Quarterly Economic Review of the Agro-processing industry in South Africa

2026: Q1

DIRECTORATE: AGRO-PROCESSING SUPPORT

agriculture
Department:
Agriculture
REPUBLIC OF SOUTH AFRICA

PREFACE

The National Development Plan (NDP) identifies the agro-processing industry for its potential to spur economic growth and create sustainable employment. The agriculture and agro-industries are postulated as having the latent potential to contribute to inclusive economic growth through forward and backward linkages by providing various opportunities for earning income in the food production, processing, distribution and retailing phases of the agro/food value chain. At policy level, specifically on economic transformation and job creation, the agro-processing industry is a key pillar for inclusive economic growth. At sector level, the Agriculture and Agro-processing Master Plan (AAMP)**, specifically pillars 5 and 6,** notes the crucial role the agro-processing industry should play towards mitigating post-harvest losses, providing access to markets for farmers and ensuring household food security. At operational level, the competitive performance of agribusinesses is directly linked to the competitiveness of the industry and the sector.

Consequently, the Department of Agriculture, (DoA) established the Directorate: Agro-processing Support within the Branch: Economic Development, Trade and Marketing (EDTM) to develop and facilitate implementation of policies and strategies to enhance competitive performance of agro-processing agribusinesses. Among others, the function of the directorate is to provide timely and updated agro-processing economic and statistical information geared to monitor the performance of the industry and provide insight into the effects of economic policies and exogenous factors. To achieve this purpose, the directorate publishes a quarterly economic review of the agro-processing industry.

This publication, "*Quarterly Economic Review of the Agro-processing Industry in South Africa 2026: Q1",* by the directorate evaluates the economic performance of the eleven agro-processing divisions during 2026: Q1. These divisions, which are categorised consistent with the *Standard Industrial Classification,* are food products, beverages, tobacco, textiles, wearing apparel, leather and leather products, footwear, wood and wood products, paper and paper products, rubber products and furniture. The main economic indicators reviewed are the changes in prices, volume of production, value of sales, utilisation capacity by large enterprises, formal employment and trade balance.

Any comments and suggestions on the content of the publication are welcome.

Disclaimer: The Department of Agriculture did everything to ensure the accuracy of the information reported in this publication. The department will, however, not be held liable for the results of actions based on this publication.

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EXECUTIVE SUMMARY

The South African economy grew minimally by 0,5% in 2026: Q1, following a growth of 0,4% in 2025: Q4. Following a 0,2% contraction in the fourth quarter of 2025, the real gross value added (GVA) of the primary sector rebounded by 1,9% in the first quarter of 2026, supported by higher real output in both the agricultural and mining sectors. While the secondary sector remained in the negative territory, it continues to decline at a slower rate of 0,5% in 2026: Q1 (Reserve Bank, 2026).

In 2026: Q1, the year-on-year producer price inflation for final manufactured goods moderated by 2,1% from a growth of 2,9% in 2025: Q4. Food products moderated by 0,6%, therefore, meat, fish, fruit, vegetables, oils and fats; and meat and meat products moderated, however, grain mill products; and starches and starch products, animal feed decelerated; fruits and vegetables; and oils and fats contracted, sugar contracted further, fish and fish products, bakery products and beverages rose in 2026: Q1.

The year-on-year consumer price inflation for all items moderated by 3,1% in 2026: Q1 from a 3,5% growth in 2025: Q4. In 2026: Q1, the food products moderated by 3,4%, oils and fats similarly moderated, however, milk, other dairy products and eggs; and vegetables receded further, fruits and nuts decelerated, meat, sugar confectionary and desserts; and fish and other seafood rose, while cereal products contracted.

Food and non-alcoholic beverages, hot beverages, alcoholic beverages, spirits and liqueurs and wine moderated, while beer; and cold beverages rose in 2026: Q1.

In 2026: Q1, the agro-processing industry's seasonally adjusted volume of production contracted by 2,4%. The divisions that contracted during the period under review were beverages and rubber products; furniture, wearing apparel and paper and paper products divisions receded further; footwear and leather and leather products divisions decelerated; food products division rebounded; textiles division expanded and wood and wood products division remained unchanged as compared to the last quarter.

The seasonally adjusted value of sales receded further for the following divisions: food products, leather and leather products, footwear and paper and paper products, beverages, furniture and rubber products divisions contracted; wearing apparel and textiles divisions rebounded, while wood and wood products division moderated in 2026: Q1.

The utilisation capacity of the agro-processing sector decreased for the following divisions in 2026: Q1: food products, beverages, textiles, paper and paper products, furniture and

footwear; however, leather and leather products, wearing apparel and wood and wood products increased.

In 2026: Q1, the divisions that recorded a trade deficit during the period were wearing apparel, textiles, rubber products, footwear, furniture and leather and leather products. However, the following divisions registered a trade surplus during the period under review: beverages, paper and paper products, tobacco and food products.

In 2026, jobs were created in the following divisions: beverages (5 796), food products (3 727), wearing apparel (147), leather and leather products (61) and wood and wood products (42). However, paper and paper products (1 457), footwear (357), textiles (319), furniture (274) and rubber products (166) divisions shed jobs.

1. INTRODUCTION

In 2026: Q1, the economic activity in South Africa rose by 0,5% and the real output of the primary sector rebounded by 1,9% from a 0,2% contraction in 2025: Q4. The output of the secondary sector, however, decelerated by 0,8%, while that of the tertiary sector moderated by 0,6% (SA Reserve Bank, 2026).

This quarterly economic review of the agro-processing industry in South Africa assesses how the performance of the domestic economy during 2026: Q1 affected the producer price, consumer price, production volume, sales, capacity utilisation, trade and the employment of the agro-processing divisions. This quarterly review is organised as follows; firstly, is the introduction, followed by section two which summarises the state of the domestic economy during 2026: Q1. Section three provides the impact of the global and domestic economy on the eleven divisions of the agro-processing industry, which is followed by the conclusion.

2. STATE OF THE DOMESTIC ECONOMY

Table 1 below shows the South African growth rate at seasonally adjusted annualised rates. In 2026: Q1, the economy expanded minimally by 0,5% from a 0,4% growth registered in 2025: Q4. The real gross value added (GVA) of the primary sector recovered with an increase of 1,9% in 2026: Q1 after contracting by 0,2% in 2025: Q4. The real GVA by the agricultural sector expanded by 3,9% in 2026: Q1 following a 0,4% growth in 2025: Q4. This increase was attributed to higher production of field crops and horticultural products, aided by favourable La Niña-induced rainfall (SA Reserve Bank, 2026).

Table 1: South African economic growth rate (percentage change at seasonally adjusted annualised rates)

Sector	2025				2026	
	Q1	Q2	Q3	Q4	Year*	Q1
Primary sector	3,7	2,4	2,0	-0,2	6,4	1,9
Agriculture	16,4	1,2	1,4	0,4	17,4	3,9
Mining	-3,3	3,2	2,4	-0,6	0,2	0,7
Secondary sector	-1,9	0,8	-0,2	-0,9	-2,1	-0,5
Manufacturing	-1,4	1,2	0,2	-0,6	-4,4	-0,8
Construction	-3,6	-0,8	0,1	-1,3	2,3	0,2

Tertiary sector	0,1	0,6	0,2	0,7	2,3	0,6
Non-primary sector	-0,3	0,6	0,1	0,4	0,7	0,4
Non-agricultural sector	-0,4	0,8	0,3	0,4	0,7	0,4
Total	0,1	0,8	0,3	0,4	1,1	0,5

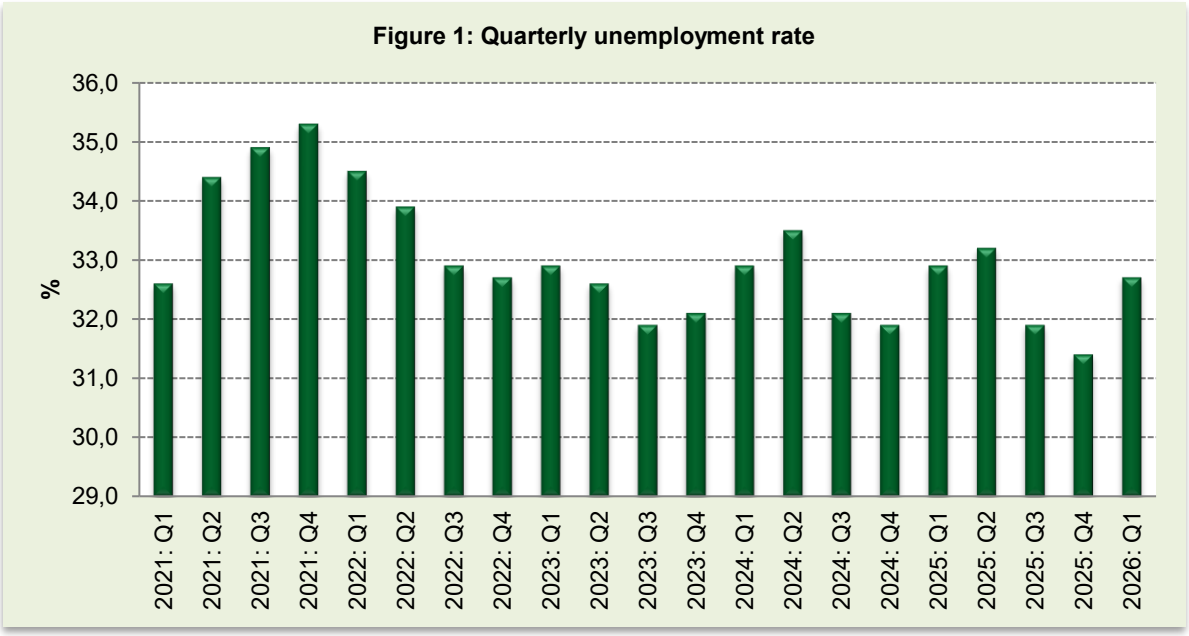
Source: SA Reserve Bank (2026)

**Percentage change over one year*

*** The non-primary sector is total GVA excluding agriculture and mining*

**** The non-agricultural sector is total GVA excluding agriculture*

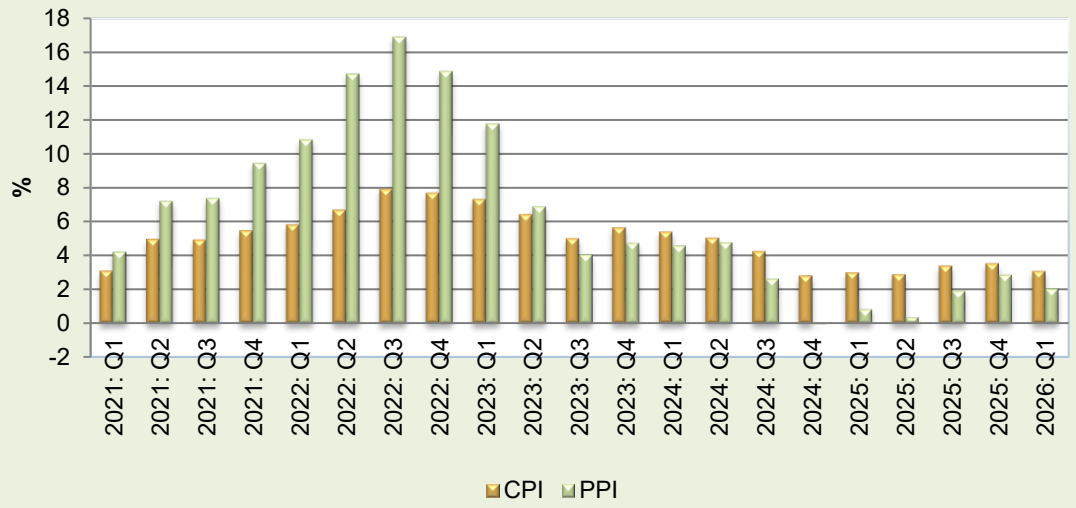
Figure 1: Quarterly unemployment rate



Source: Statistics SA (2026)

In 2026: Q1, South Africa's unemployment rate rose to 32,7% as compared to a 31,4% in the preceding quarter, which translates to an increase of 1,3 percentage points. The largest decreases in employment were recorded in the community and social services industry (206 000), followed by construction (110 000), transport (30 000) and private households (28 000) industries. Increases in employment were recorded in manufacturing (38 000), followed by mining (32 000) and agriculture (10 000) industries (Stats SA, 2026).

Figure 2: Total CPI and PPI inflation



Source: Statistics SA (2026)

Figure 2 above presents the producer price index and consumer price index from 2021: Q1 to 2026: Q1. In 2026: Q1, the year-on-year producer price inflation for final manufactured goods moderated by 2,1% from a growth of 2,9% in 2025: Q4. Food products moderated by 0,6%, therefore, meat, fish, fruit, vegetables, oils and fats (5,1%) and meat and meat products (10,7%) moderated, however, grain mill products (8,8%) and starches and starch products, animal feed (12,1%) decelerated, fruits and vegetables (0,4%) and oils and fats (2,2%) contracted, sugar contracted further (11,4%), fish and fish products (5,1%), bakery products (3,9%) and beverages (4,4%) rose in 2026: Q1.

The year-on-year consumer price inflation for all items moderated by 3,1% in 2026: Q1 from a 3,5% growth in 2025: Q4. In 2026: Q1, the food products moderated by 3,4% from a 4,1% growth in 2025: Q4. Oils and fats (3,8%) similarly moderated, however, milk, other dairy products and eggs (0,8%) and vegetables (2,7%) receded further, fruits and nuts (6,9%) decelerated, meat (11,9%), sugar confectionary and desserts (3,1%) and fish and other seafood (11,9%) rose, while cereal products (0,5%) contracted.

Food and non-alcoholic beverages (3,5%), hot beverages (7,9%), alcoholic beverages (4,5%), spirits and liqueurs (2,6%) and wine (4,2%) moderated, while beer (5,6%) and cold beverages (2,7%) rose in 2026: Q1.

3. THE AGRO-PROCESSING INDUSTRY

The FAO (1997) defines agro-processing as a subset of manufacturing that processes raw materials and intermediate products derived from the agricultural sector. Therefore, the agro-processing industry transforms products originating from the agriculture, forestry and fisheries sectors. According to the Standard Industrial Classification, the agro-processing industry comprises of the following 11 divisions: food products, beverages, tobacco, textiles, wearing apparel, leather and leather products, footwear, paper and paper products, wood and wood products, rubber products and furniture. This section reviews the economic performance of these divisions during 2026: Q1 as influenced by the global and domestic economic environments.

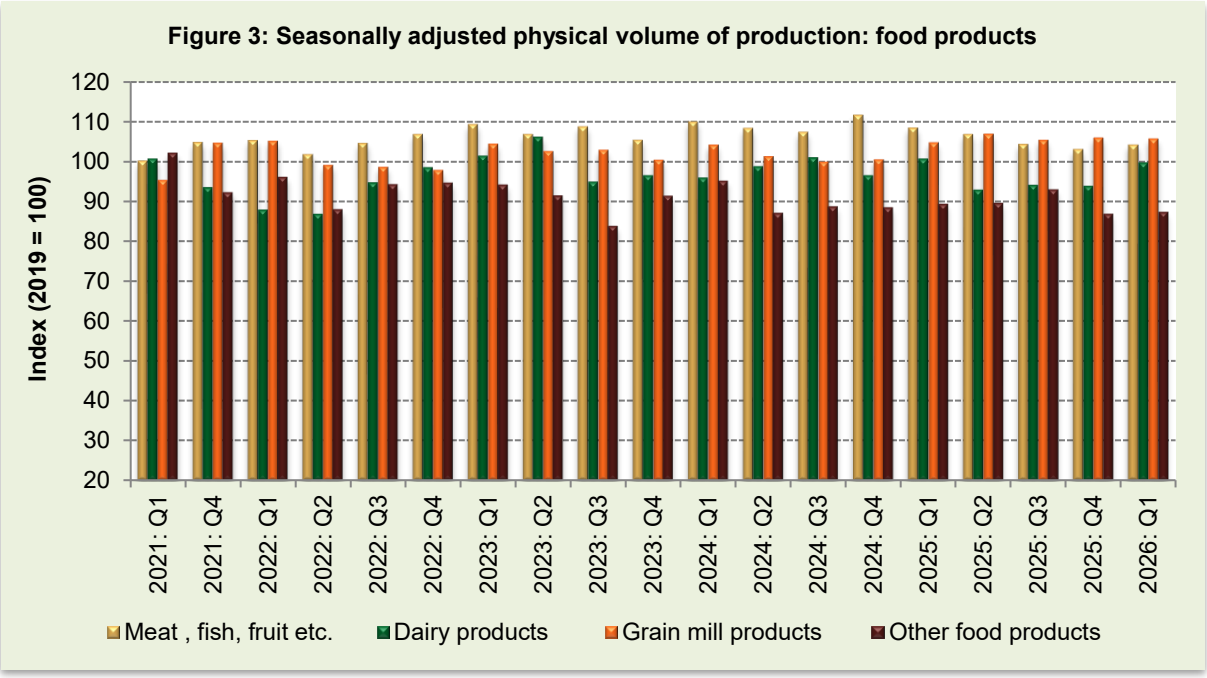
3.1 FOOD

Table 2 below shows the producer price index for food products in 2026: Q1. The quarter-to-quarter price index for food products decelerated by 0,7%, however, it moderated by 0,6% year-on-year in 2026: Q1.

