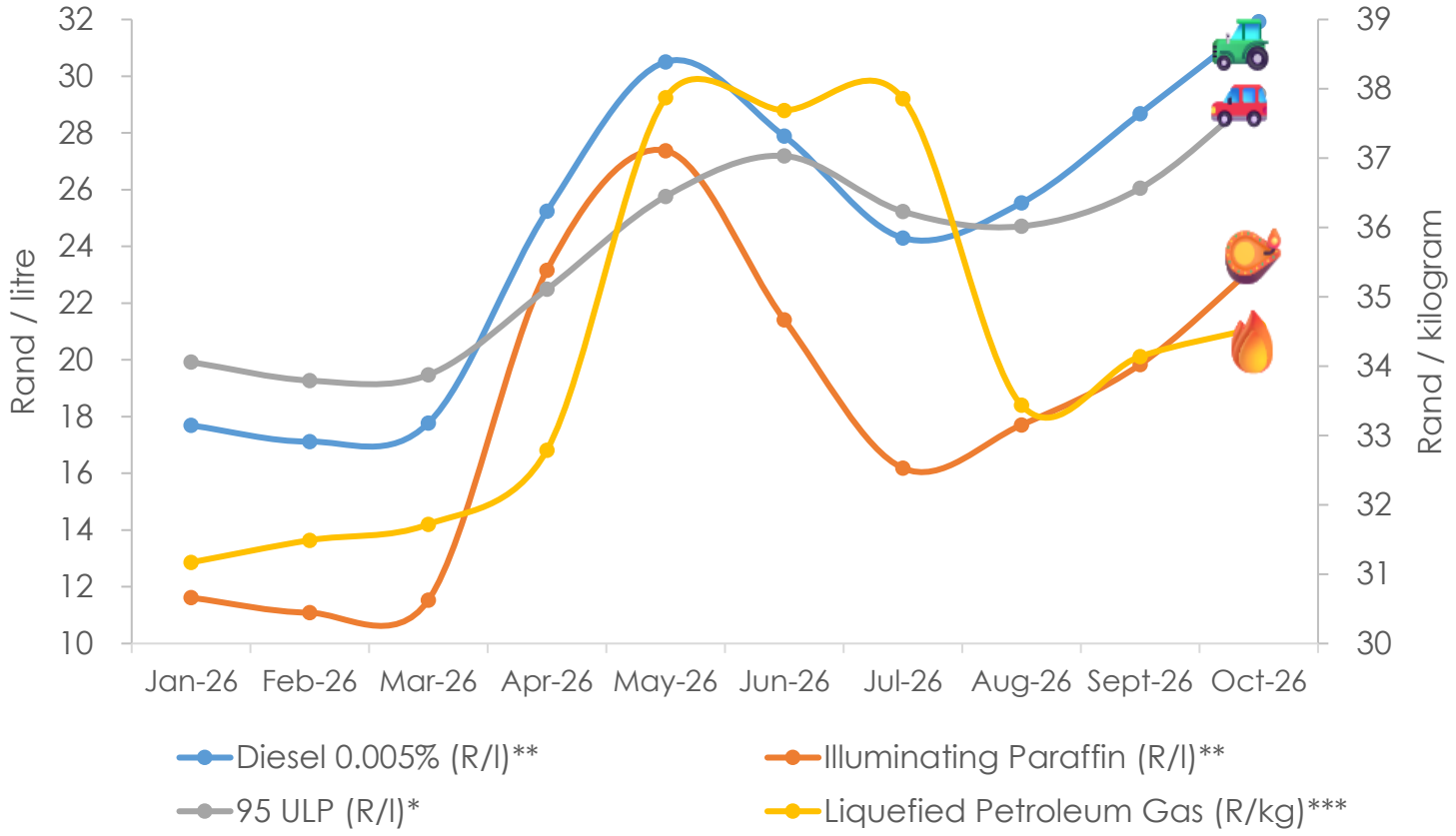
Note: Annual averages for 2018–2025; YTD average to Oct 2026.

	Brent crude oil price (USD/bbl)	Exchange Rate R/$	Avg. diesel price R/l (50 ppm)
Jan-26	66.60	16.26	R 18.14
Feb-26	70.89	15.99	R 17.57
Mar-26	103.13	16.62	R 18.22
Apr-26	**117.29**	**16.54**	**R 25.73**
May-26	100.52	16.48	R 31.25
Jun-26	86.11	16.40	R 28.63
Jul-26	83.76	16.46	R 24.79
Aug-26	91.08	16.18	R 26.27
Sept-26	112.38	16.20	R 29.42
Oct-26	**123.80**	**16.56**	**R 32.41**

- **Mar–May 2026:** Brent and diesel prices rose sharply.
- **Jun–Jul 2026:** Lower oil prices provided temporary relief.
- **Aug–Oct 2026:** Brent climbed to **US$123.80/bbl**, while diesel rose to **R32.41/l** despite a relatively firm rand.

