

In addition to the quality information, production figures (obtained from the Crop Estimates Committee (CEC)) relating to hectares planted, tons produced and yields obtained on a national as well as provincial basis, over an eleven season period, are provided in this report. SAGIS (South African Grain Information Service) supply and demand information is provided in table and graph format. Import and export figures over several seasons as well as information on the manufacture, import and export of oil seeds products, are also included.

The report of the Evaluation of sunflower cultivars 2017/2018 season conducted by the ARC-Grain Crops in collaboration with Agricol, Pannar, AGT, Pioneer and Syngenta is included in totality and as received, in this report. The national grading regulations as published in Government Notice NO. 45 of 22 January 2016 are also provided.

## Production

World sunflower seed production for the 2017/2018 season stands at 49.6 million tons with the Ukraine and Russia contributing 49% to this total. The forecasted figure for the 2018/2019 season is 52.3 million tons. Please see Table 1 for the world sunflower seed supply and demand figures.

Season	2013/14	2014/15	2015/16	2016/17	2017/18 (Revised)	2018/19 (Forecast)
<b>Area Harvested (1 000 Ha)</b>	<b>25 730</b>	<b>24 708</b>	<b>25 242</b>	<b>26 964</b>	<b>27 291</b>	<b>27 802</b>
<b>Yield (MT/Ha)</b>	<b>1.68</b>	<b>1.67</b>	<b>1.70</b>	<b>1.86</b>	<b>1.82</b>	<b>1.88</b>
<b>Production (1 000 MT)</b>						
Argentina	2 250	3 000	2 830	3 300	3 400	3 800
European Union	9 105	9 006	7 769	8 641	9 985	9 546
China	2 423	2 380	2 698	2 750	2 800	2 860
Russia	10 200	9 000	9 700	11 600	11 000	12 000
Ukraine	10 941	10 250	12 100	15 100	13 500	15 500
United States	917	1 005	1 326	1 203	978	961
South Africa	736	736	755	874	859	740
Turkey	1 450	1 350	1 350	1 470	1 700	1 540
Other	5 315	4 607	4 386	5 130	5 343	5 341
<b>TOTAL</b>	<b>43 337</b>	<b>41 334</b>	<b>42 914</b>	<b>50 068</b>	<b>49 565</b>	<b>52 288</b>
<b>Import (1 000 MT)</b>						
Turkey	581	523	436	611	721	780
European Union	329	275	577	632	520	600
Other	1 050	1 078	1 100	1 396	1 305	1 346
<b>TOTAL</b>	<b>1 960</b>	<b>1 876</b>	<b>2 113</b>	<b>2 639</b>	<b>2 546</b>	<b>2 726</b>
<b>Export (1 000 MT)</b>						
Argentina	80	63	302	74	58	100
United States	132	126	107	99	89	70
Russia	131	61	105	362	98	200
Ukraine	71	123	171	261	50	200
Other	1 536	1 462	1 467	1 804	2 253	2 155
<b>TOTAL</b>	<b>1 950</b>	<b>1 835</b>	<b>2 152</b>	<b>2 600</b>	<b>2 548</b>	<b>2 725</b>
<b>Oilseed crushed</b>	<b>38 360</b>	<b>36 581</b>	<b>38 177</b>	<b>44 845</b>	<b>44 974</b>	<b>47 114</b>
<i>National Sunflower Association website <a href="http://www.sunflowernsa.com">www.sunflowernsa.com</a>, Table updated February 8, 2019; Source: Oil World &amp; USDA.</i>						

Sunflower seed production is very suitable for South African climatic conditions as sunflower plants are drought tolerant. The deep root system of a sunflower enables the plant to perform better than other crops during dry seasons. Planting sunflowers is also advantageous when rainfall occurs late in the season, due to the late planting window relative to that of maize.

The area utilized for sunflower production decreased by 5.4% to 601 500 ha, compared to the 635 700 ha of the previous season. This season's area planted are in line with the 5-year average of 606 780 hectares. The national yield average increased by 4.4% to 1.43 t/ha, the highest national average to date.