Table 2: Producer price index for food products (base 2023=100)

Indices			% Change between	
2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
105,0	106,3	105,6	0,6	0,7

Source: Statistics SA, 2026



Source: Quantec, 2026

Figure 3 above shows the quarter-to-quarter seasonally adjusted physical volume of production for food products. In 2026: Q1, the quarter-to-quarter seasonally adjusted volume of production for meat, fish, fruit, etc.; dairy products and "other food products" rebounded by 1,1%, 6,3% and 0,6% from a contraction of 1,2%, 0,2% and 6,6%, respectively in 2025: Q4, however, "grain mill products" contracted by 0,2% following a 0,5% growth in 2025: Q4.

In terms of year-on-year, meat, fish, fruit, etc. and dairy products receded further by 4,0% and 1,0%, respectively, grain mill products contracted by 0,2% and "other food products" decelerated by 2,2%, in 2025: Q1.

The division as a whole rebounded quarter-to-quarter by 1,9% in 2026: Q1, following a 1,8% contraction in 2025: Q4, however, it receded further by 1,6% year-on-year.

Table 3: Utilisation and reasons for underutilisation of production capacity by large enterprises: Food (percentage)

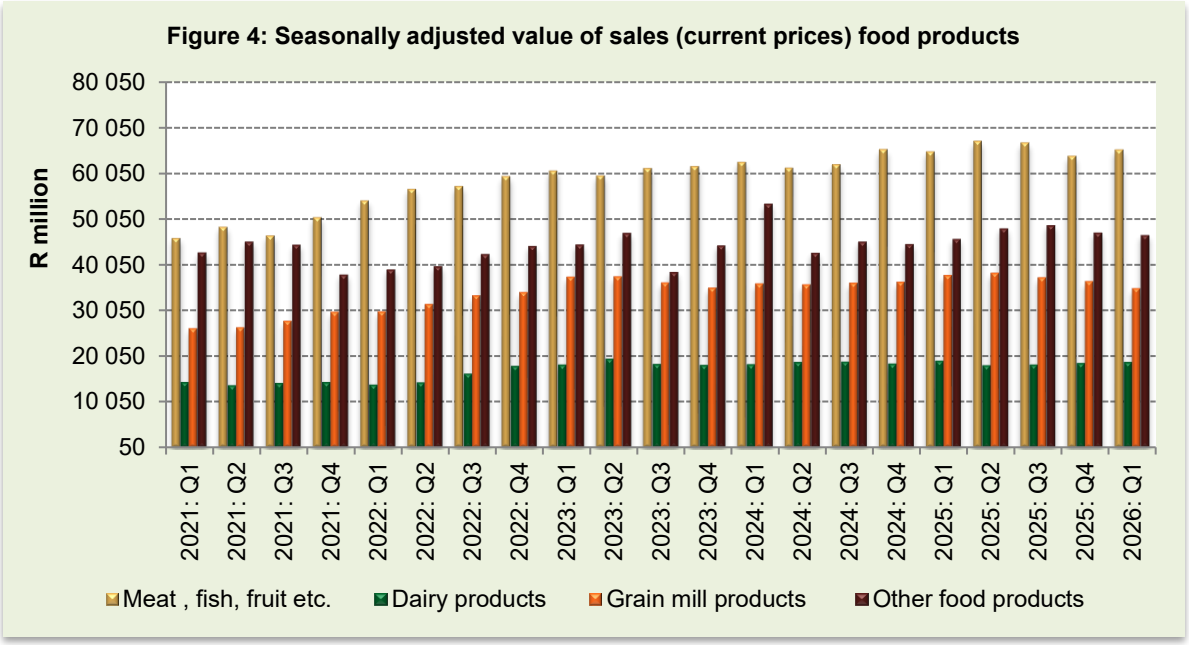
Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour:			
				Skilled	Semi and unskilled		

2025: Q1	77,5	22,5	3,8	0,6	0,1	9,8	8,1
2025: Q4	82,8	17,2	2,1	0,6	0,2	9,1	5,2
2026: Q1	77,1	22,9	3,7	0,7	0,2	10,8	7,4

Source: Statistics SA (2026)

Table 3 above presents utilisation and reasons for underutilisation of production capacity by large enterprises for the food products division. In 2026: Q1, the utilisation capacity by large enterprises in the food products division increased year-on-year by 0,4 percentage points. However, the quarter-to-quarter utilisation capacity decreased by 5,7 percentage points. Insufficient demand remains the main reason for underutilisation, followed by a shortage of raw materials.

Figure 4: Seasonally adjusted value of sales (current prices) food products



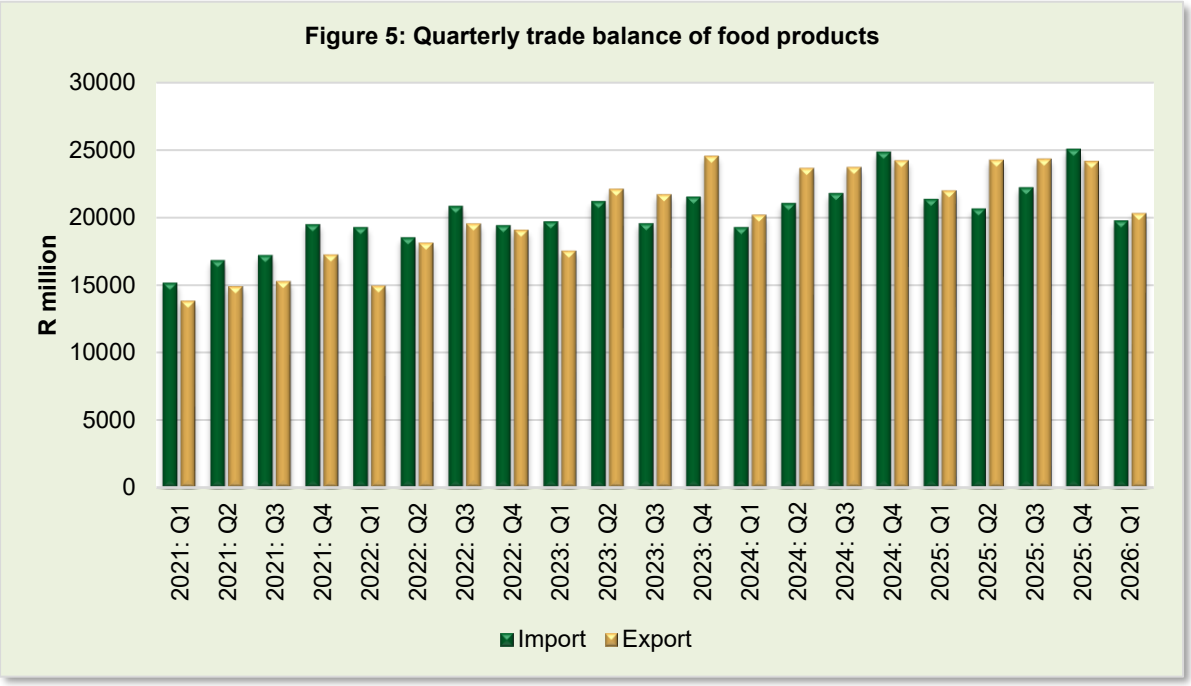
Source: Quantec, 2026

Figure 4 above shows the seasonally adjusted value of sales for the food division. In 2026: Q1, the quarter-to-quarter seasonally adjusted value of sales for meat, fish, fruit, etc. rebounded by 2,2% from a 4,4% contraction in the preceding quarter; dairy products moderated by 1,1% from a 2,0% growth in the last quarter; grain mill products decelerated by 4,2% from a 2,3% contraction in the last quarter and “other food products” receded further by 1,3% as compared to a 3,3% contraction in the last quarter.

In terms of year-on-year, sales of meat, fish, fruit, etc. rebounded by 0,7%; dairy products and grain mill products contracted by 1,4% and 7,6%, respectively, while sales of other food products moderated by 1,8% in 2026: Q1.

Sales of food products division as a whole receded further quarter-to-quarter by 0,3% from a 2,9% contraction in 2025: Q4. However, the division contracted by 1,1% year-on-year. Therefore, sales for the division as a whole decreased from R165 419,1 million in 2025: Q4 to R164 888,8 million in 2026: Q1.

Figure 5: Quarterly trade balance of food products

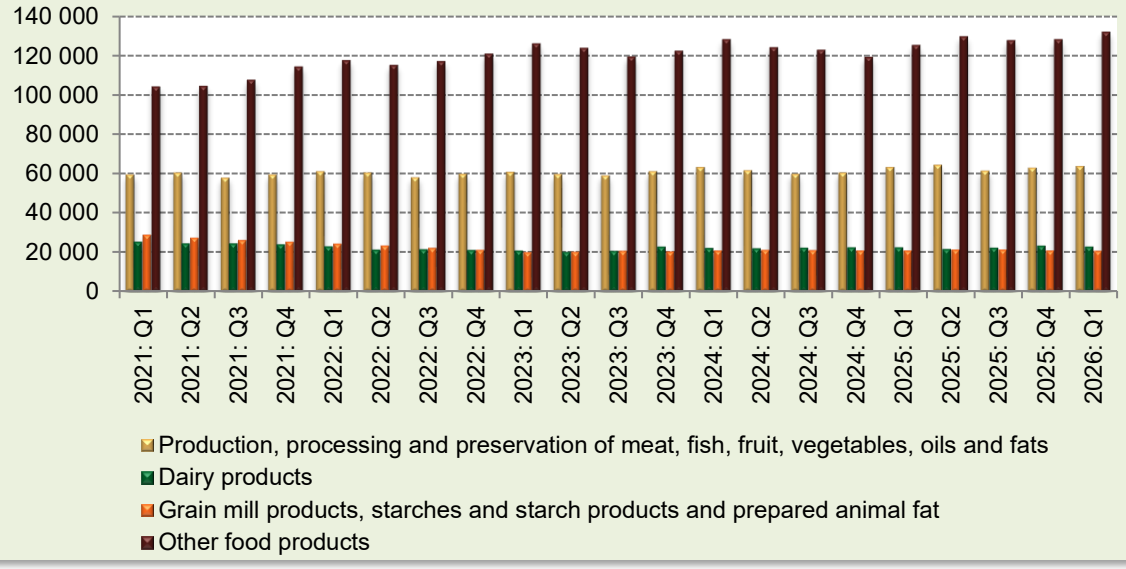


Source: Quantec, (2026)

Figure 5 above shows the trade balance of the food products division from 2021: Q1 to 2026: Q1. In 2026: Q1, the quarter-to-quarter exports of food products contracted by 15,9% from a 0,7% contraction in 2025: Q4, however, food imports contracted by 21,1% from a 12,7% growth in 2025: Q4.

The year-on-year food exports decelerated by 7,6%, while imports contracted by 7,4%. Therefore, a trade surplus of R570,8 million was registered in 2026: Q1 from a trade deficit of R844,7 million in 2025: Q4.

Figure 6: Number of formal employment: food products



Source: Quantec, 2026

Figure 6 above shows the employment in the food products division from 2021: Q1 to 2026: Q1. In 2026: Q1, the quarter-to-quarter formal employment in the production, processing and preservation of meat, fish, fruit, vegetables, oils and fats moderated by 1,2% following a 2,4% growth in 2025: Q4; dairy products contracted by 2,5% from a 4,9% growth in 2025: Q4; grain mill products receded further by 1,2% from a 1,7% contraction in 2025: Q4 and “other food products” rose by 3,0% as compared to 2025: Q4.

In terms of year-on-year, employment in meat, fish, fruit, vegetables, oils and fats, dairy and “other food products” moderated by 0,7%, 1,1% and 5,3%, respectively, however, grain mill products contracted by 0,8% in 2026: Q1.

Employment for the food division as a whole rose by 1,6% quarter-to-quarter from a 1,1% growth in 2025: Q4, however, the division moderated by 3,1% year-on-year. Therefore, approximately 3 727 jobs were gained in 2026: Q1.

3.2 BEVERAGES

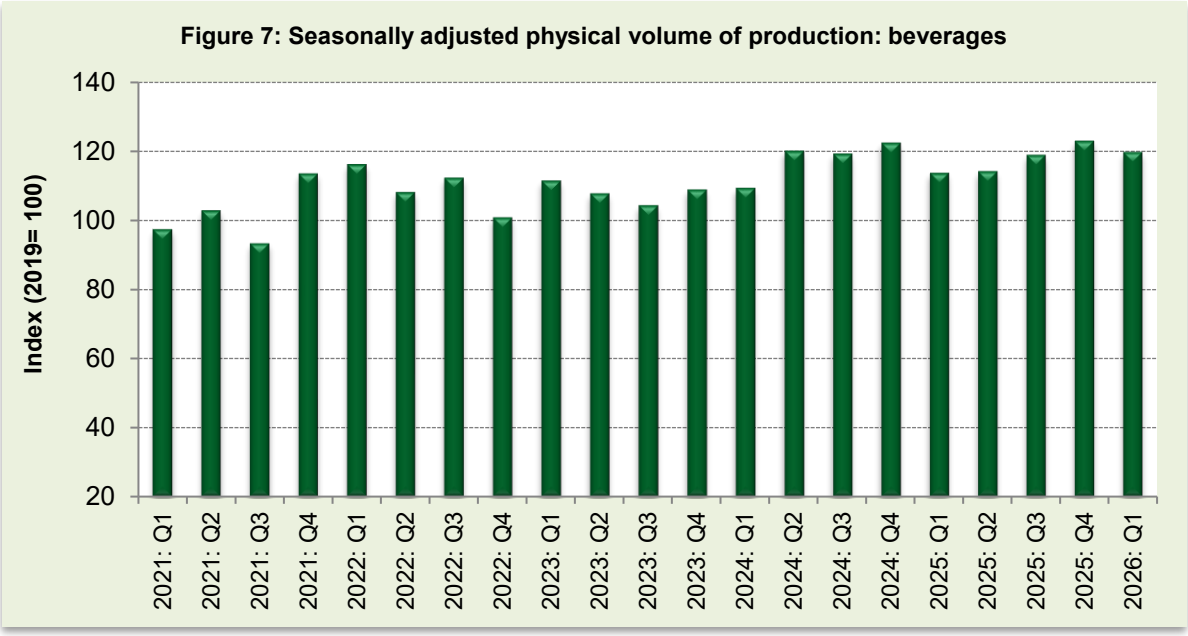
Table 4 below shows the producer price index for the beverages division in 2026: Q1. The quarter-to-quarter producer price index for beverages rose by 0,9% in 2026: Q1 as compared to the last quarter. Similarly, the producer price index of the beverages division rose by 4,4% year-on-year.

Table 4: Producer price index for beverages products (base 2023=100)

Indices			% Change between	
2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
105,0	107,6	107,8	4,4	0,9

Source: Statistics SA, 2026

Figure 7: Seasonally adjusted physical volume of production: beverages



Source: Quantec, 2026

Figure 7 above shows the quarter-to-quarter seasonally adjusted physical volume of production for the beverages division. In 2026: Q1, the seasonally adjusted volume of production for the beverages division contracted by 2,7%, following a 3,5% growth in 2025: Q4. However, the division expanded by 5,3% year-on-year.