Sources: EIA, Brent crude oil price; FRED, USD/ZAR exchange rate; DMRE, 50 ppm diesel price.

COASTAL FUEL PRICES



🚜 **Diesel:** Increase sharply again in October, remaining the strongest fuel-cost pressure.

🚗 **Petrol:** Increased further in October after a relatively stable Q3.

🪔 **Paraffin:** Continued to rise in October, but remained below its May peak.

🔥 **LPG:** Increased moderately in October, remaining below its Q2 high.

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Sources: FIASA, DMPR, October 2026

CONSUMER INFLATION

NEWS ROUNDUP

Petrol and diesel price CUTS in time for Local Government Elections

Fuel type	Oct price	Nov projection	Levy	Potential change
Petrol 93	R29.88	R31.05	-R1.50	**-33c/l**
Petrol 95	R30.25	**R31.26**	-R1.50	**-49c/l**
Diesel 0.05%	R31.95	**R33.37**	-R3.00	**-R1.58/l**
Diesel 0.005%	R33.29	R34.61	-R3.00	**-R1.68/l**

https://www.thesouthafrican.com/news/petrol-and-diesel-price-cuts-in-time-for-local-government-elections

Oil prices ease 3% on optimism for Qatari-led talks on ending Iran war



https://www.reuters.com/business/energy/oil-slips-more-than-1-talks-continue-ending-iran-war-2026-11-01

World Bank sees commodity prices up 23% in 2026 due to Middle East war, other shocks

https://www.reuters.com/business/world-bank-sees-commodity-prices-up-23-2026-due-middle-east-war-other-shocks-2026-10-28



SA confident ahead of AGOA review decision



https://www.freightnews.co.za/article/sa-confident-ahead-of-agoa-review-decision



WESTERN CAPE FRESH PRODUCE MARKET: VEGETABLE MARKET TRENDS

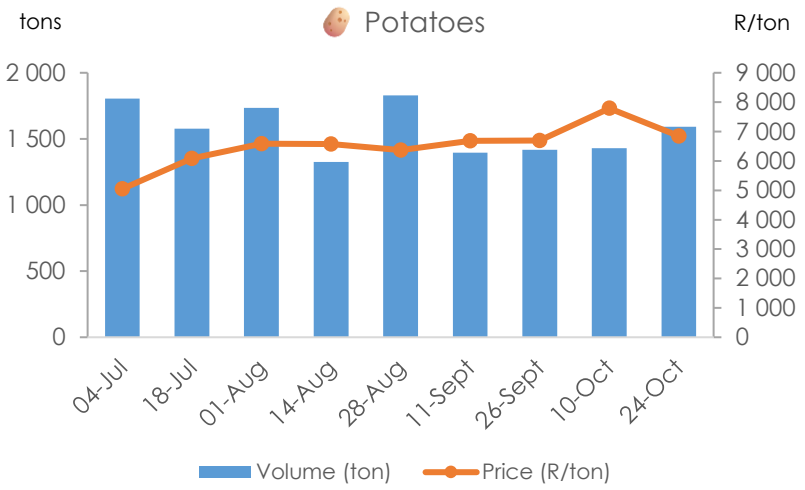
🌱 **Farmer implication:** Firmer potato and onion prices supported potential returns, while increased pepper volumes coincided with falling prices. Tomato price volatility continued to create uncertainty.

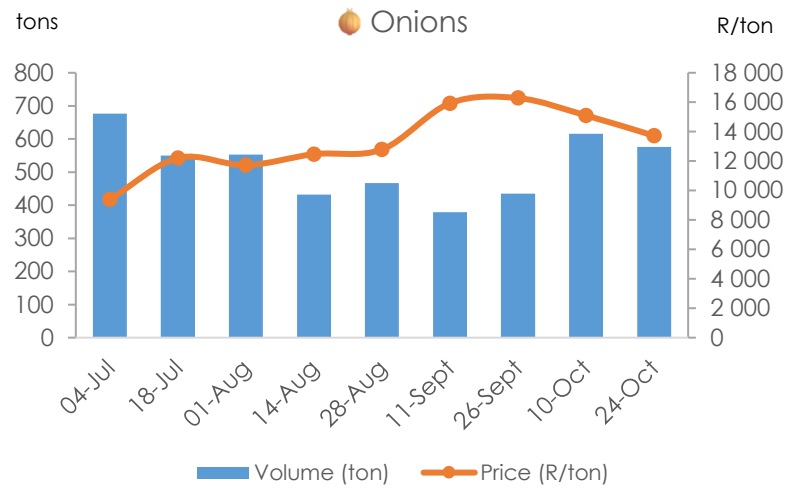
🥔 **Potatoes** ⬆️: Prices strengthened from July, peaking in early October before easing slightly.