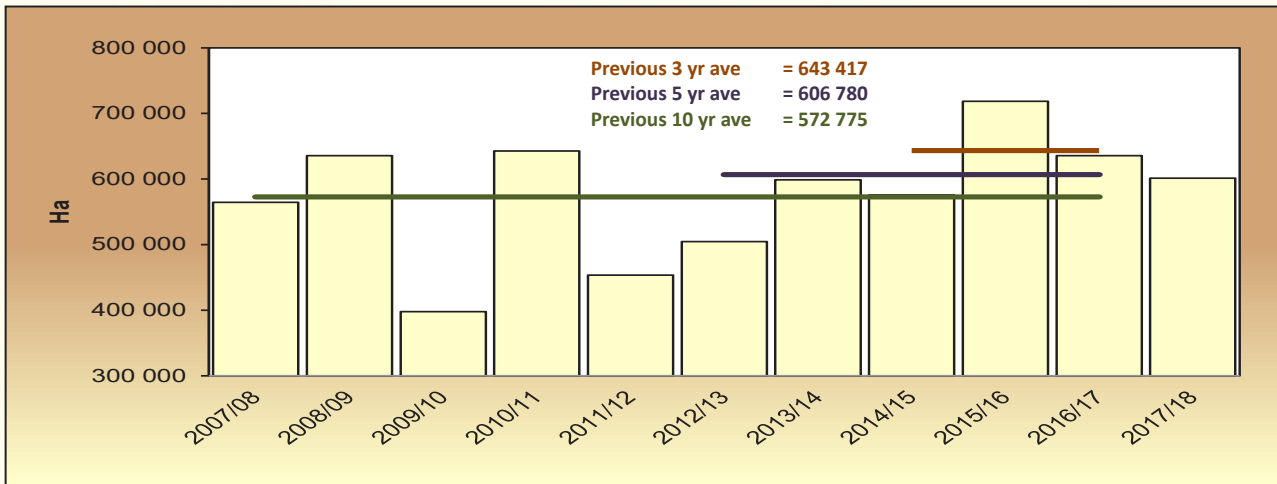
According to *The Bureau for Food and Agricultural Policy (BFAP) Baseline, Agricultural Outlook 2018 – 2027*, sunflower area is expected to decline marginally over the outlook period, additional demand will however be met comfortably by increasing yields. Yields are projected to increase by an average of 2.2% per year, reaching 1.65 t/ha by 2027. This projected growth in yield is based on the assumption of stable rainfall and cultivars improving continuously. Average yields over the past five years have not reflected the potential of current varieties due to adverse weather conditions (extreme droughts and temperatures) in four of the five seasons. The adoption of the latest release of high-yielding cultivars with Clearfield® technology that significantly reduces weed pressure and increases yield, is rapidly gaining ground. Average yields are therefore expected to improve going forward.

Please see Table 2 for an overview of sunflower production under dry land conditions versus irrigation in the 2017/2018 season, compared to the 2016/2017 season. Graphs 2 to 4 provide national figures with regards to hectares planted, tons produced and yields obtained over the last 11 seasons and Graphs 5 to 10 similar figures for the major sunflower producing provinces, namely the Free State and North West as well as Limpopo.