Table 5: Utilisation and reasons for underutilisation of production capacity by large enterprises: Beverages (percentage)

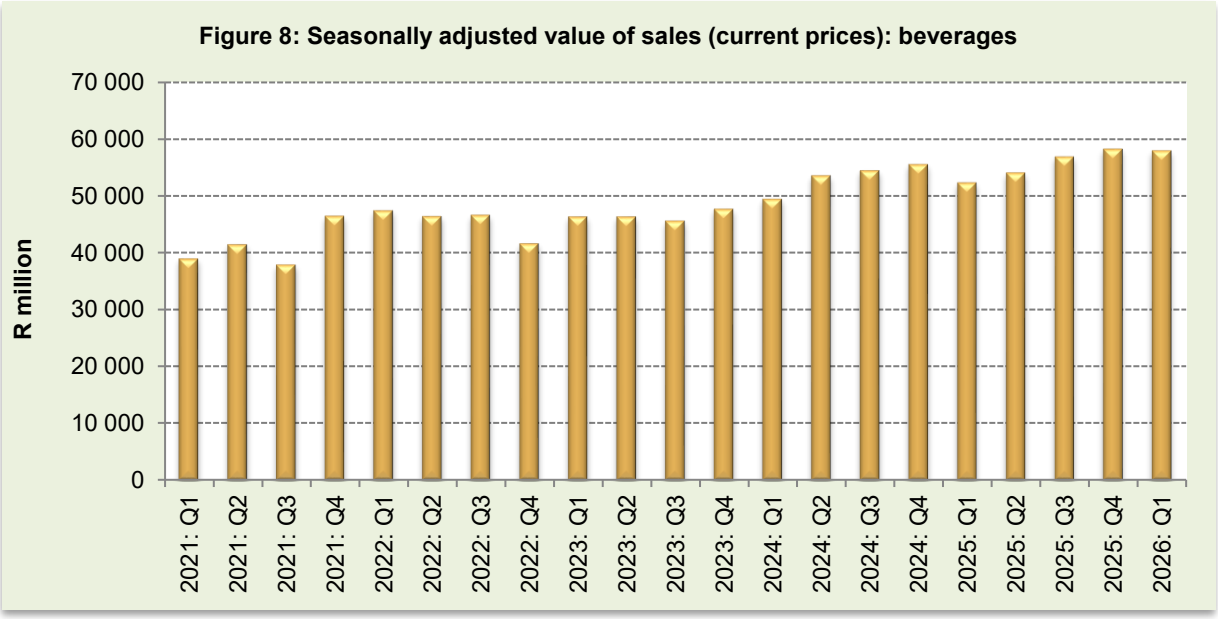
Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour			
				Skilled	Semi and unskilled		

2025: Q1	82,2	17,8	2,0	3,2	0,3	9,8	2,6
2025: Q4	83,6	16,4	2,6	3,3	0,2	7,7	2,7
2026: Q1	81,9	18,1	2,6	3,2	0,2	9,4	2,6

Source: Statistics SA (2026)

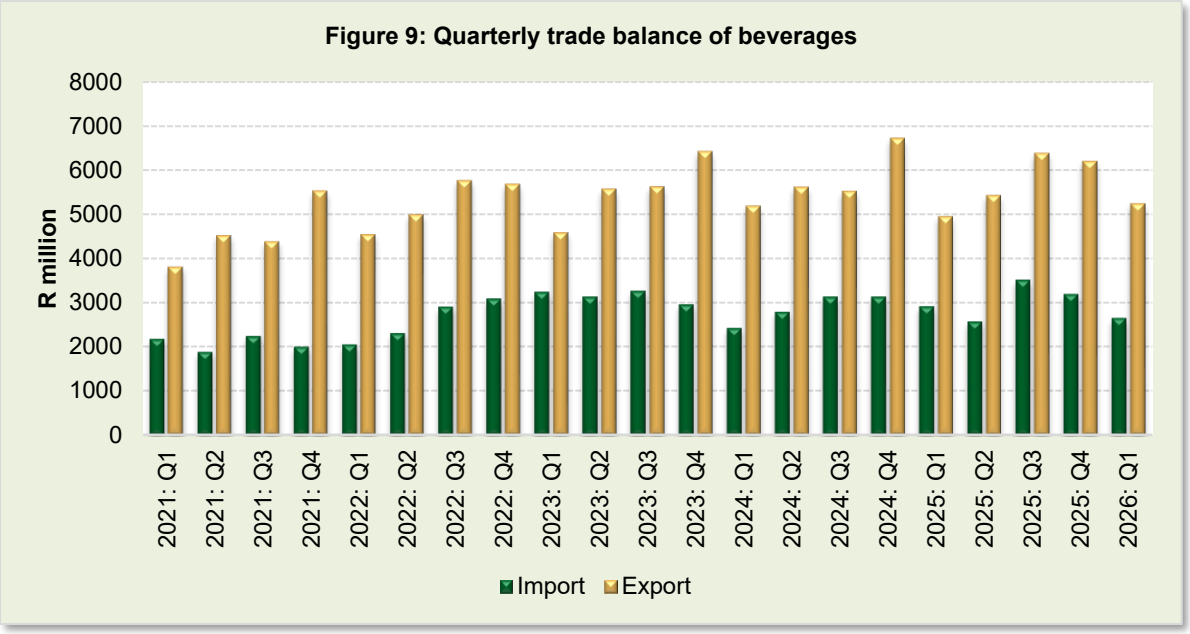
Table 5 above shows the utilisation of production capacity by large enterprises in the beverages division. The utilisation of production capacity decreased year-on-year and quarter-to-quarter by about 0,3 and 1,7 percentage points, respectively, in 2026: Q1. Insufficient demand remains the main reason for underutilisation during the period, followed by a shortage of skilled labour.

Figure 8: Seasonally adjusted value of sales (current prices): beverages



Source: Quantec, 2026

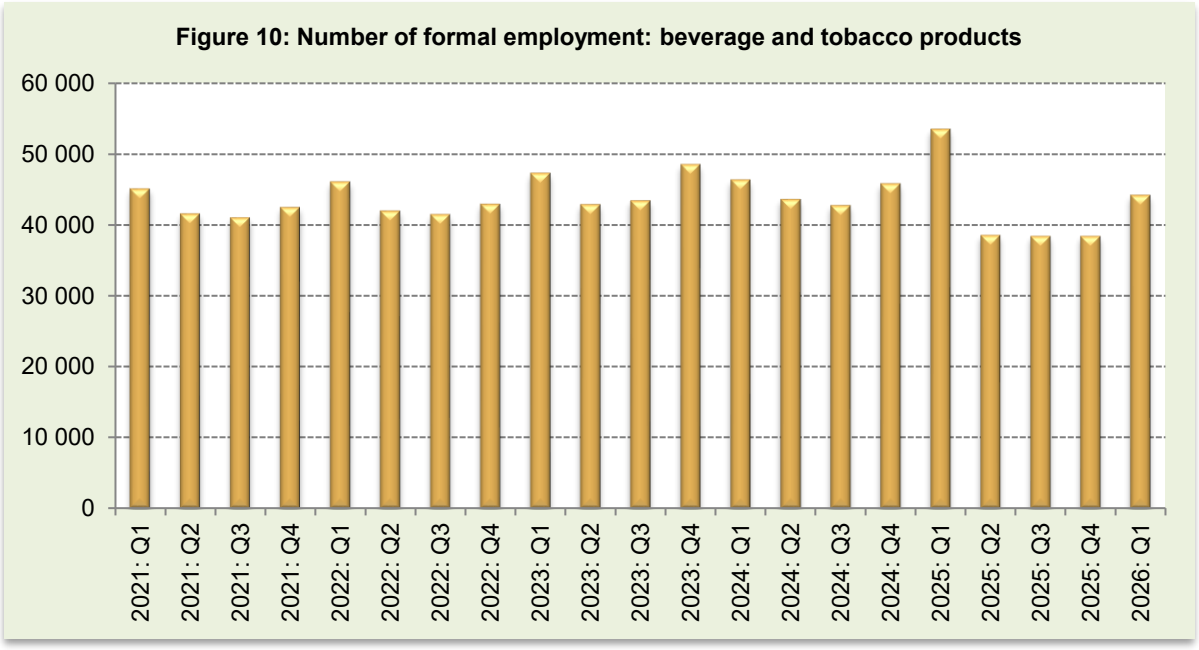
Figure 8 above shows the seasonally adjusted value of sales for the beverages division in 2026: Q1. In 2026: Q1, the seasonally adjusted value of sales for the beverages division contracted by 0,5% from a 2,4% growth in 2025: Q4, however, the division rose by 10,8% year-on-year. Therefore, sales for the beverages division decreased from R58 302,9 million in 2025: Q4 to R58 026,1 million in 2026: Q1.



Source: Quantec, 2026

As Figure 9 shows, in 2026: Q1, the quarter-to-quarter exports of the beverages division decelerated by 15,5% following a contraction of 2,8% in 2025: Q4. Beverages imports, similarly, decelerated by 17,0% following a 9,1% contraction in 2025: Q4.

The year-on-year exports of beverages rebounded by 5,8%, while imports contracted by 9,1% in 2026: Q1. As a result, the trade surplus of the beverages division narrowed from R3 030,9 million in 2025: Q4 to R2 607,4 million in 2026: Q1.



Source: Statistics SA, (2026)

After registering no growth in 2025: Q4, the quarter-to-quarter employment in the beverages and tobacco products division expanded by 15,1% in 2026: Q1, however, the division decelerated by 17,4% year-on-year. As a result, the division created a further 5 796 jobs in 2026: Q1 as illustrated in Figure 10.

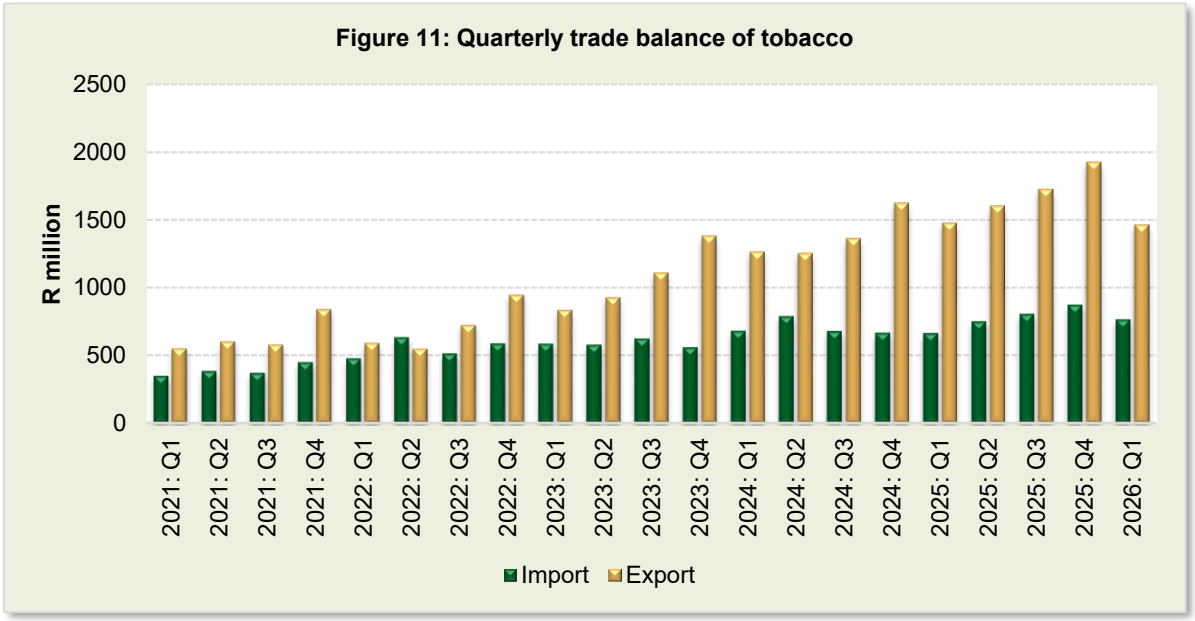
3.3 TOBACCO

Table 6 below shows the producer price index for the tobacco products division. The quarter-to-quarter and year-on-year producer price index of tobacco products rose by 2,2% and 6,3%, respectively, in 2026: Q1.

Table 6: Producer price index for tobacco products (base 2023=100)

Indices			% Change between	
2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
104,1	108,3	110,7	6,3	2,2

Source: Statistics SA (2026)



Source: Quantec, 2026

Figure 11 shows the trade balance of the tobacco division. In 2026: Q1, the quarter-to-quarter tobacco exports and imports contracted by 24,0% and 12,4% from a 11,4% and 8,5% growth in 2025: Q4, respectively.

The year-on-year tobacco division exports contracted by 0,9%; imports, however, moderated by 14,9%. Therefore, the trade surplus of the division narrowed from R1 055,9 million in 2025: Q4 to R703,3 million in 2026: Q1.

3.4 TEXTILES

Table 7 presents the producer price index for textiles during 2026: Q1. The quarter-to-quarter producer price index for textiles rose by 5,4% in 2026: Q1. Similarly, it rose by 5,4% year-on-year.

Table 7: Producer price index for textiles (base 2023=100)

	Indices			% Change between	
	2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
Textiles	112,9	112,9	119	5,4	5,0

Source: Statistics SA (2026)

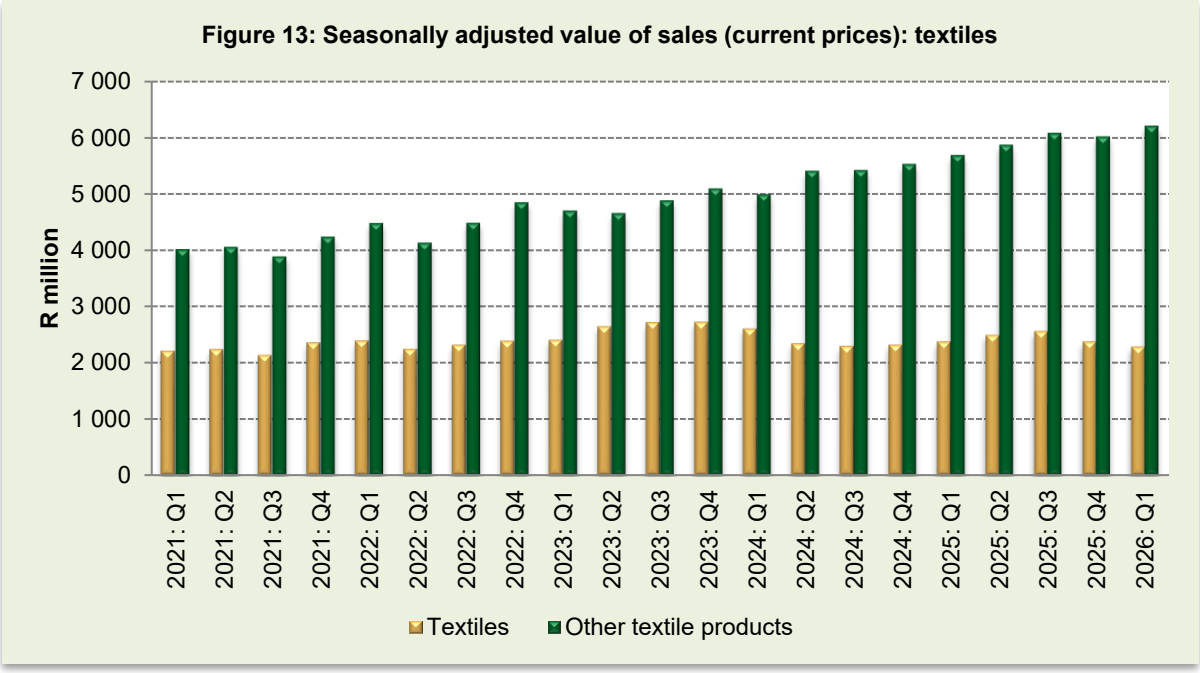
Figure 12: Seasonally adjusted physical volume of production: textiles

Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter seasonally adjusted volume of production for the textiles division moderated by 3,5% following a 4,7% growth in 2025: Q4. “Other textiles”, on the other hand, rebounded by 0,3% from a 2,3% contraction registered in 2025: Q4.

In terms of year-on-year, the textiles division rose by 16,9%, while the “other textiles” division moderated by 3,3%.
The division as a whole expanded quarter-to-quarter by 1,9% from a 1,2% growth in 2025: Q4, similarly, the division expanded by 9,9% year-on-year (see Figure 12).

Figure 13: Seasonally adjusted value of sales (current prices): textiles



Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter seasonally adjusted value of sales for the textiles division receded further by 3,6% from a 7,2% contraction in 2025: Q4, other textiles” rebounded by 3,1% following a 1,1% contraction in 2025: Q4.

In terms of year-on-year, the textiles division contracted by 3,8%, while “other textiles’’ rose by 9,1% in 2026: Q1.

The division as a whole rebounded quarter-to-quarter by 1,2% in 2026: Q1 from a 2,9% contraction in 2025: Q4, however, the division moderated by 5,3% year-on-year. Therefore, sales for the textiles division as a whole increased from R8 377,2 million in 2025: Q4 to R8 477,1 million in 2026: Q1, as illustrated in Figure 13.