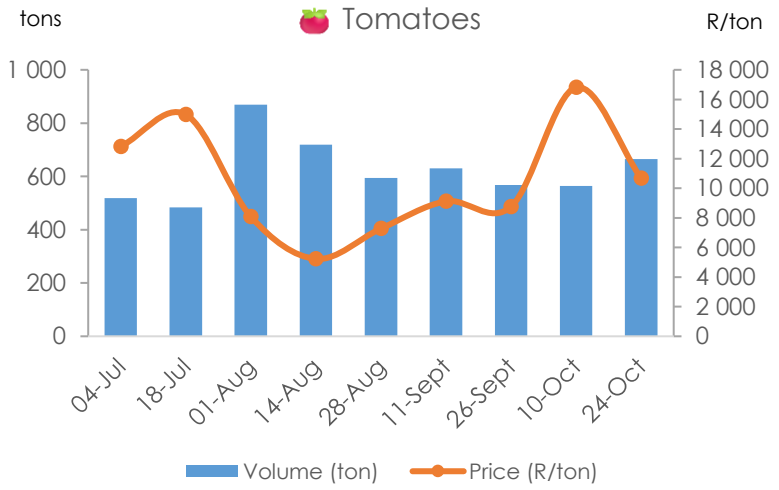
🧅 **Onions** ⬆️: Prices increase steadily through September before moderating in October.

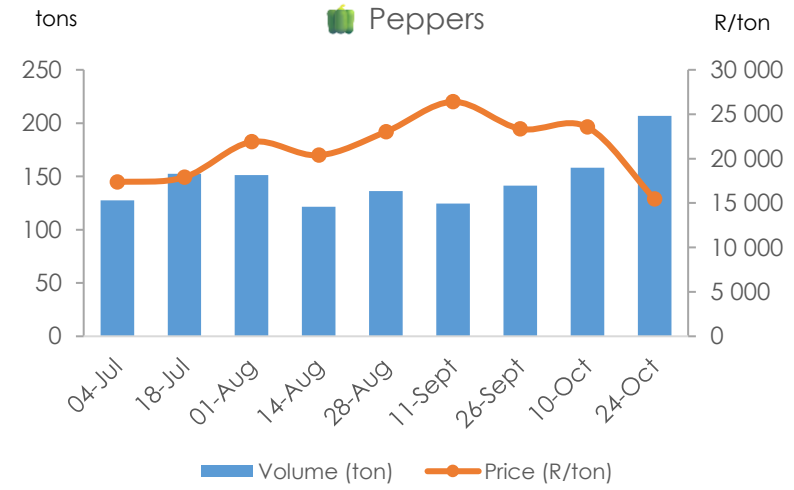
🍅 **Tomatoes** 🔄: Prices remained volatile, recovering from August lows before falling again in late October.

🫑 **Peppers** ⬇️: Increased market volumes coincided with a sharp price decline in late October.









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Source: Techno Fresh, Cape Town Fresh Produce Market



WESTERN CAPE FRESH PRODUCE MARKET: FRUIT MARKET TRENDS

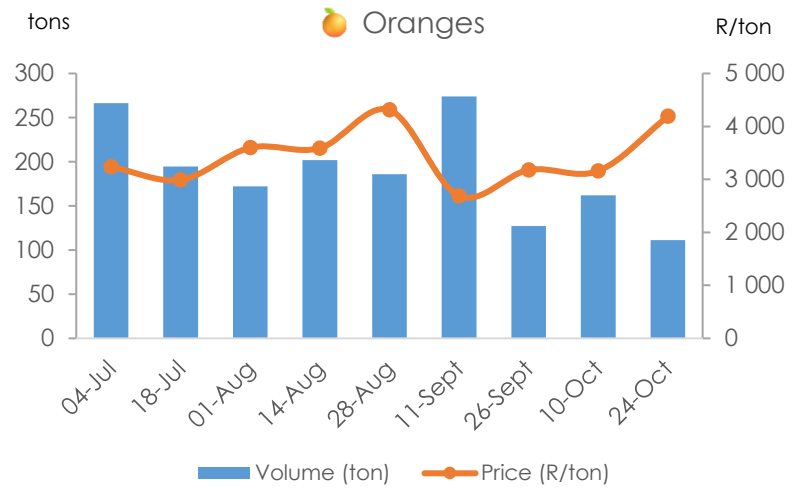
Farmer implication:
Firmer apple and orange prices may support returns per tonne, while volatile grape prices and changing market volumes create uncertainty.