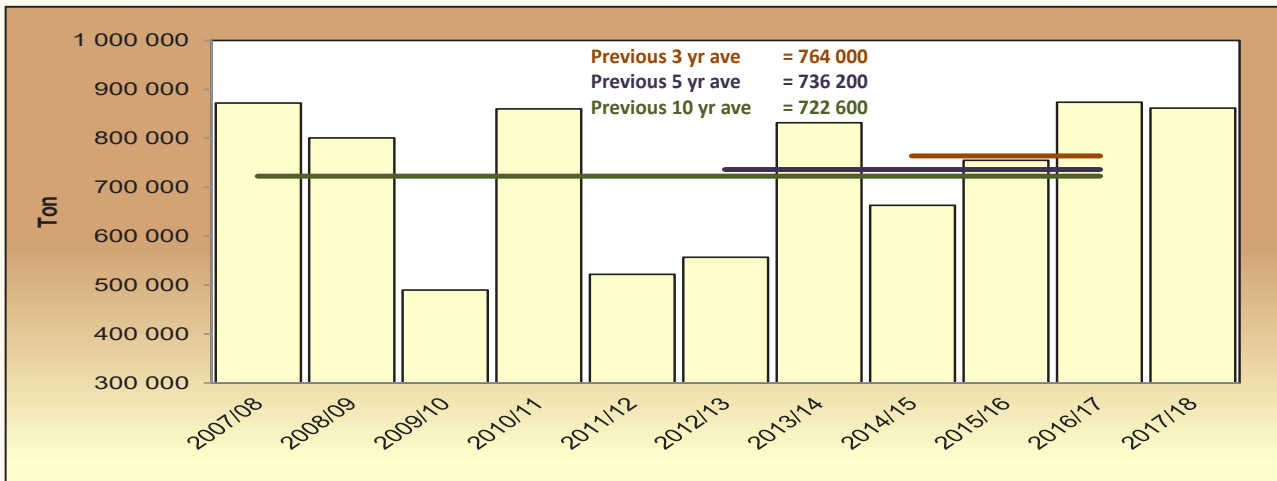
Province	Type of production	2017/2018			2016/2017		
		Hectares planted, ha	Production, tons	Yield, t/ha	Hectares planted, ha	Production, tons	Yield, t/ha
Western Cape	Dryland	100	100	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	100	100	-	-	-	-
Northern Cape	Dryland	-	-	-	-	-	-
	Irrigation	1 600	1 920	1.20	250	400	1.60
	Total	1 600	1 920	1.20	250	400	1.60
Free State	Dryland	312 200	486 000	1.56	328 000	475 000	1.45
	Irrigation	1 800	4 000	2.22	2 000	3 000	1.50
	Total	314 000	490 000	1.56	330 000	478 000	1.45
Eastern Cape	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
KwaZulu-Natal	Dryland	-	-	-	300	300	1.00
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	300	300	1.00
Mpumalanga	Dryland	2 300	2 180	0.95	2 200	2 300	1.05
	Irrigation	-	-	-	-	-	-
	Total	2 300	2 180	0.95	2 200	2 300	1.05
Limpopo	Dryland	44 500	34 750	0.78	87 500	82 500	0.94
	Irrigation	500	1 250	2.50	2 500	3 000	1.20
	Total	45 000	36 000	0.80	90 000	85 500	0.95
Gauteng	Dryland	5 050	4 500	0.89	2 600	2 500	0.96
	Irrigation	450	1 100	2.44	400	500	1.25
	Total	5 500	5 600	1.02	3 000	3 000	1.00
North West	Dryland	231 900	323 950	1.40	207 500	300 000	1.45
	Irrigation	1 100	2 250	2.05	2 500	4 500	1.80
	Total	233 000	326 200	1.40	210 000	304 500	1.45
RSA	Dryland	596 050	851 480	1.43	628 100	862 600	1.37
	Irrigation	5 450	10 520	1.93	7 650	11 400	1.49
	Total	601 500	862 000	1.43	635 750	874 000	1.37

Figures provided by the CEC.

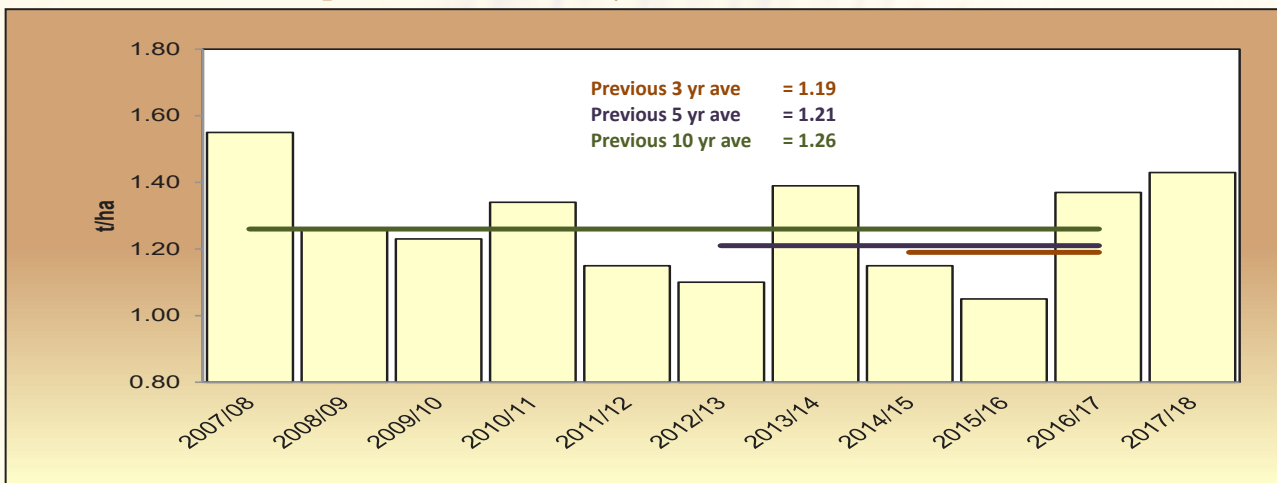
**Graph 2: Total RSA area utilised for sunflower production from 2007/08 to 2017/18**