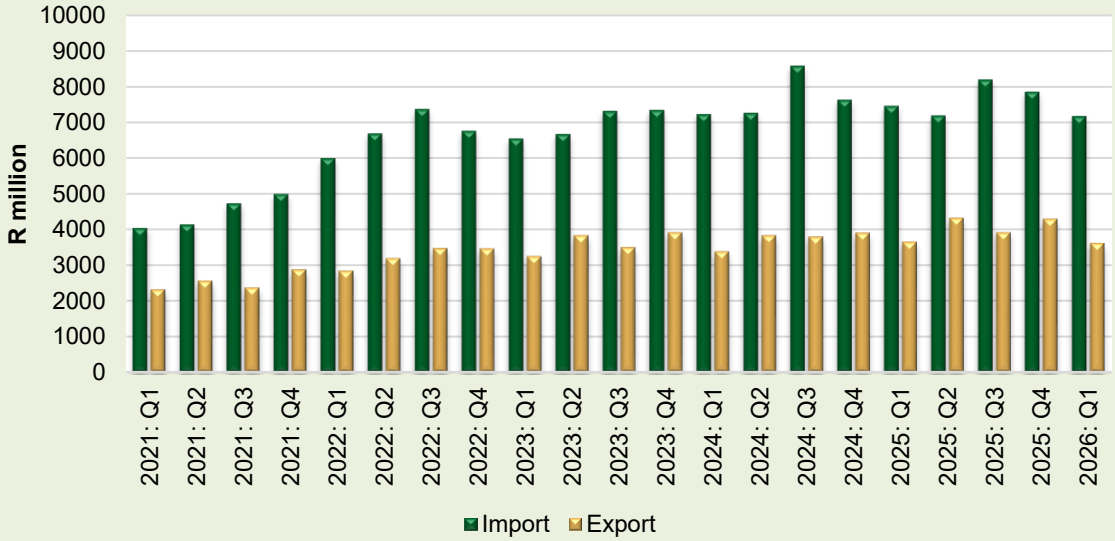
Table 8: Utilisation and reasons for underutilisation of production capacity by large enterprises: Textiles (percentage)

Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour:			
				Skilled	Semi and unskilled		
2025: Q1	67,3	32,7	2,2	0,6	0,2	23,2	6,5
2025: Q4	67,5	32,5	2,1	1,1	0,1	20,7	8,6
2026: Q1	66,6	33,4	2,4	1,2	0,1	22,1	7,6

Source: Statistics SA (2026)

Table 8 presents the utilisation of production capacity by large enterprises in the textiles division in 2026: Q1. The year-on-year utilisation of production capacity decreased by 0,7 percentage points. Similarly, it decreased quarter-to-quarter by 0,9 percentage points. Insufficient demand remains the main reason for the underutilisation of production capacity by large enterprises of the textiles division, followed by other reasons such as seasonal factors.

Figure 14: Quarterly trade balance of textiles



Source: Quantec, 2026

Figure 14 above shows the quarterly trade balance of the textiles division. In 2026: Q1, the quarter-to-quarter textiles exports contracted by 15,8% following a 9,6% growth in 2025: Q4, however, the textile imports decelerated by 8,7% as compared to a 4,1% contraction in 2025: Q4.

The year-on-year exports of textiles division contracted by 1,1%, imports, similarly, contracted by 3,8% in 2026: Q1. As a result, the trade deficit of the textiles division narrowed from R3 578,5 million in 2025: Q4 to R3 571,4 million in 2026: Q1.

Figure 15: Number of formal employment: textiles

Source: Quantec, 2026

In 2026: Q1, quarter-to-quarter employment in the “other textiles” division contracted by 0,9% as compared to a 0,3% growth in 2025: Q4. The preparation and spinning of textile fibre; weaving of textiles division, however, receded further by 1,7% following a contraction of 4,3% in 2025: Q4.

The year-on-year employment in “other textiles” division moderated by 0,1%, while that of the preparation and spinning of textiles fibre; weaving of textiles division receded further by 4,4% in 2026: Q1.

Employment of the textile division as a whole decelerated quarter-to-quarter by 1,1% following a 0,7% contraction in 2025: Q4. Similarly, it decelerated by 0,9% year-on-year. As a result, approximately 319 jobs were shed in 2026: Q1.

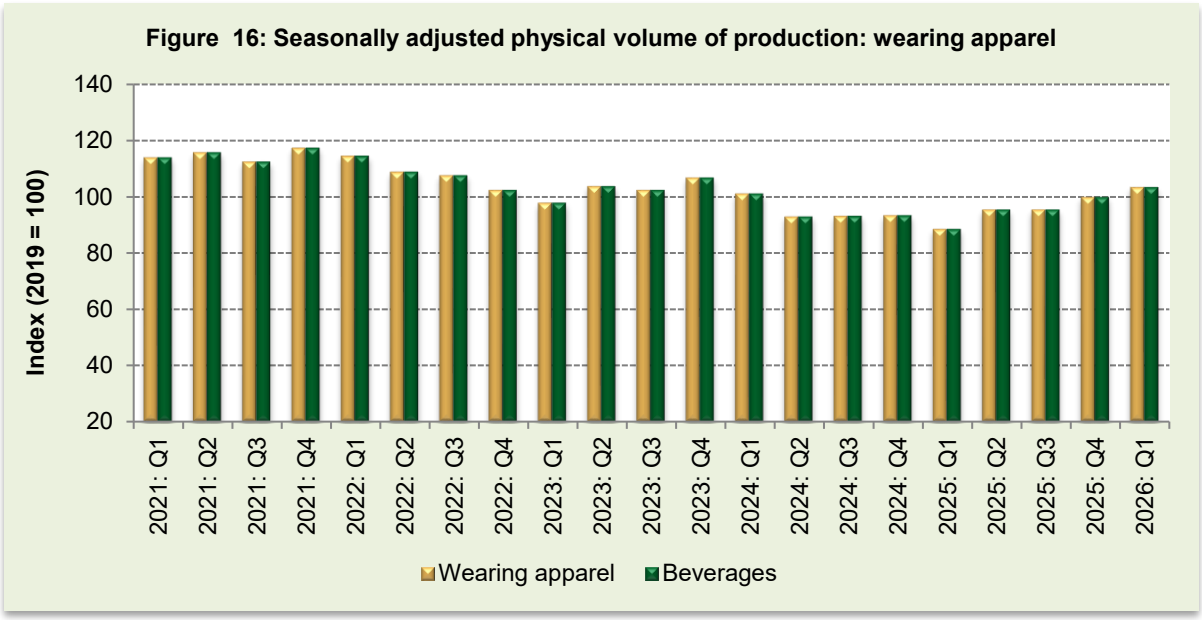
3.5 WEARING APPAREL

Table 9 below shows the producer price index for the wearing apparel division in 2026: Q1. The quarter-to-quarter producer price index for wearing apparel rebounded by 0,6%. However, it moderated by 2,0% year-on-year in 2026: Q1.

Table 9: Producer price index for wearing apparel (base 2023=100)

	Indices			% Change between	
	2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
Domestic output					
Wearing apparel	105,6	107,1	107,7	2,0	0,6

Source: Statistics SA (2026)



Source: Quantec, 2026

Figure 16 shows the seasonally adjusted physical volume of production for wearing apparel. In 2026: Q1, the quarter-to-quarter seasonally adjusted volume of production for the wearing apparel division rebounded by 0,5% as compared to a contraction of 2,8% in 2025: Q4. The knitted, crocheted articles division, however, receded further by 6,2% from a contraction of 6,6% in 2025: Q4.

The year-on-year seasonally adjusted physical volume of production for the wearing apparel and knitted, crocheted articles divisions decelerated by 0,6% and 12,8%, respectively, in 2026: Q1.

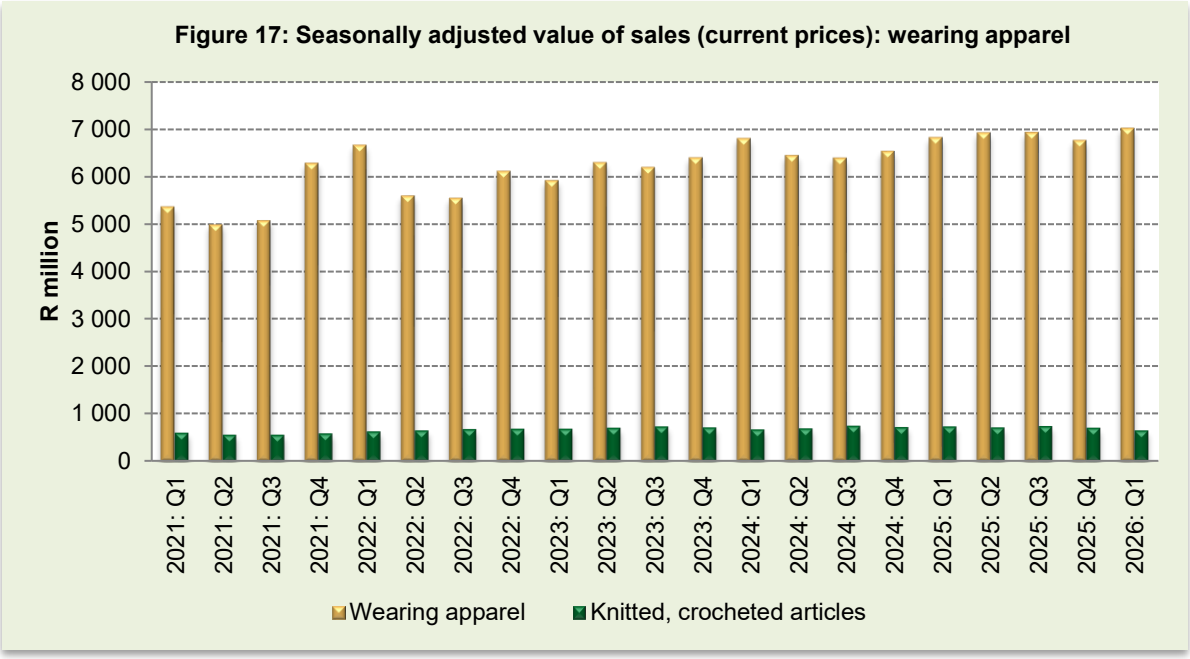
The division as a whole receded further quarter-to-quarter by 2,7% from a 4,7% contraction in 2025: Q4, similarly, the division decelerated by 6,7% year-on-year in 2026: Q1.

Table 10: Utilisation and reasons for underutilisation of production capacity by large enterprises: Wearing apparel (percentage)

Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour:			
				Skilled	Semi and unskilled		
2025: Q1	74,7	25,3	0,7	1,3	0,4	18,5	4,3
2025: Q4	74,8	25,2	0,4	1,3	0,4	18,8	4,3
2026: Q1	74,7	25,3	0,4	1,3	0,4	18,8	4,4

Source: Statistics SA (2026)

Table 10 shows the percentage of utilisation and reasons for underutilisation of production capacity by large enterprises for the wearing apparel division in 2026: Q1. In 2026: Q1, the year-on-year utilisation of production capacity remained unchanged as compared to 2025: Q1 however, it decreased quarter-to-quarter by 0,1 percentage points. Insufficient demand remained the key reason for underutilisation of production capacity, followed by other reasons such as seasonal factors.

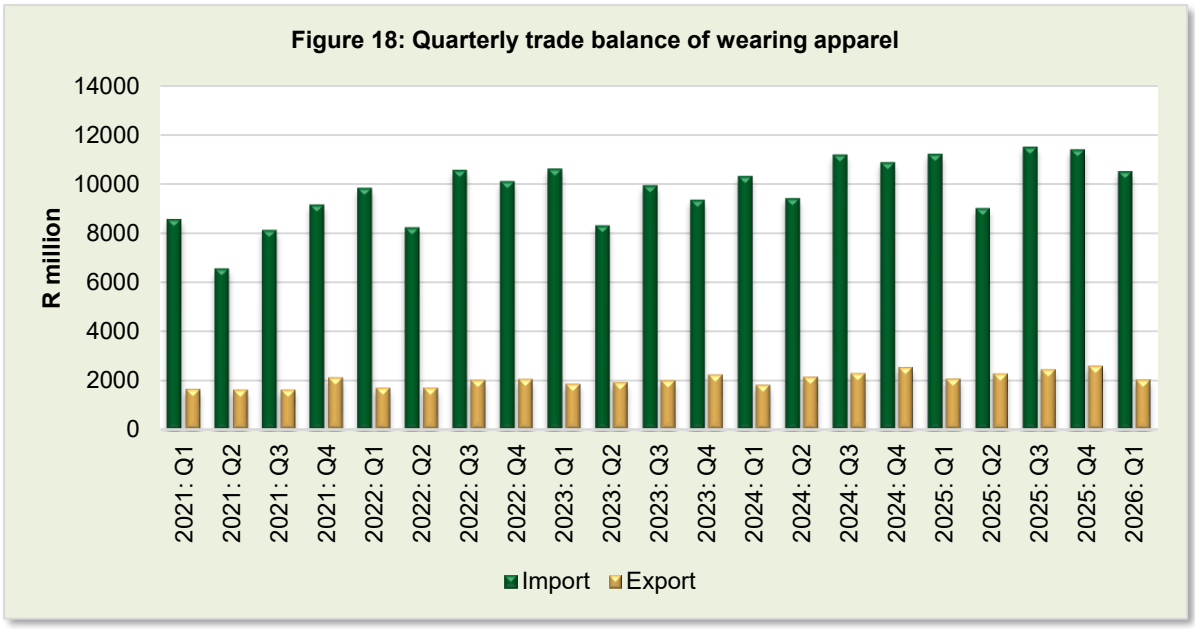


Source: Quantec, 2026

Figure 17 presents the seasonally adjusted value of sales for the wearing apparel division in 2026: Q1. In 2026: Q1, the quarter-to-quarter seasonally adjusted value of sales for the knitted, crocheted articles division decelerated by 8,2% from a 4,2% contraction in 2025: Q4; the wearing apparel division, on the other hand, rebounded by 3,8% in 2026: Q1 following a 2,5% contraction in 2025: Q4.

The seasonally adjusted value of sales for wearing apparel division decelerated year-on-year by 11,7%, while the knitted, crocheted articles division moderated by 2,9%.

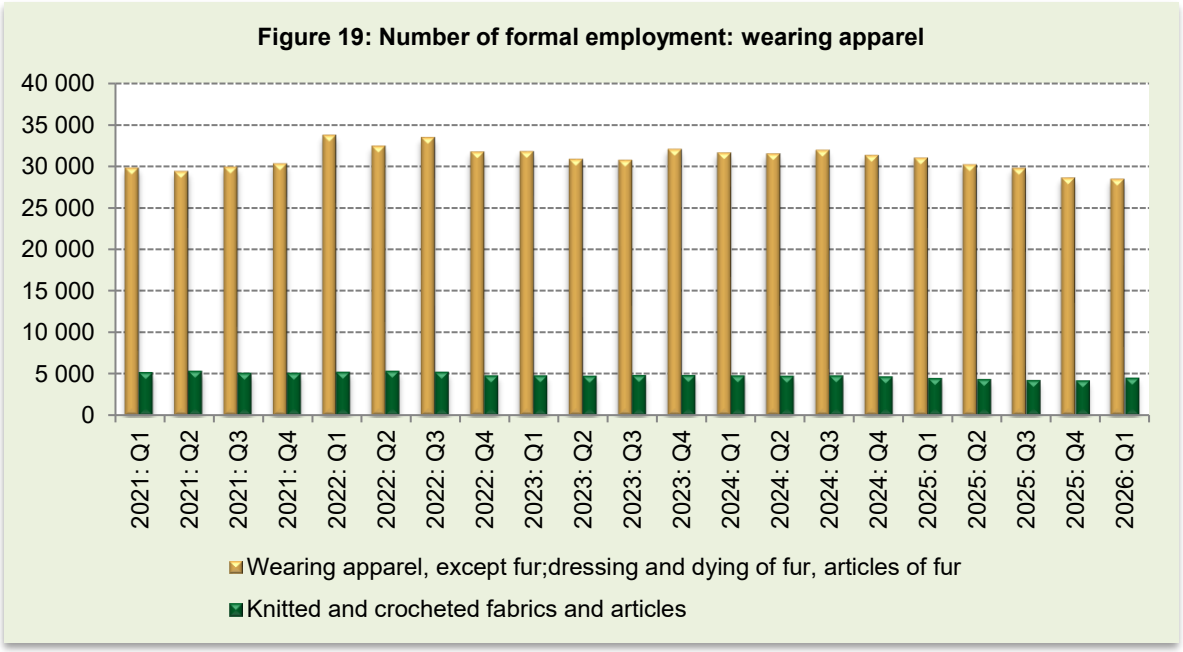
The seasonally adjusted value of sales for wearing apparel division as a whole rebounded by 2,7% quarter-to-quarter in 2026: Q1 as compared to a 2,7% contraction in 2025: Q4, however, the division moderated by 1,5% year-on-year. The sales in the wearing apparel division as a whole decreased from R7 453,2 million in 2025: Q4 to R7 655,3 million in 2026: Q1.