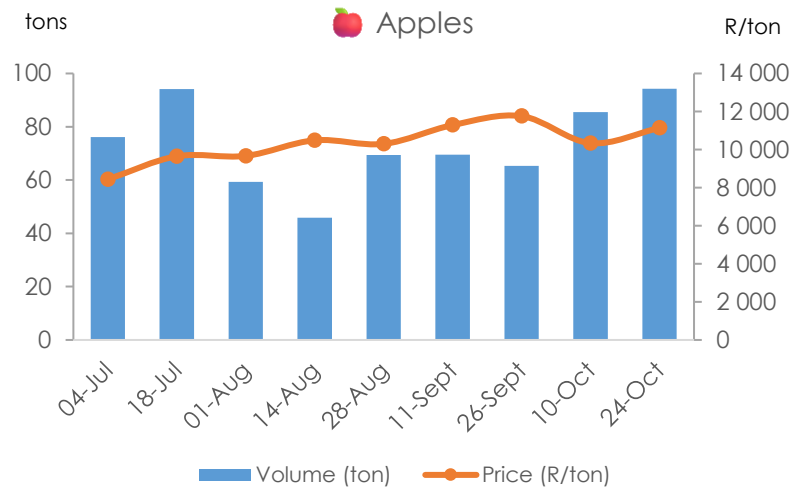
Oranges ⬆️: Prices recovered in late October as market volumes declined.

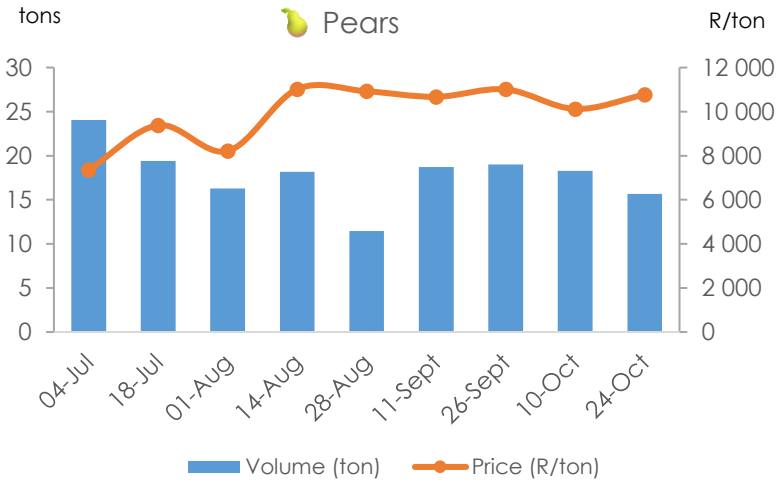
Apples ⬆️: Prices strengthened overall from July to October, despite increasing market volumes.

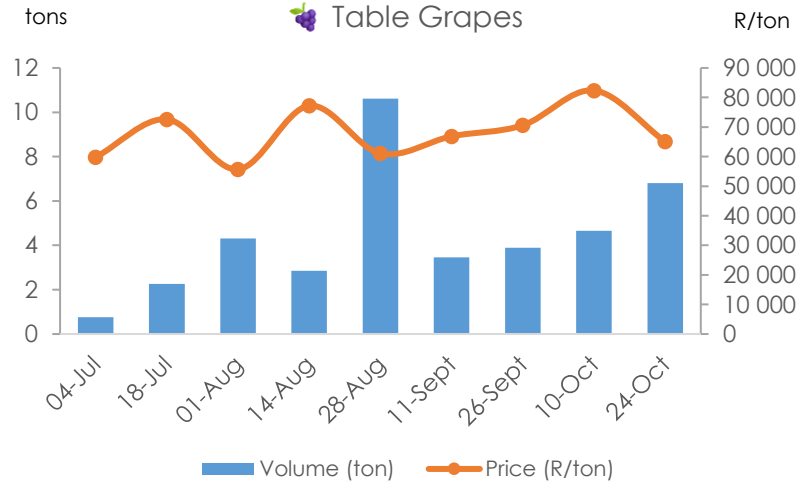
Pears ➡️: Prices remained relatively firm from August, while volumes eased towards late October.

Table grapes 🔄 : Prices remained volatile, peaking in early October before easing as volumes increased.