**Graph 3: Sunflower production in RSA from 2007/08 to 2017/18**

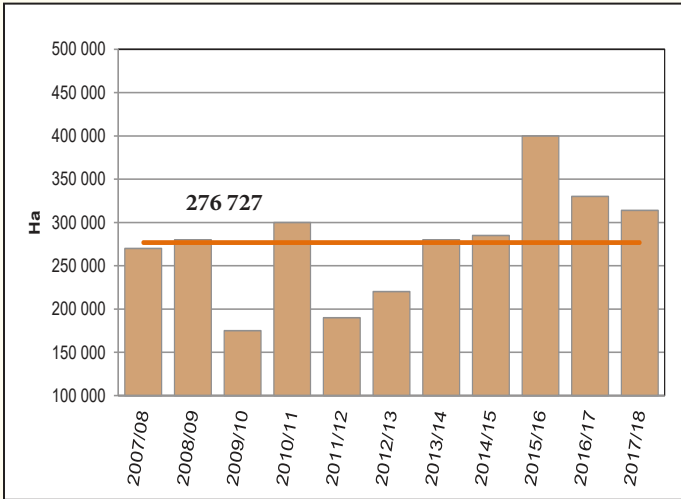


**Graph 4: RSA Sunflower yield from 2007/08 to 2017/18**

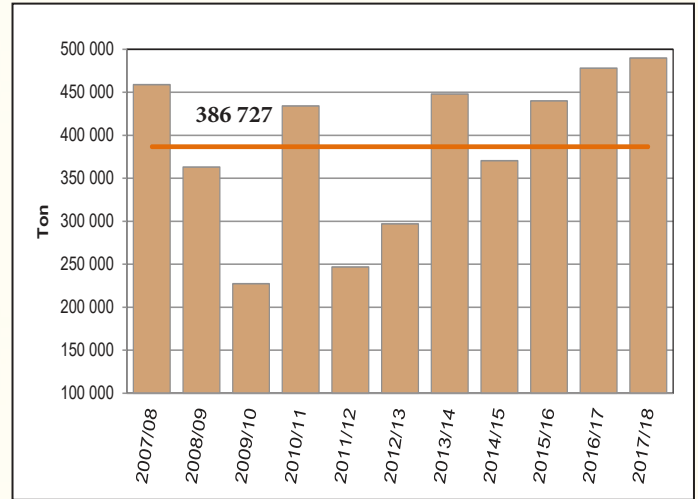


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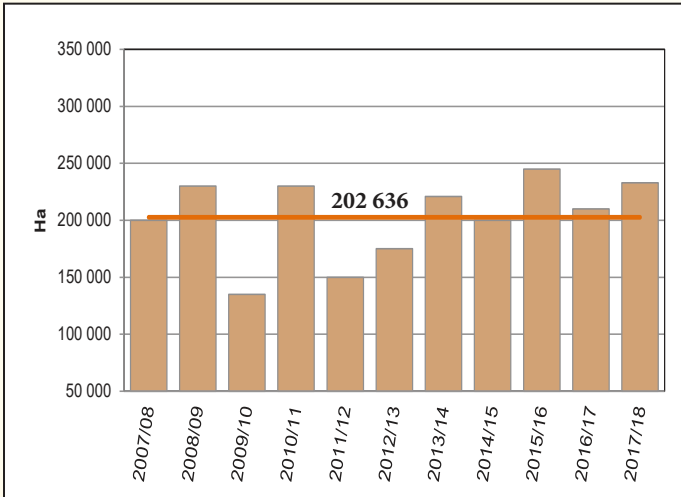
**Graph 5: Area utilised for sunflower production in the Free State since 2007/08**