Source: Quantec, 2026

Figure 18 shows the quarterly trade balance for the wearing apparel division. In 2026: Q1, the quarter-to-quarter exports of wearing apparel contracted by 21,6% from a 5,8% growth in 2025: Q4, however, imports decelerated by 7,8% from a 1,0% contraction in 2025: Q4.

The year-on-year exports and imports contracted by 2,0% and 6,3%, respectively, in 2026: Q1. As a result, the trade deficit narrowed from R8 808,5 million in 2025: Q4 to R8 479,9 million in 2026: Q1.



Source: Statistics SA (2026)

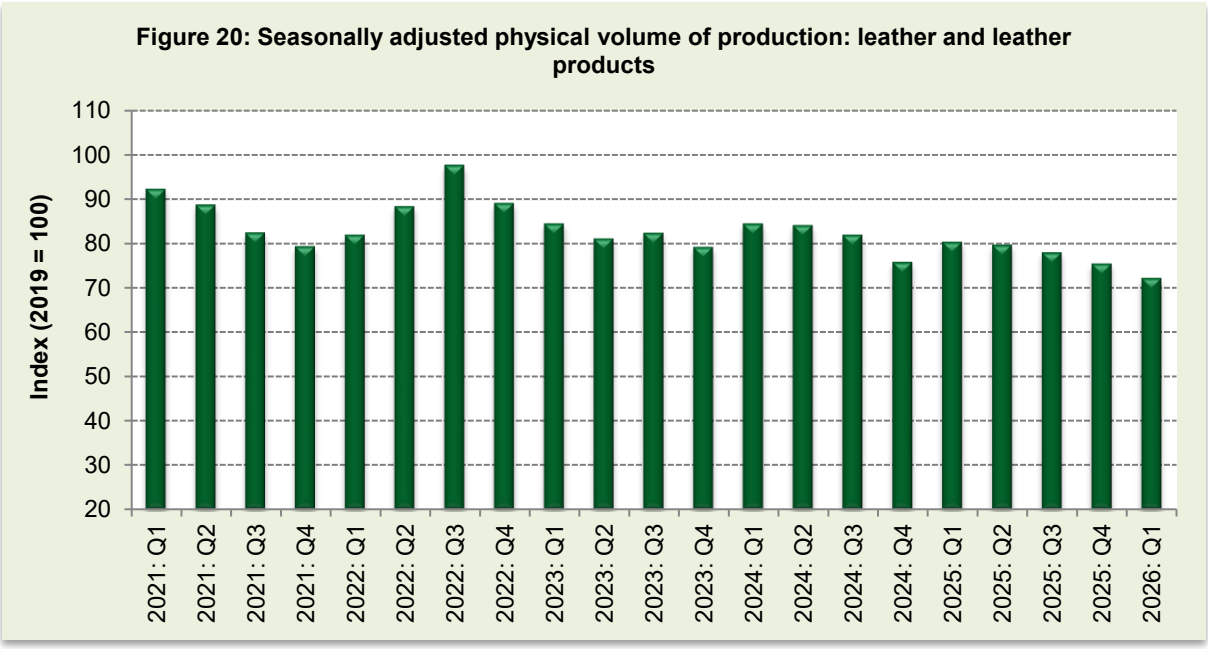
2026: Q1, the quarter-to-quarter formal employment for the knitted, crocheted articles and wearing apparel divisions, except the fur division, rebounded by 7,3% following a 0,7% contraction in 2025: Q4, however, wearing apparel division receded further by 0,5% in 2026: Q1 from a 3,9% contraction in 2025: Q4.

The year-on-year knitted, crocheted fabric and articles and wearing apparel divisions, except the fur division, rebounded by 0,8%, while wearing apparel division receded further by 8,2% in 2026: Q1.

The division as a whole rebounded quarter-to-quarter by 0,4% following a 3,5% contraction in 2025: Q4, however, the whole division receded further by 7,1% year-on-year. As a result, approximately 147 jobs were created in 2026: Q1.

3.6 LEATHER AND LEATHER PRODUCTS

Figure 20: Seasonally adjusted physical volume of production: leather and leather products



Source: Quantec, 2026

In 2026: Q1, the seasonally adjusted physical volume of production for the leather and leather products division decelerated by 4,2% from a 3,3% contraction in 2025: Q4. Similarly, the division decelerated by 10,1% year-on-year as depicted in Figure 20.

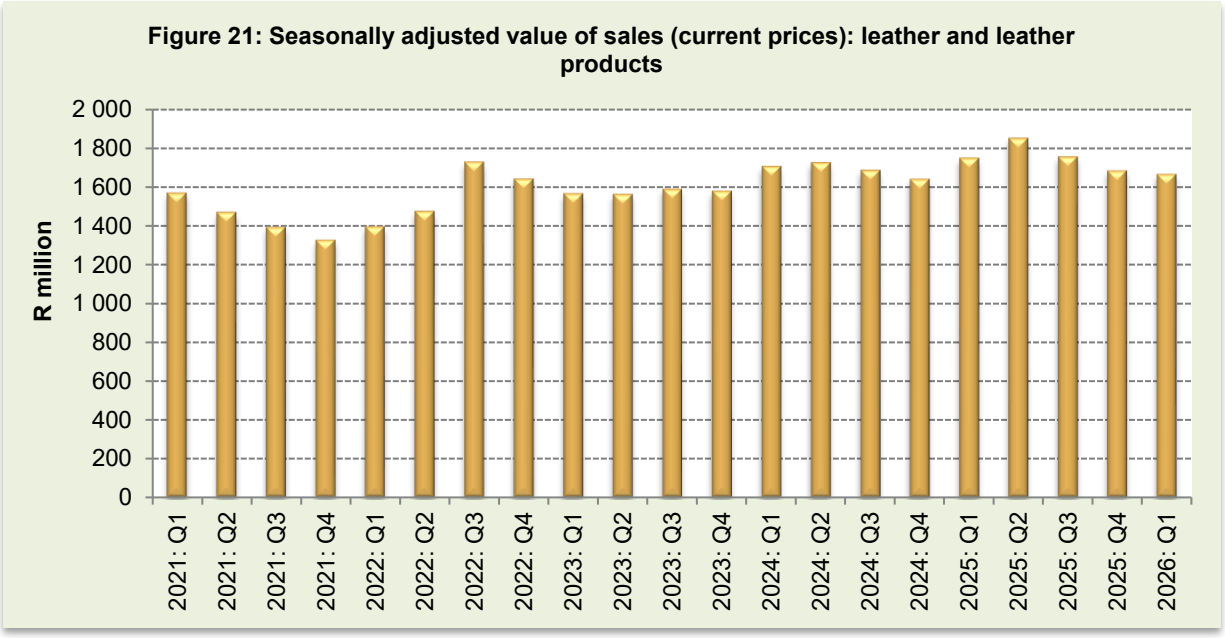
Table 11: Utilisation and reasons for underutilisation of production capacity by large enterprises: Leather and leather products (percentage)

Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour:			
				Skilled	Semi and unskilled		
2025: Q1	58,7	41,3	6,4	2,9	1,4	30,5	0,1
2025: Q4	63,2	36,8	1,8	0,5	1,4	33,1	0,0
2026: Q1	63,5	36,5	1,6	0,5	1,4	32,8	0,1

Source: Statistics SA (2026)

The utilisation of production capacity by large enterprises in the leather and leather products division increased year-on-year and quarter-to-quarter by 4,8 and 0,3 percentage points, respectively, in 2026: Q1. Insufficient demand and a shortage of raw materials remain the reasons for underutilisation during 2025: Q1 as shown in Table 11.

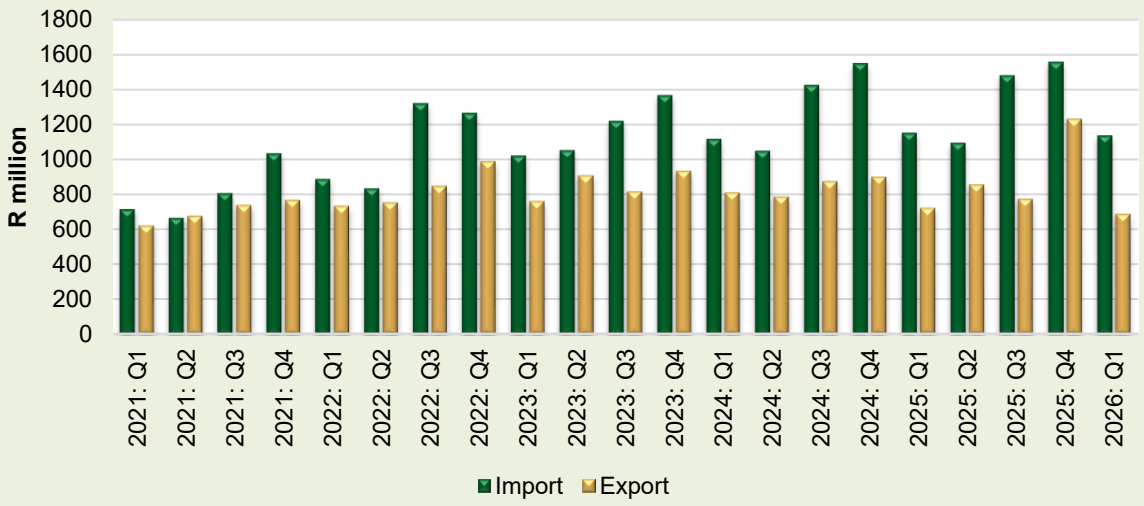
Figure 21: Seasonally adjusted value of sales (current prices): leather and leather products



Source: Quantec, 2026

The quarter-to-quarter seasonally adjusted value of sales for the leather and leather products division receded further by 1,1% in 2026: Q1 from a 4,2% contraction in 2025: Q4, however, the division contracted year-on-year by 4,8% (see Figure 21). Therefore, the value of sales for the leather and leather products division decreased from about R1 683,8 million in 2025: Q4 to R1 665,4 million in 2026: Q1.

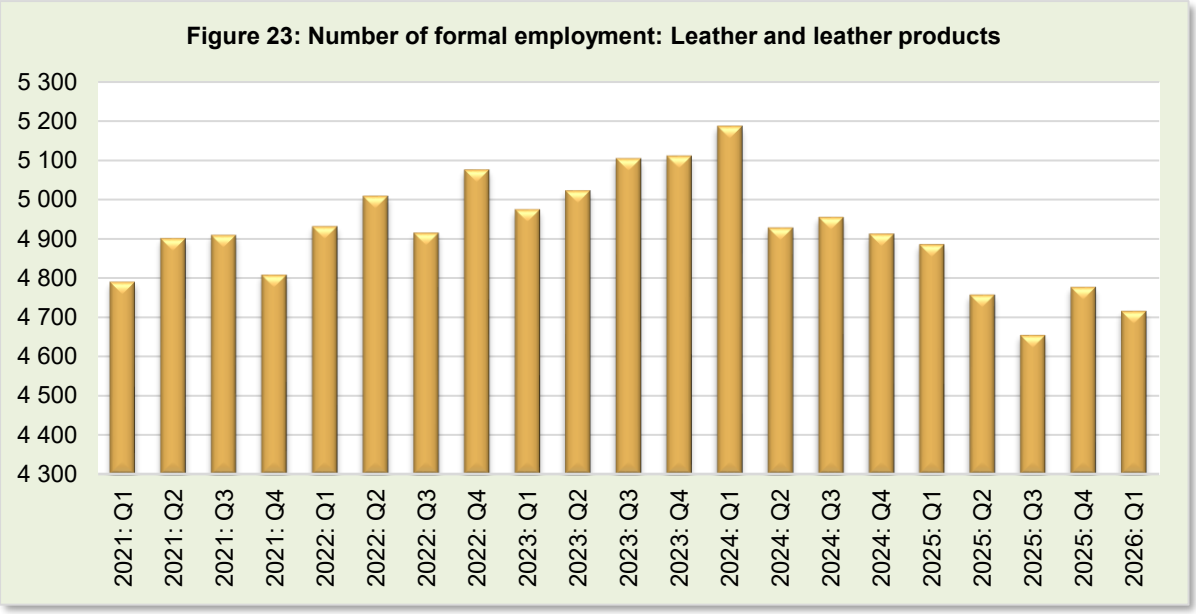
Figure 22: Quarterly trade balance of leather and leather products



Source: Quantec, 2026

Figure 22 above presents the quarterly trade balance of the leather and leather products division. In 2026: Q1, the quarter-to-quarter leather and leather products division exports and imports contracted by 44,1% and 27,0% from a 59,0% and 5,2% growth in 2025: Q4, respectively.

The year-on-year exports and imports contracted by 5,0% and 1,3%, respectively, in 2026: Q1. As a result, the trade deficit widened from R326,4 million in 2025: Q4 to R449,4 million in 2026: Q1.



Source: Statistics SA (2026)

The quarter-to-quarter formal employment in the leather and leather products division contracted by 1,3% in 2026: Q1 from a 2,6% growth in 2025: Q4, however, the division decelerated by 3,5% year-on-year. As a result, 61 jobs were lost in 2025: Q1 for the division as presented in Figure 23.

3.7 FOOTWEAR

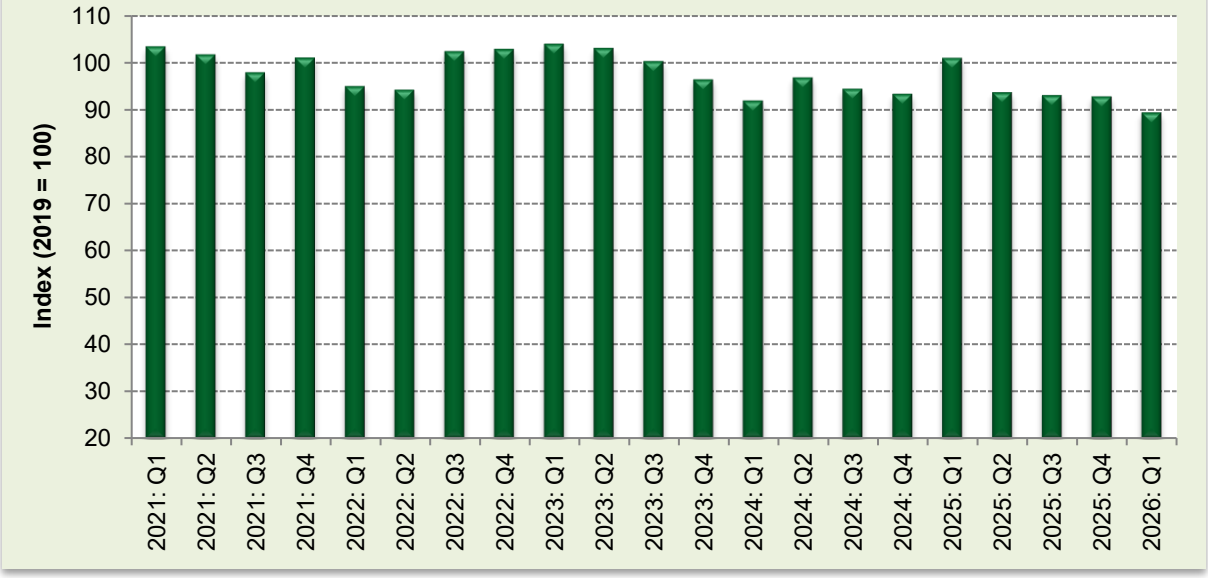
Table 12 presents the producer price index for the footwear division. In 2026: Q1, the quarter-to-quarter and year-on-year producer price index for the domestic output of the footwear division contracted by 1,0% and 0,1%, respectively.

Table 12: Producer price index for footwear (base 2023=100)

Indices			% Change between	
2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
Domestic output				
109,5	110,5	109,4	1,0	0,1

Source: Statistics SA (2026)

Figure 24: Seasonally adjusted physical volume of production: footwear



Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter seasonally adjusted physical volume of production for the footwear division decelerated by 3,7% from a 0,3% contraction in 2025: Q4. Similarly, the division decelerated by 11,5% year-on-year as shown in Figure 24.