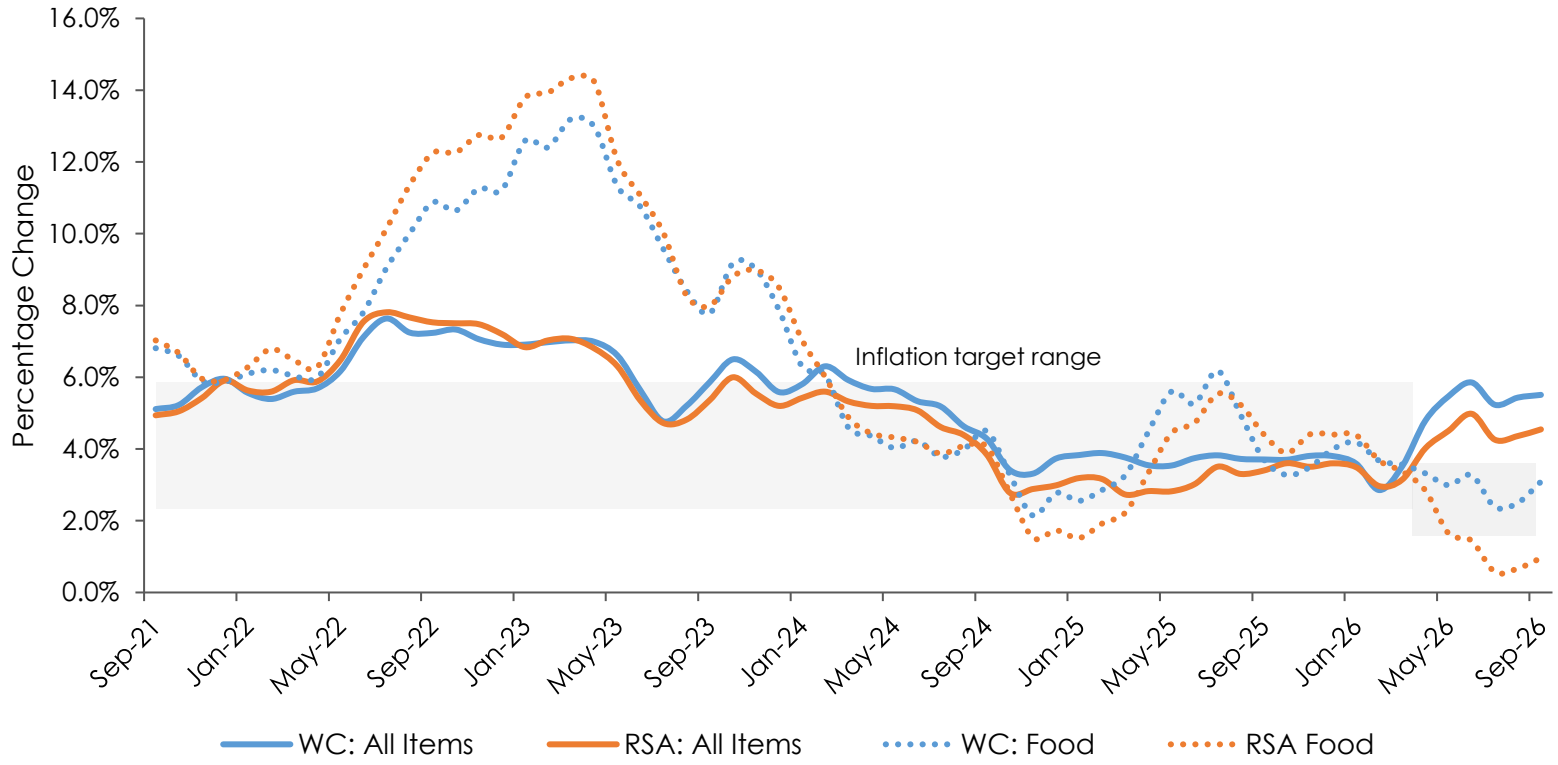




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Source: Techno Fresh, Cape Town Fresh Produce Market

SOUTH AFRICA AND WESTERN CAPE CONSUMER INFLATION: FIVE-YEAR TREND



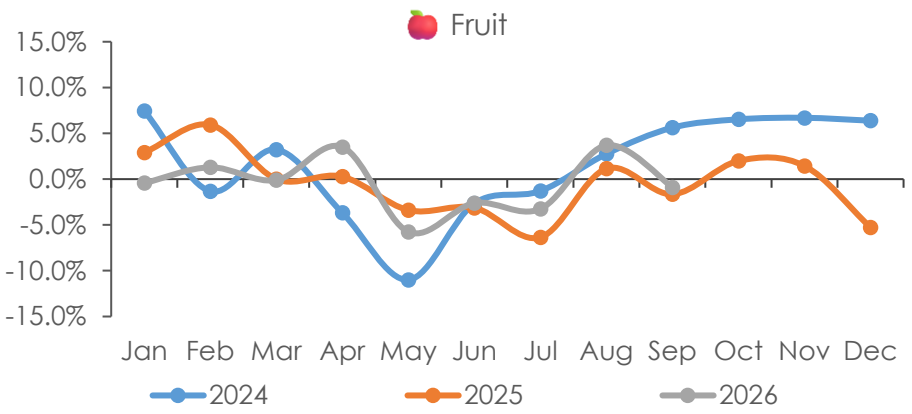
📉 Food inflation peaked at 14.3% nationally and 13.2% in the Western Cape in early 2023, before easing considerably.