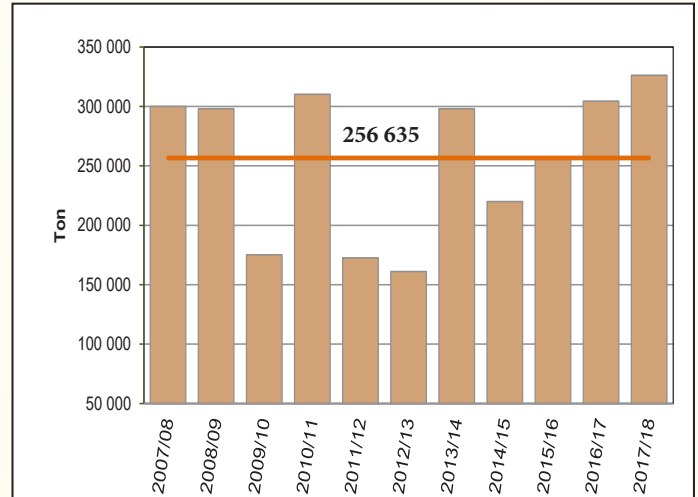
**Graph 6: Sunflower production in the Free State since 2007/08**



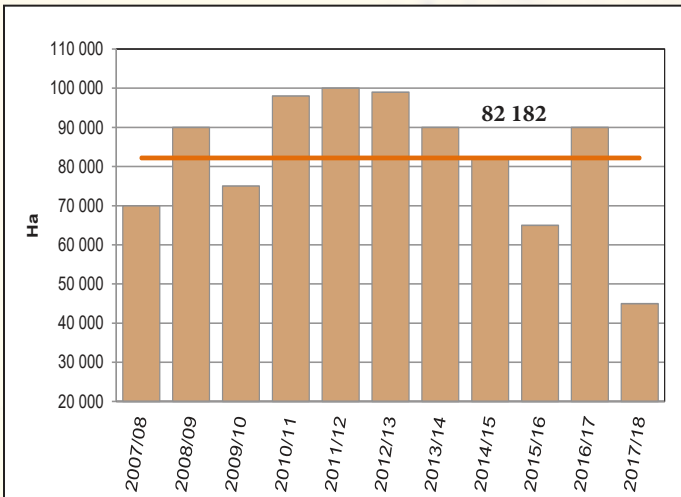
**Graph 7: Area utilised for sunflower production in North West since 2007/08**



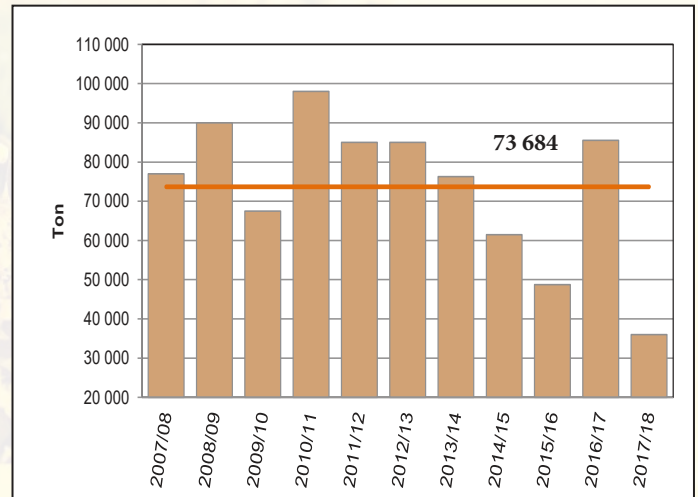
**Graph 8: Sunflower production in North West since 2007/08**



**Graph 9: Area utilised for sunflower production in Limpopo since 2007/08**



**Graph 10: Sunflower production in Limpopo since 2007/08**



Figures provided by the CEC.

— Eleven season average