Table 13: Utilisation and reasons for underutilisation of production capacity by large enterprises: Footwear (percentage)

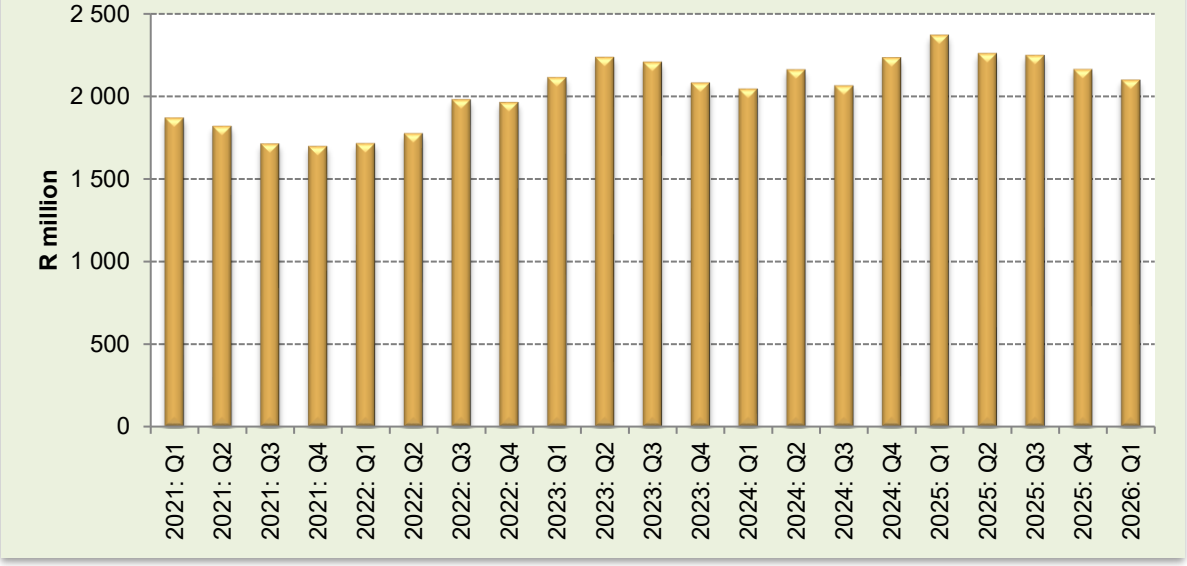
Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour:			
				Skilled	Semi and unskilled		
2025: Q1	78,2	21,8	4,4	1,0	0,0	13,7	2,8
2025: Q4	83,8	16,2	3,0	1,0	0,0	12,3	0,0
2026: Q1	73,7	26,3	3,5	1,0	0,0	18,5	3,3

Source: Statistics SA (2026)

In 2026: Q1, the utilisation of production capacity by large enterprises in the footwear division decreased year-on-year and quarter-to-quarter by 4,5 and 10,2 percentage points,

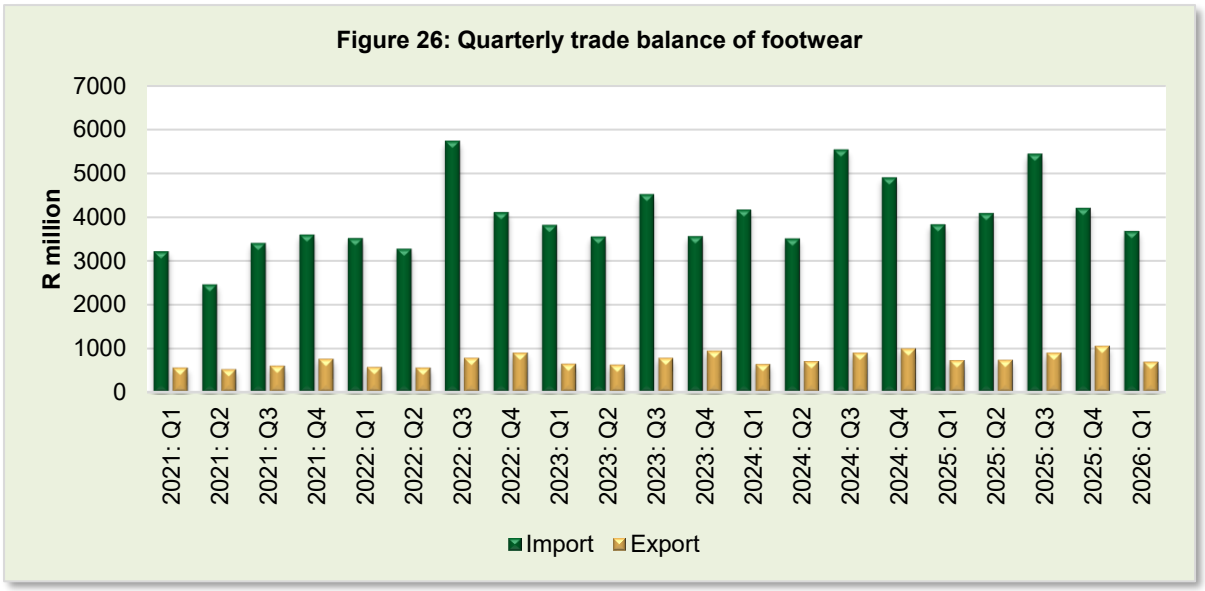
respectively. Insufficient demand remains the main reason behind low-capacity utilisation, followed by a shortage of raw materials as depicted in Figure 13.

Figure 25: Seasonally adjusted value of sales (current prices): footwear



Source: Quantec, 2026

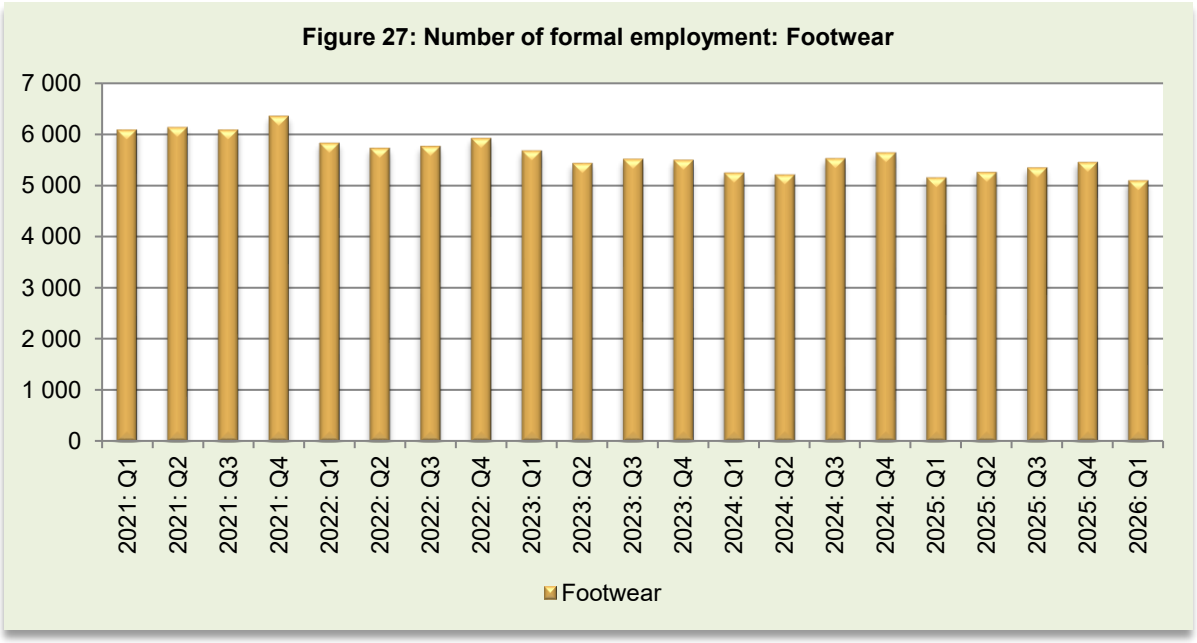
In 2026: Q1, the quarter-to-quarter seasonally adjusted value of sales for the footwear division receded further by 3,0% following a 3,8% contraction in 2025: Q4, however, the division decelerated year-on-year by 11,5%. Therefore, value of sales for the footwear division decreased from R2 161,0 million in 2025: Q4 to R2 096,3 million in 2026: Q1 as presented in Figure 25.



Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter exports for the footwear division contracted by 33,8% from a 16,5% growth in 2025: Q4. Imports, however, receded further by 12,5% following a 22,8% contraction in 2025: Q4.

The year-on-year footwear division exports contracted by 4,6%, however, imports receded further by 3,9% in 2026: Q1. As a result, the trade deficit narrowed from R3 144,2 million in 2025: Q4 to R2 986,4 million in 2026: Q1 as shown in Figure 26.



Source: Statistics SA (2026)

In 2026: Q1, the quarter-to-quarter formal employment in the footwear division contracted by 6,5% from a 2,0% growth in 2025: Q4. Similarly, the formal employment of the footwear division receded further year-on-year by about 1,1%. As a result, the footwear division shed approximately 357 jobs in 2025: Q1 (see Figure 27).

3.8 WOOD AND WOOD PRODUCTS

Figure 28: Seasonally adjusted physical volume of production: wood and wood products

Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter seasonally adjusted physical volume of production for sawmilling and planing of woods division contracted by 2,1% following a 6,6% growth in 2025: Q4. The products of wood division, on the other hand, moderated by 1,7% in 2026: Q1 from a 5,7% growth in 2025: Q4.

The year-on-year seasonally adjusted physical volume of production for sawmilling and planing of woods division rose by 5,2%, while products of wood moderated by 1,4%.

The division as a whole remained unchanged quarter-to-quarter as compared to a growth of 6,6% in 2025: Q4. However, the division as a whole grew by 3,1% year-on-year in 2026: Q1.

Table 14: Utilisation and reasons for underutilisation of production capacity by large enterprises: Wood and wood products (percentage)

Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labor			
				Skilled	Semi and unskilled		
2025: Q1	80,6	19,4	2,3	0,7	0,0	9,8	6,5
2025: Q4	81,0	19,0	2,2	0,7	0,0	9,2	6,9
2026: Q1	81,1	18,9	2,4	0,7	0,0	9,7	6,1

Source: Statistics SA (2026)

Table 14 shows the utilisation of production capacity by large enterprises in the wood and wood products division in 2026: Q1. The utilisation of production capacity increased year-on-year and quarter-to-quarter by 0,5 and 0,1 percentage points, respectively, in 2026: Q1. Insufficient demand remained a reason for underutilisation, followed by other reasons such as seasonal factors.

Figure 29: Seasonally adjusted value of sales (current prices): wood and wood products

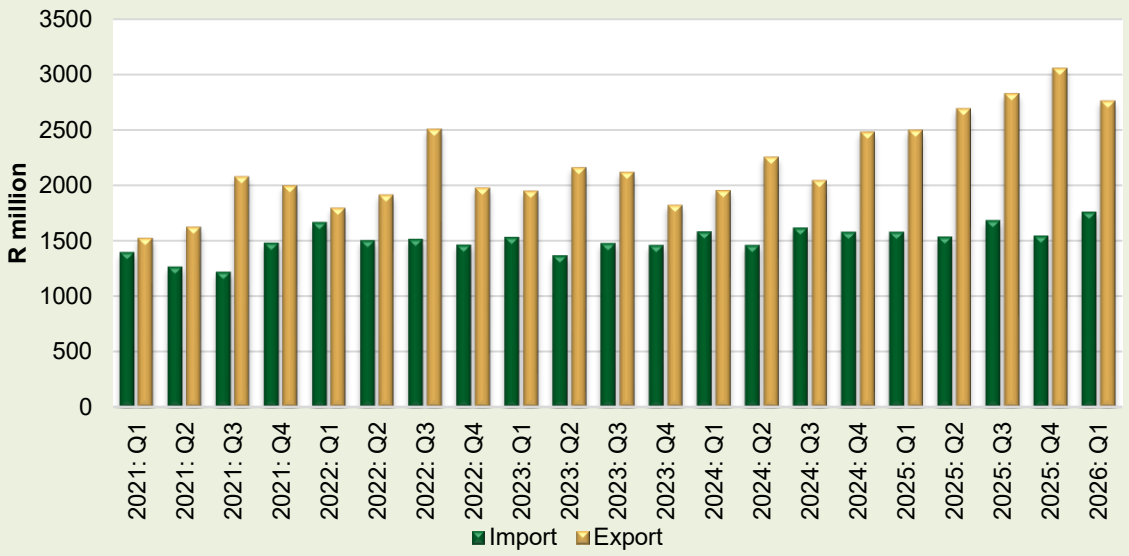
Source: Quantec, 2026

During 2026: Q1, the quarter-to-quarter seasonally adjusted value of sales for sawmilling and planing of wood division moderated by 1,9% from an 8,3% growth in 2025: Q4. Sales for the products of wood division, however, rose quarter-to-quarter by 3,1% in 2026: Q1 as compared to a 2,9% growth in 2025: Q4.

The year-on-year value of sales for sawmilling and planing of wood division rose by 16,4%, while products of wood receded further by 1,6% in 2026: Q1.

In 2026: Q1, the division as a whole moderated quarter-to-quarter by 2,7% from a 4,7% growth in 2025: Q4, however, it rebounded by 3,9% year-on-year. As a result, the value of sales in the wood division increased from R11 400,3 million in 2025: Q4 to R11 703,3 million in 2026: Q1.

Figure 30: Quarterly trade balance of wood and wood products



Source: Quantec, 2026

The quarter-to-quarter exports of wood and wood products contracted by 9,6% in 2026: Q1 following an 8,1% growth in 2025: Q4, however, imports of the wood and wood products division rebounded by 13,8% in 2026: Q1 from an 8,2% contraction in 2025: Q4.
In 2026: Q1, exports of wood and wood products moderated by 10,5% year-on-year, while imports rebounded by 11,4%. As a result, the trade surplus narrowed from R1 518,7 million in 2025: Q4 to approximately R1 012,4 million in 2026: Q1 (see Figure 30).

Source: Statistics SA (2026)

In 2026: Q1, the quarter-to-quarter employment in products of wood, cork, straw and plaiting materials receded further by 0,9% from a 1,3% contraction in 2025: Q4. The sawmilling and planing of wood division, however, rebounded by 2,1% quarter-to-quarter from a 1,6% contraction in 2025: Q4.

In terms of year-on-year, products of wood, cork, straw and plaiting materials decelerated by 2,7%, while sawmilling and planing of wood division rose by 0,5%.

The division as a whole rebounded quarter-to-quarter by 0,1%, however, it decelerated by 1,6% year-on-year. As a result, the division as a whole created 42 jobs in 2026: Q1.

3.9 PAPER AND PAPER PRODUCTS

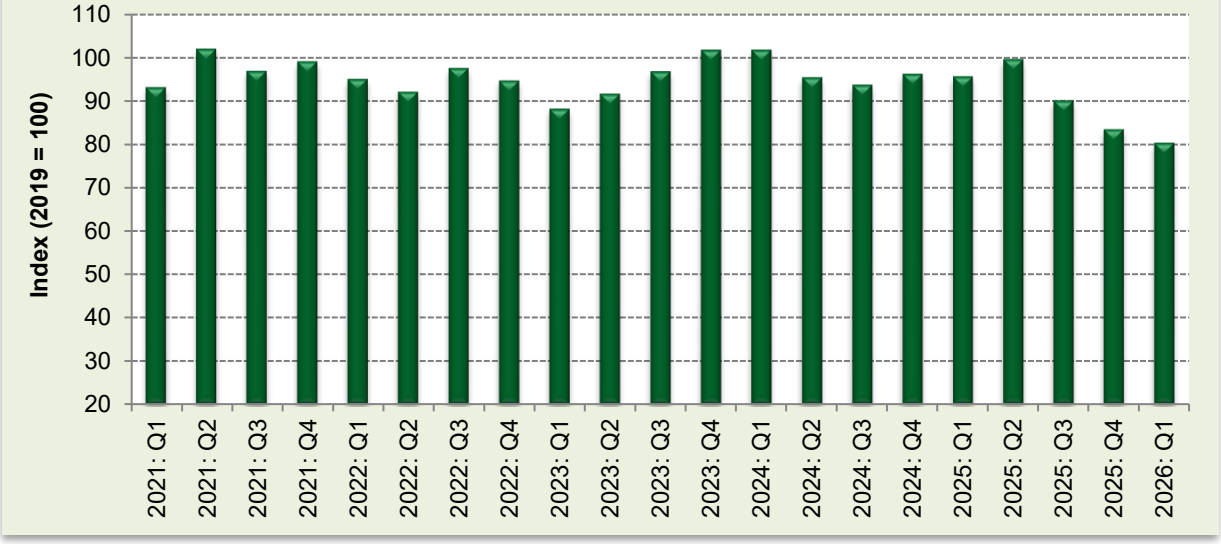
In 2025: Q1, the quarter-to-quarter producer price for paper and paper products contracted by 0,1%. However, the index rose by 4,7% year-on-year as illustrated in Table 15.

Table 15: Producer price index for paper and paper products (base 2023=100)

	Indices			% Change between	
	2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
Domestic output					
Paper and paper products	98,3	103,1	103,0	4,7	-0,1

Source: Statistics SA (2026)

Figure 32: Seasonally adjusted physical volume of production: paper and paper products



Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter seasonally adjusted physical volume of production for the paper and paper products division receded further by 3,7% as compared to a 7,4% contraction in 2025: Q4. However, the division decelerated by 16,0% year-on-year in 2026: Q1 (see Figure 32).