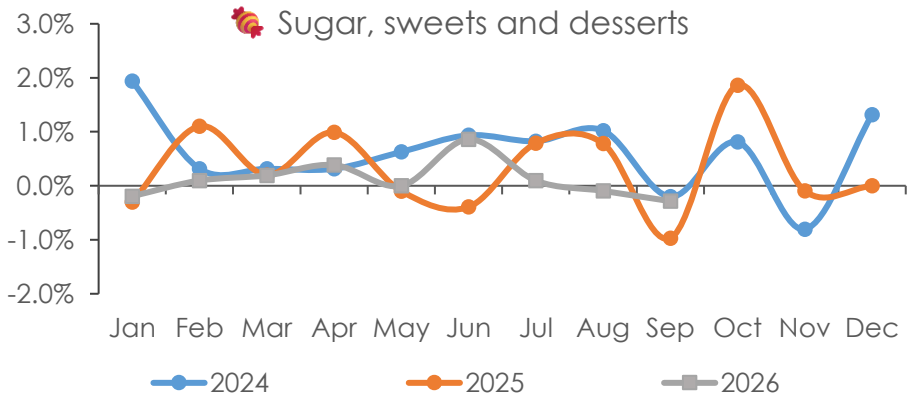
📊 By September 2026, headline inflation reached 5.5% in the Western Cape versus 4.5% nationally, while food inflation remained lower at 3.1% and 1.0%, respectively.

Source: StatsSA

SELECTED PRODUCTS AVERAGE CONSUMER PRICE INDEX CHANGES MONTH-ON-MONTH (%)

📊 **Monthly food-price movements remained relatively moderate during early 2026, with vegetables showing the largest short-term fluctuations, while fruit, sugar products and other food categories remained broadly stable.**



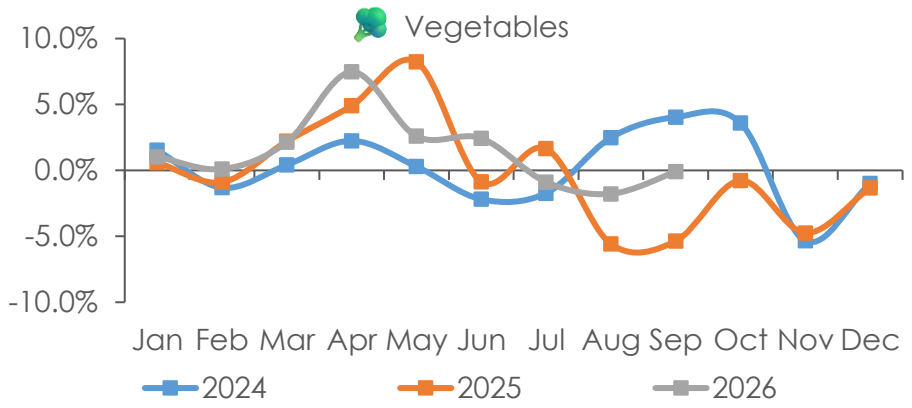


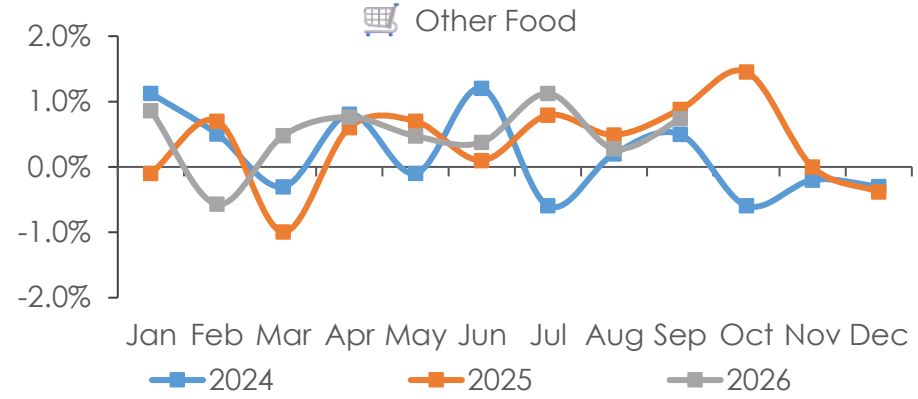
🍎 **Fruit:** Price volatility moderated during 2026 compared with the larger monthly swings observed in 2025.

🥦 **Vegetables:** Prices rose by about 8% in April 2026 before easing.

🍬 **Sugar, sweets and desserts:** Monthly price changes remained relatively contained, generally within ±1%.

🛒 **Other food:** Prices remained broadly stable, with monthly changes mostly limited to ±1.5%.