Table 16: Utilisation and reasons for underutilisation of production capacity by large enterprises: Paper and paper products (percentage)

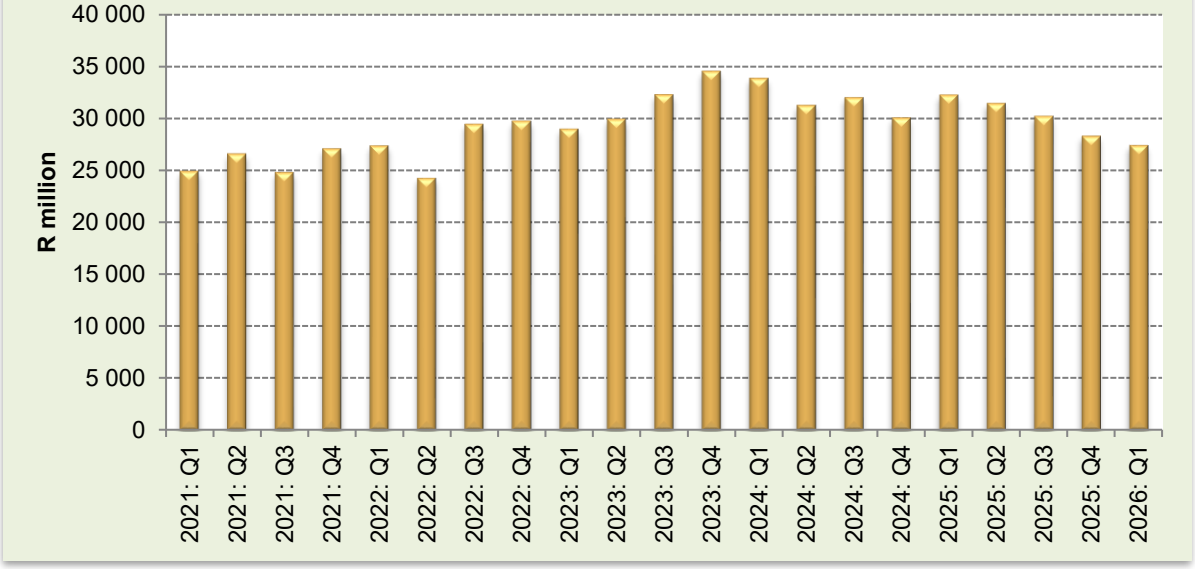
Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour:			
				Skilled	Semi and unskilled		
2025: Q1	80,6	19,4	2,3	0,7	0,0	9,8	6,5
2025: Q4	81,0	19,0	2,2	0,7	0,0	9,2	6,9
2026: Q1	81,1	18,9	2,4	0,7	0,0	9,7	6,1

Source: Statistics SA (2026)

Table 16 shows utilisation of production capacity by large enterprises in the paper and paper products division. The utilisation of production capacity increased year-on-year by

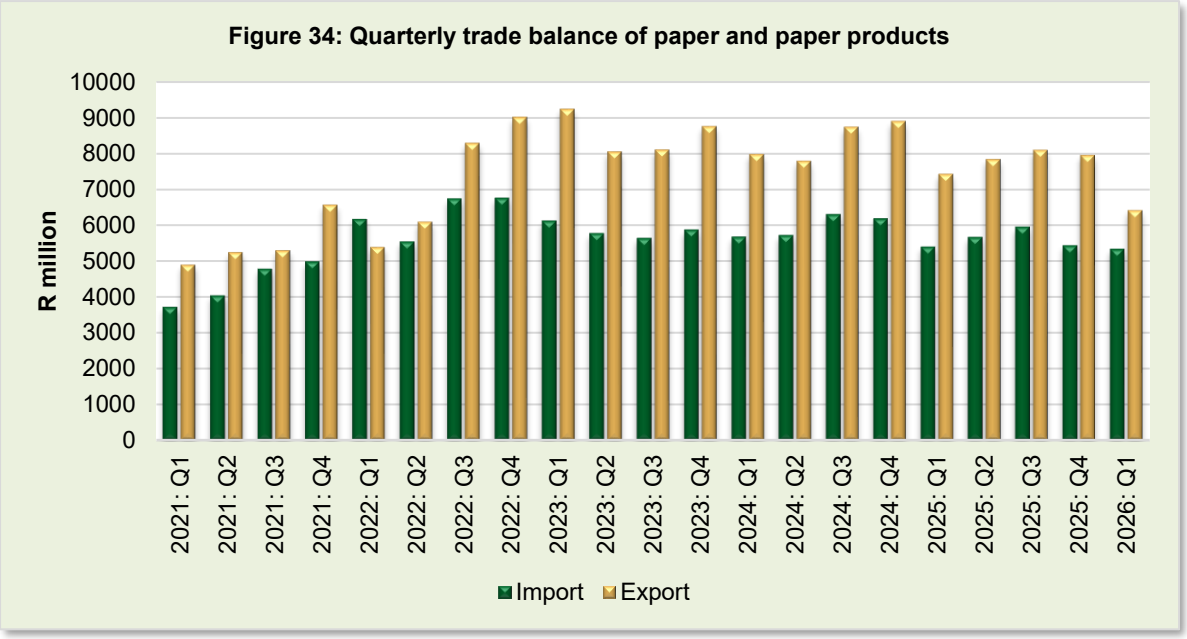
approximately 0,5 percentage points. Similarly, it increased quarter-to-quarter by 0,1 percentage points in 2026: Q1. Insufficient demand remained the main reason for underutilisation during the period under review, followed by other reasons such as seasonal factors.

Figure 33: Seasonally adjusted value of sales (current prices): paper and paper products



Source: Quantec, 2026

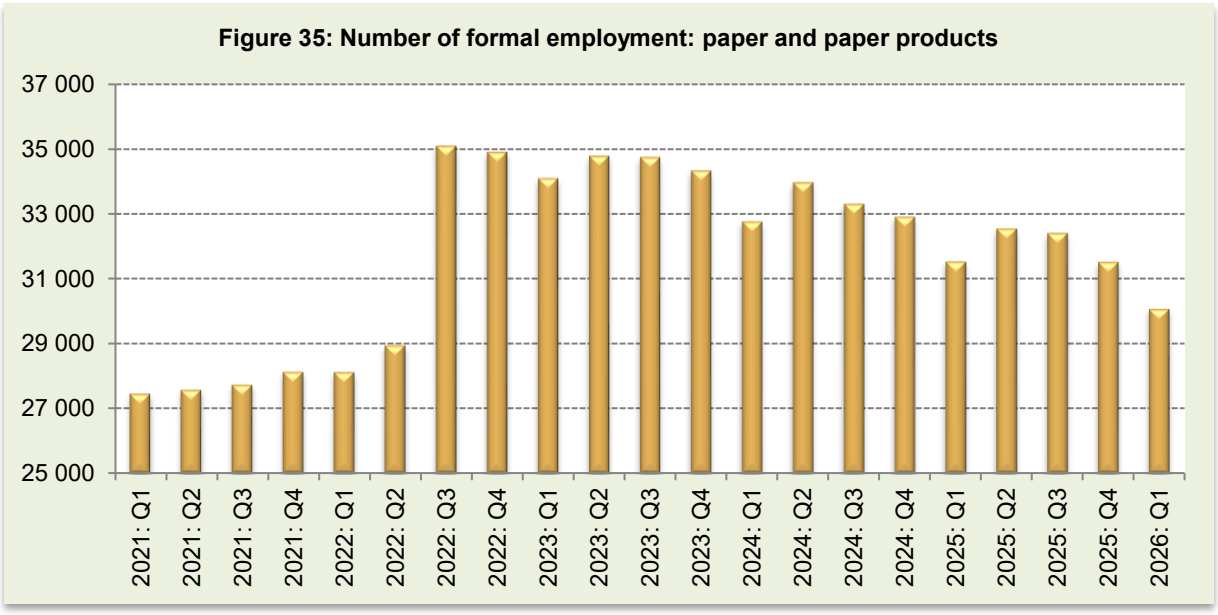
In 2026: Q1, the quarter-to-quarter seasonally adjusted value of sales for paper and paper products division receded further by 3,1% from a 6,4% contraction in 2025: Q4. However, the division decelerated year-on-year by 15,1% (see Figure 33). As a result, seasonally adjusted value of sales for the paper and paper products division decreased from R28 258,3 million in 2025: Q4 to R27 368,7 million in 2026: Q1.



Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter exports of paper and paper products division decelerated by 19,4% from a 1,8% contraction in 2025: Q4, however, imports of the paper and paper products division receded further by 1,7% following an 8,7% contraction in 2025: Q4.

The year-on-year exports and imports decelerated by 13,7%, similarly, imports receded further by 1,1% in 2026: Q1. As a result, the trade surplus narrowed from R2 8523,1 million in 2025: Q4 to R1 073,9 million in 2026: Q1 as depicted in Figure 34.



Source: Statistics SA (2026)

The quarter-to-quarter formal employment in the paper and paper products division decelerated by 4,6% in 2026: Q1 as compared to a 2,7% contraction in 2025: Q4. Similarly, the division decelerated by 4,7% year-on-year. As a result, the paper and paper products division shed about 1 457 jobs in 2026: Q1 (see Figure 35).

3.9 RUBBER PRODUCTS

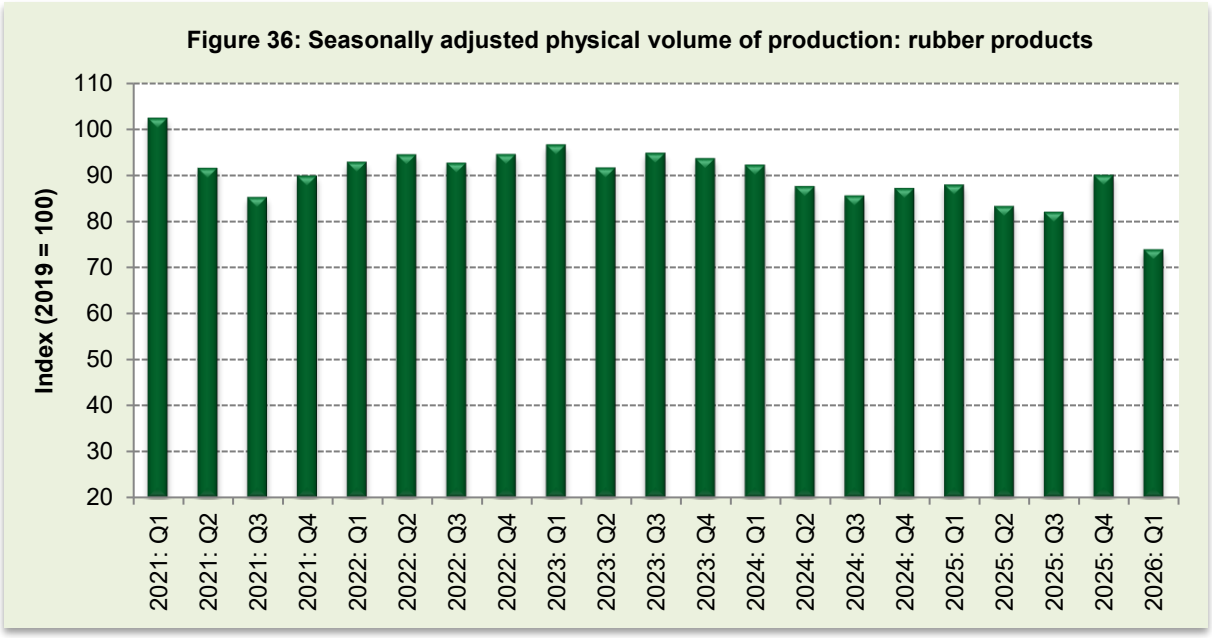
In 2026: Q1, the quarter-to-quarter producer price index for domestic output of the rubber and plastic products division remained unchanged as compared to a 3,7% contraction in 2025: Q4, however, it receded further by 0,4% year-on-year (see Table 17).

Table 17: Producer price index for rubber products (base 2023=100)

	Indices			% Change between	
	2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
Domestic output					
Rubber products	99,9	99,5	99,5	0,4	0,0

Source: Statistics SA (2026)

Figure 36: Seasonally adjusted physical volume of production: rubber products



Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter seasonally adjusted physical volume of production for the rubber products division contracted by 18,0%, following a 9,8% growth in 2025: Q4, similarly, the division contracted by 16,0% year-on-year (see Figure 36).

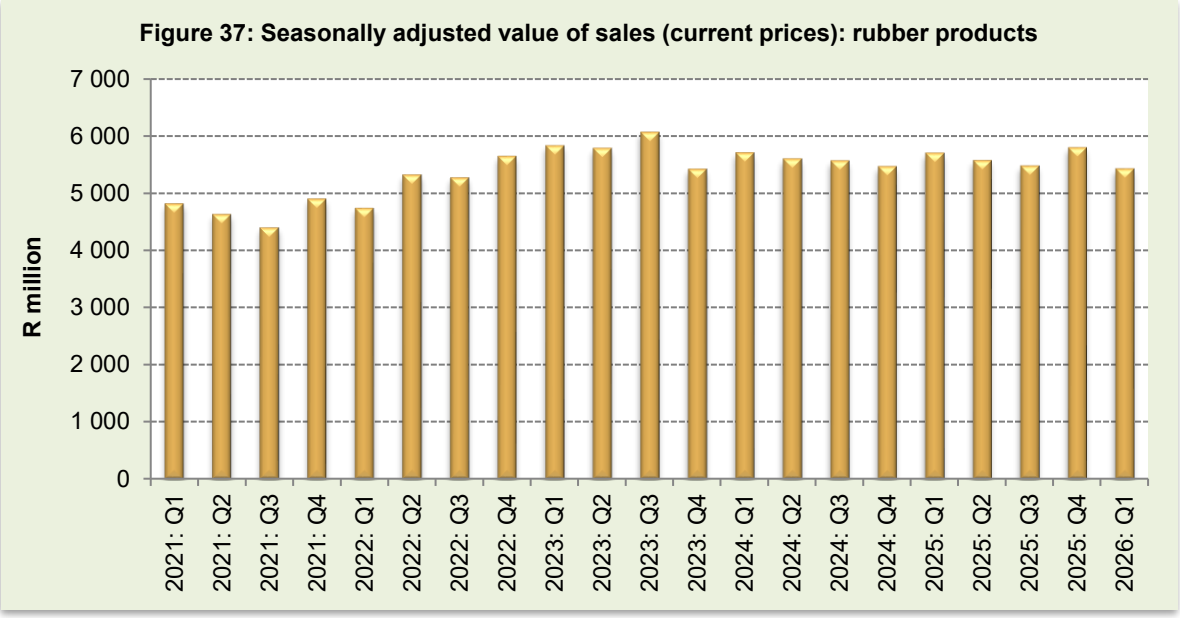
Table 18: Utilisation and reasons for underutilisation of production capacity by large enterprises: Rubber products (percentage)

Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour			
				Skilled	Semi and unskilled		
2025: Q1	76,5	23,5	0,1	0,2	0,0	12,2	11,0
2025: Q4	73,5	26,5	0,2	0,1	0,0	15,1	11,2
2026: Q1	68,9	31,1	0,1	0,1	0,0	19,5	11,5

Source: Statistics SA (2026)

As shown in Table 18, the utilisation of production capacity by large enterprises in the rubber products division decreased year-on-year and quarter-to-quarter by 7,6 and 4,6 percentage points in 2026: Q1. Insufficient demand remained the main reason for underutilisation during the period under review, followed by other reasons such as lower productivity.

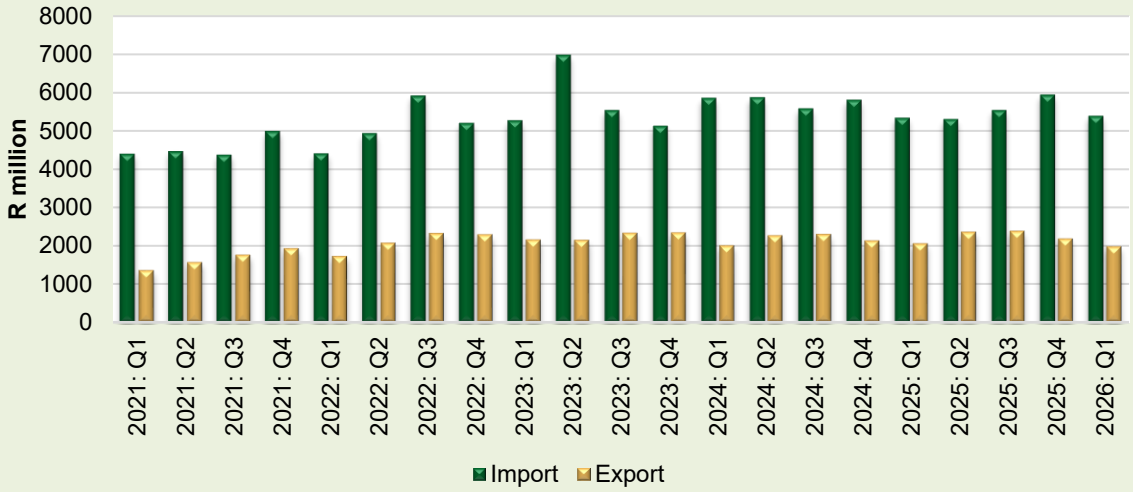
Figure 37: Seasonally adjusted value of sales (current prices): rubber products



Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter seasonally adjusted value of sales in the rubber products division contracted by 6,3% from a 5,8% growth in 2025: Q4, similarly, the division contracted by 4,8% year-on-year. Therefore, sales in the rubber products division decreased from R5 797,3 million in 2025: Q4 to R5 432,3 million in 2026: Q1 (see Figure 37).

Figure: 38 Quarterly trade balance of rubber products

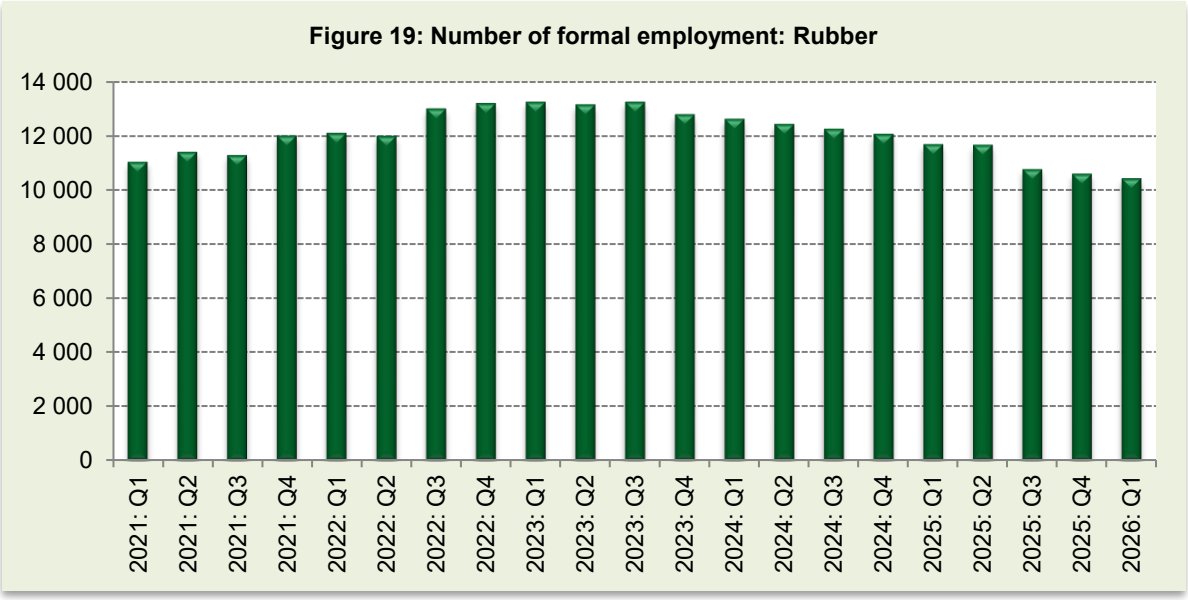


Source: Quantec, 2026

The quarter-to-quarter exports of the rubber products division decelerated by 9,0% in 2026: Q1 from a 8,6% contraction registered in 2025: Q4, however, imports of the rubber products division contracted by 9,2% following a 7,2% growth in 2025: Q4.

The year-on-year exports contracted by 3,5%, while imports moderated by 1,0% in 2026: Q1, respectively.

As a result, the trade deficit narrowed from R3 753,2 million in 2025: Q4 to R3 402,2 million in 2026: Q1.



Source: Statistics SA (2026)

In 2026: Q1, the quarter-to-quarter formal employment in the rubber products division contracted the same as in 2025: Q4 by 1,6%, however, the division receded further by 10,7% year-on-year (see Figure 39). As a result, about 166 jobs were shed in the rubber products division in 2026: Q1.

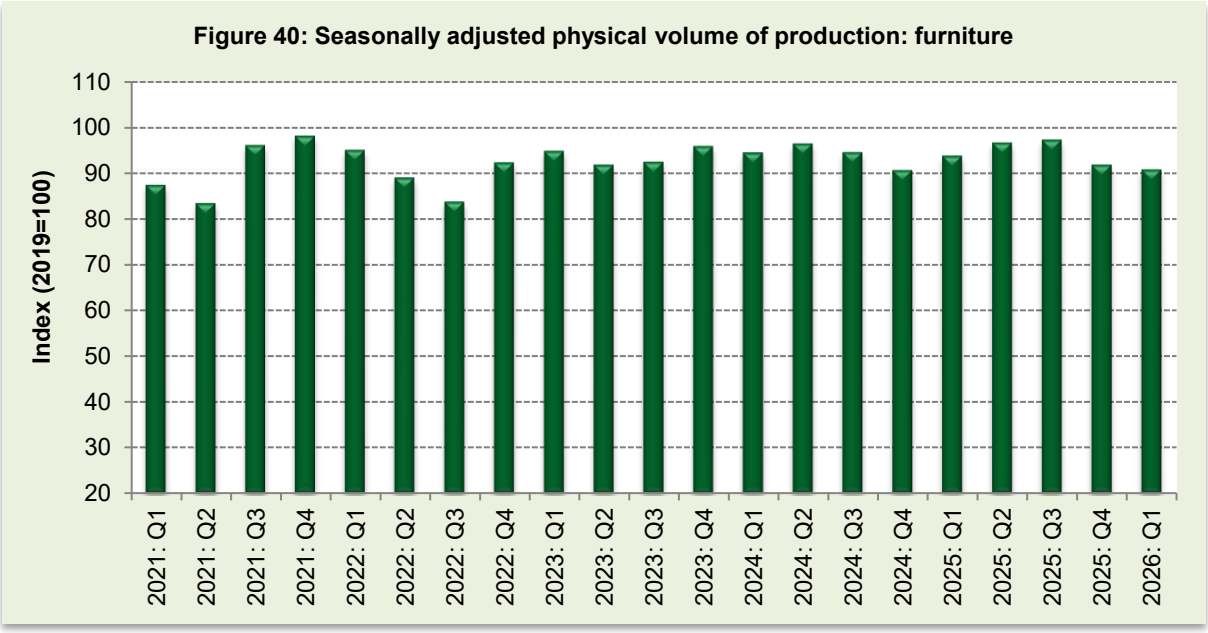
3.10 FURNITURE

The quarter-to-quarter and year-on-year producer price index for domestic output of furniture and other manufacturing expanded by 4,2% and 12,8%, respectively, in 2026: Q1 (see Table 19).

Table 19: Producer price index for furniture and other manufacturing (base 2023=100)

Indices			% Change between	
2025: Q1	2025: Q4	2026: Q1	2025: Q1 and 2026: Q1	2025: Q4 and 2026: Q1
Domestic output				
108,2	117,1	122,0	12,8	4,2

Source: Statistics SA (2026)



Source: Quantec, 2026

In 2026: Q1, the quarter-to-quarter seasonally adjusted physical volume of production for the furniture division receded further by 1,2% from a 5,6% contraction in the preceding quarter, however, it contracted by 3,2% year-on-year as shown in Figure 40.

Table 20: Utilisation and reasons for underutilisation of production capacity by large enterprises: Furniture (percentage)

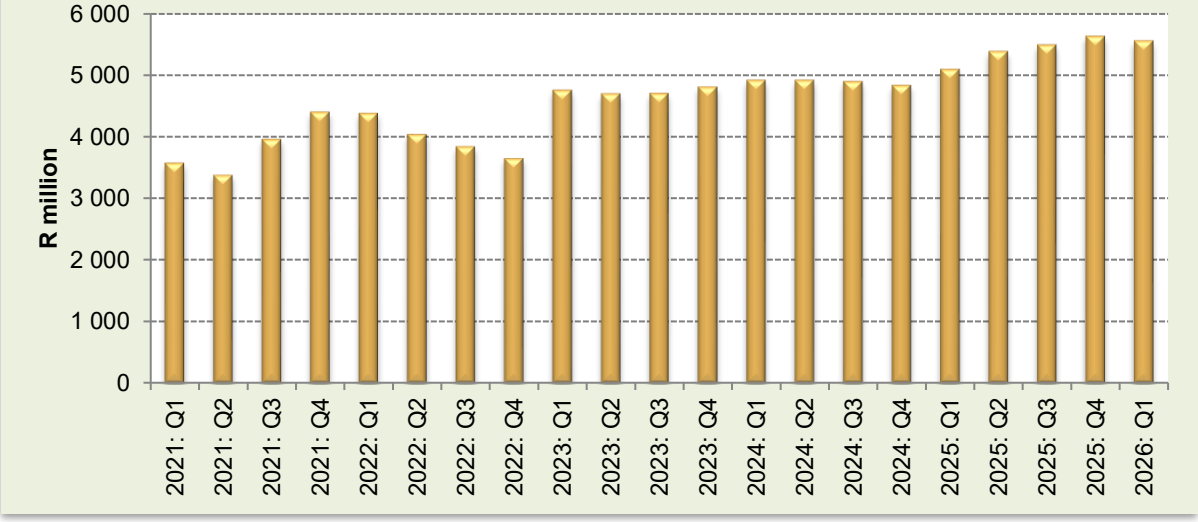
Period	Utilisation	Reasons for underutilisation					
		Total underutilisation	Shortage of:			Insufficient demand	Other
			Raw materials	Labour:			
				Skilled	Semi and unskilled		
2025: Q1	72,5	27,5	3,0	0,0	0,0	24,5	0,0
2025: Q4	76,5	23,5	2,2	0,0	0,0	21,3	0,0
2026: Q1	74,0	26,0	3,0	0,0	0,0	22,9	0,0

Source: Statistics SA (2026)

The utilisation of production capacity by large enterprises in the furniture division increased year-on-year by 1,5 percentage points, however, it decreased quarter-to-quarter by 2,5

percentage points. Insufficient demand remained the main reason for underutilisation of production capacity, followed by a shortage of raw materials (see Table 20).

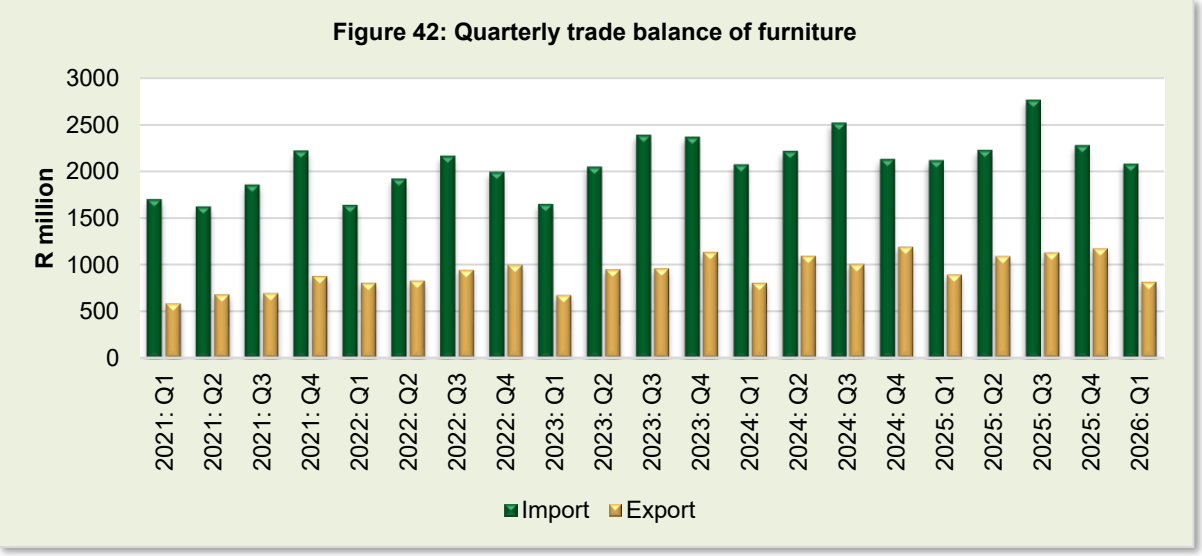
Figure 41: Seasonally adjusted value of sales (current prices): furniture



Source: Quantec, 2026

The quarter-to-quarter seasonally adjusted value of sales for the furniture division contracted by 1,3% in 2026: Q1 following a 2,5% growth in 2024: Q4. However, the division moderated by 9,1% year-on-year. As a result, the value of sales in the division decreased from R5 635,4 million in 2025: Q4 to R5 564,3 million in 2026: Q1 as illustrated in Figure 41.

Figure 42: Quarterly trade balance of furniture

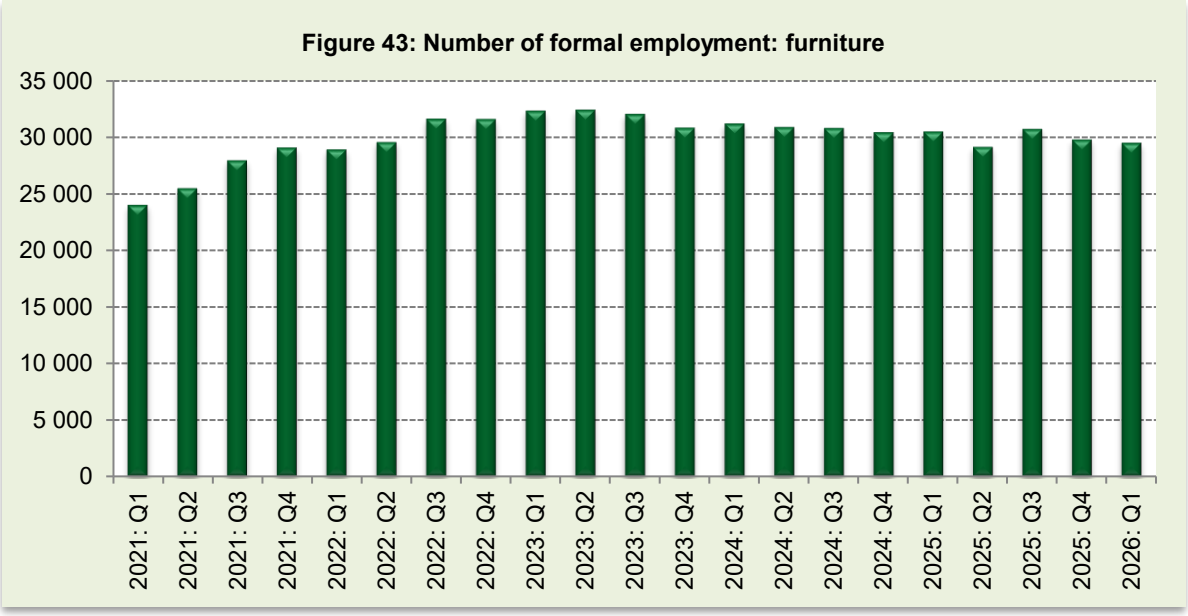


Source: Quantec, 2026

The quarter-to-quarter exports of the furniture division contracted by 30,3% in 2026: Q1 as compared to a 3,8% growth in 2025: Q4. However, imports receded further by 8,8% in 2026: Q1 from a 17,6% contraction in 2025: Q4.

The year-on-year exports decelerated by 8,8%, however, imports contracted by 1,8% in 2026: Q1, respectively (see Figure 42). As a result, the trade deficit widened from R1 106,6 million in 2025: Q4 to about R1 261,8 million in 2026: Q1.

Figure 43: Number of formal employment: furniture



Source: Statistics SA (2026)

In 2026: Q1, quarter-to-quarter formal employment in the furniture division receded further by 0,9% following a 3,1% contraction in 2025: Q4, however, the division's employment decelerated by 3,2% year-on-year. As a result, approximately 274 jobs were shed in the period under review as shown in Figure 43.

4. CONCLUSION

In 2026: Q1, the economic activity in South Africa rose by 0,5%; the real output of the primary sector rebounded by 1,9%, and the output of the secondary sector, however, decelerated by 0,8%, while that of the tertiary sector moderated by 0,6%.

The agro-processing industry's seasonally adjusted volume of production rebounded by 2,4% from a 0,2% growth in 2025: Q4, however, the seasonally adjusted value of sales for the agro-processing sector receded further by 0,5% from a 1,7% contraction in 2025: Q4.

The trade deficit of the agro-processing industry widened from R13 443,9 million in 2025: Q4 to R14 182,3 million in 2026: Q1. The agro-processing industry rebounded by 1,5% quarter-to-quarter, as a result, 7 087 jobs were created in 2026: Q1.

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NOTES