Source : Stats SA, 2026

Absolute Prices (Monthly): All Urban at national level
Food Basket for South Africans

Product Purchased	Unit of Measure	Sep-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	M-on-M (%)	Y-on-Y (%)
Rice	**2 Kg**	R 42.45	R 39.46	R 39.00	R 38.78	R 38.13	R 37.86	R 37.52	R 37.84	R 37.42	R 37.86	1.2%	-10.8%
Maize meal	**5 Kg**	R 75.46	R 70.97	R 72.59	R 69.52	R 68.88	R 68.51	R 67.31	R 65.09	R 65.26	R 64.85	-0.6%	35.0%
Tomatoes	**Per Kg**	R 26.44	R 26.15	R 26.70	R 29.00	R 31.69	R 34.12	R 36.31	R 35.39	R 30.66	R 26.59	-13.3%	0.6%
Carrots	**1 Kg**	R 32.56	R 15.73	R 15.64	R 15.97	R 17.14	R 20.57	R 20.86	R 19.07	R 18.12	R 17.03	-6.0%	11.1%
Onions	**Per Kg**	R 27.35	R 20.95	R 20.16	R 20.84	R 23.75	R 24.83	R 27.89	R 28.47	R 29.49	R 31.43	6.6%	40.2%

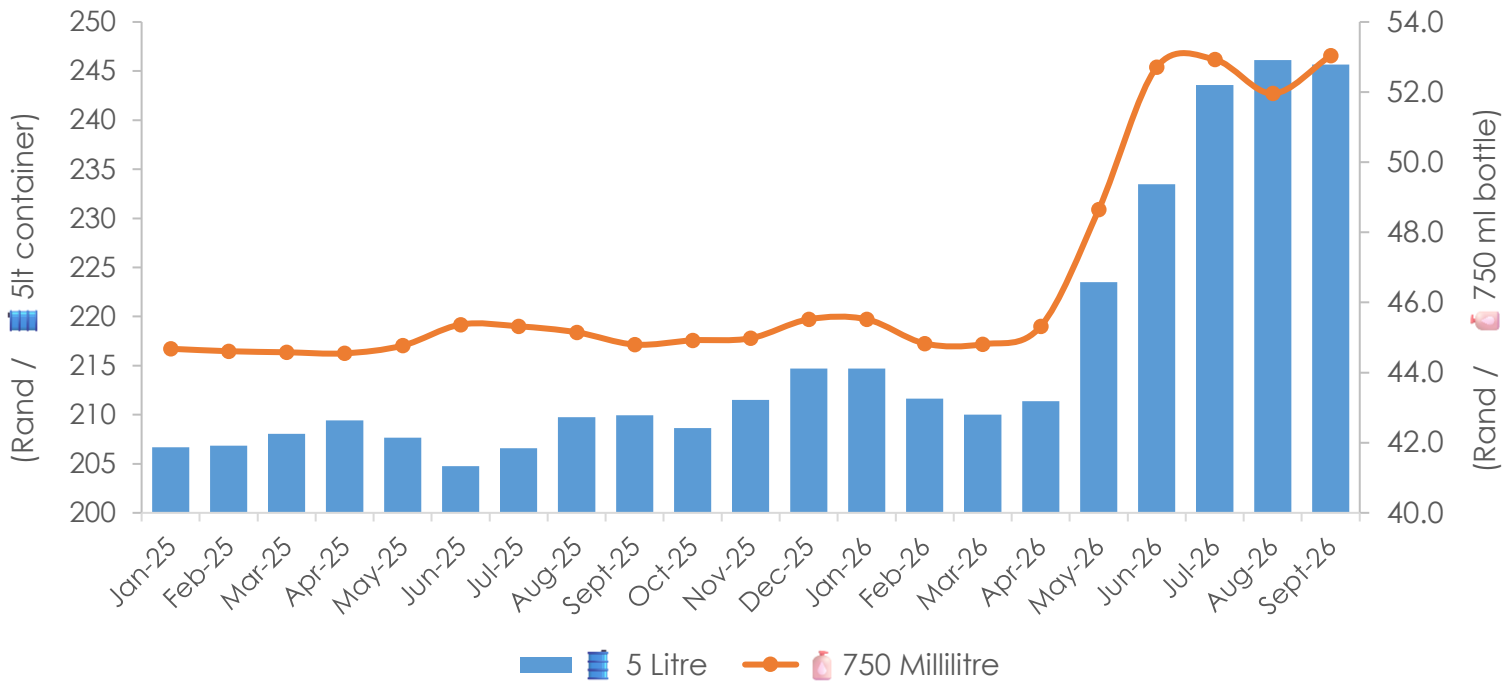
🌾 Rice prices decreased by 10.8% year-on-year, whereas maize meal prices rose substantially by 35.0%, reflecting diverging trends among staple foods.

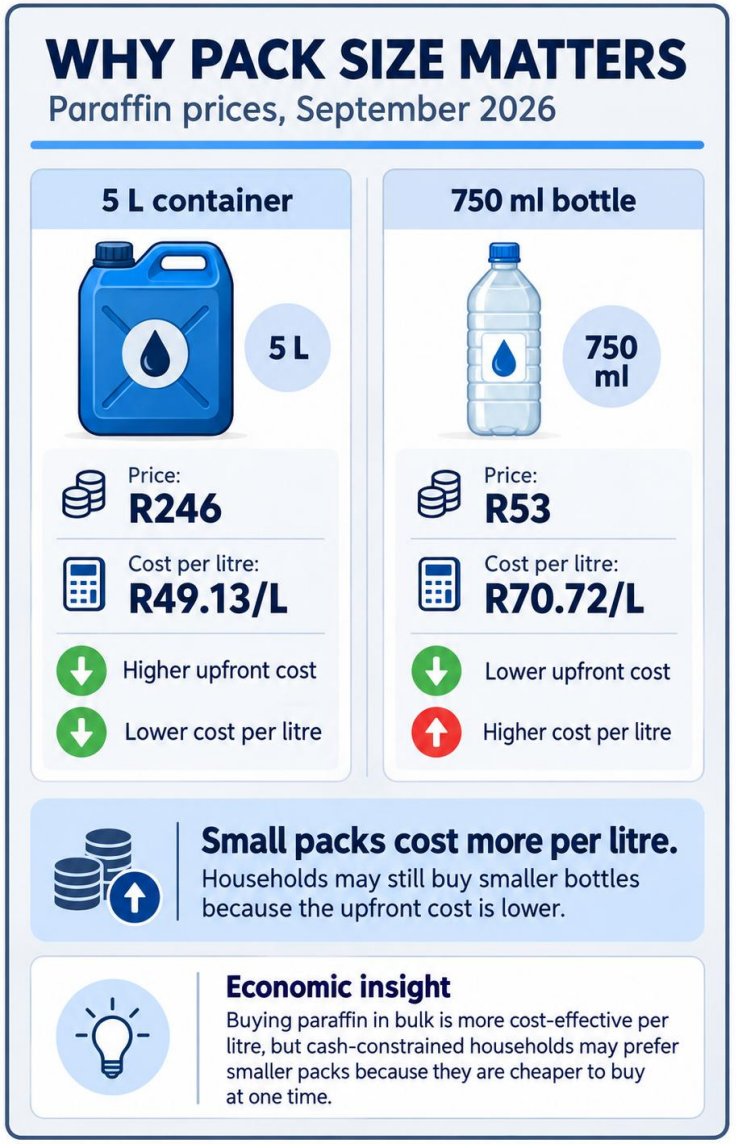
🥕 Carrot prices increased by 11.1% year-on-year but declined by 6.0% month-on-month in September 2026, indicating some moderation in recent months.

🧅 Onion prices continued to experience strong inflationary pressure until September, increasing by 40.2% year-on-year, the highest among the selected products due to high rainfall and late planting.

Source: StatsSA

URBAN SA PARAFFIN PRICES: MONTHLY PACK-SIZE TRENDS, JAN 2025–SEPT 2026





🏠 Around 2–3% of South African households still rely on paraffin, with greater dependence among lower-income households.

🛢️ From June to September 2026, the 5 L price increase from about R233 to R245, while the 🧴 750 ml bottle increased from about R52 to R53.

Western Cape Government

Source: StatsSA

ON THE RADAR

2 – 13 November 2026

🛢️ **Oil market:** OPEC+ maintained its December production plan. Monitor Brent volatility, Middle East supply risks and the IEA's November oil outlook.

💱 **Exchange rate and trade:** The AGOA eligibility decision and upcoming US employment and inflation data could affect export prospects and USD/ZAR movements.

🚢 **Logistics and grain markets:** Middle East shipping and fertiliser supply risks remain important. The USDA's 10 November forecast will provide updated global wheat, maize and soybean estimates.

🌧️ **Weather and water:** Western Cape water restrictions remain under consideration as summer approaches. Monitor dam levels, irrigation availability and El Niño-related heat and rainfall risks.

🌱 **Agricultural costs:** November fuel-levy relief should ease some petrol and diesel costs, while elevated international oil and fertiliser prices continue to pressure farm expenditure.

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KEY ECONOMIC DATES

2 – 13 November 2026

02 Nov	AGOA decision & water review	**What to monitor:** US market access and Western Cape irrigation and restriction risks.
04 Nov	November fuel-price adjustments	**What to monitor:** Petrol, diesel, LPG and levy-relief effects on farm costs.
06 Nov	FAO Food Price Index	**What to monitor:** Global food, cereal and vegetable-oil price movements.
10 Nov	USDA WASDE report	**What to monitor:** Global wheat, maize and soybean outlook and implications for SA grains.
12 Nov	Trade unit values & mining output	**What to monitor:** Export and import price signals and broader economic activity.
13 Nov	IEA Oil Market Report	**What to monitor:** Oil supply, demand, inventories and Brent-price risks.

Focus on releases most relevant to prices, costs, trade and financial conditions.



Thank you

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