

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 for the 2022/23 season, conducted by the ARC-Grain Crops Institute in collaboration with Agricol, Pannar, Pioneer, Syngenta and Limagrain Zaad South Africa, is included in totality and as received. 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 2022/23 season stands at 55.2 million metric tons with the Ukraine and Russia contributing 53% to this total. An area of 29.8 million hectares were harvested resulting in a yield of 1.85 metric tons/hectare. The forecasted figure for the 2023/24 season is 56.5 million metric tons harvested on 29.6 million hectares and with a yield of 1.91 metric tons/hectare.

Please see Table 1 for the world sunflower seed supply and disappearance figures.

Season	2018/19	2019/20	2020/21	2021/22	2022/23 (Revised)	2023/24 (Forecast)
Area Harvested (1 000 Ha)	27 185	27 413	28 045	29 877	29 801	29 552
Yield (MT/Ha)	1.91	2.03	1.81	1.95	1.85	1.91
Production (1 000 MT)						
Argentina	3 530	3 020	3 200	3 360	4 130	3 600
European Union	9 482	9 469	8 969	10 389	9 520	9 863
China	2 550	2 680	2 750	2 880	2 930	3 000
Russia	12 756	15 379	13 420	15 660	16 600	16 800
Ukraine	15 250	16 500	13 900	16 900	12 400	14 400
United States	956	887	1 353	864	1 276	1 027
South Africa	678	810	678	846	724	830
Turkey	1 530	1 700	1 580	1 750	1 820	1 320
Other	5 292	5 202	4 995	5 652	5 834	5 674
TOTAL	52 024	55 647	50 845	58 301	55 234	56 514
Import (1 000 MT)						
Turkey	1 051	1 058	844	673	981	580
European Union	550	1 057	817	1 807	1 466	896
Other	1 445	1 451	1 308	1 639	1 513	1 571
TOTAL	3 046	3 566	2 969	4 119	3 960	3 047
Export (1 000 MT)						
Argentina	149	214	178	158	91	140
United States	87	64	72	69	64	72
Russia	338	1 278	528	280	285	352
Ukraine	119	76	186	1 793	1 685	640
Other	2 392	1 980	1 907	1 875	1 750	1 806
TOTAL	3 085	3 612	2 871	4 175	3 875	3 010
Oilseed crushed	47 231	50 300	45 568	48 315	52 192	52 586

National Sunflower Association website www.sunflowernsa.com,
Table updated January 16, 2024; Source: Oil World & USDA.

Sunflower seed production is very suitable for South African climatic conditions. Sunflower plants are drought tolerant and thus a crucial risk diversification crop going forward. The deep root system of a sunflower plant 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 utilised for sunflower production decreased by 17% to 555 700 ha, compared to the 670 700 ha of the previous season. The national yield average increased by just more than 3% from to 1.26 t/ha in the previous season to 1.30 t/ha this season.

According to *The Bureau for Food and Agricultural Policy (BFAP) Baseline, Agricultural Outlook 2023 – 2032*, an area of 500 000 hectares is expected to be planted to sunflower by 2032. The rising prevalence of *Sclerotinia sclerotiorum* is expected to remain a challenge, adding costs for producers and resulting in some area shifting to soybeans in affected regions. Despite the normalisation in area, production growth is supported by a projected 21% gain in yields over the coming decade, reflecting technological gains and continuous improvement in production practices. This will be sufficient to meet the growth in domestic demand.

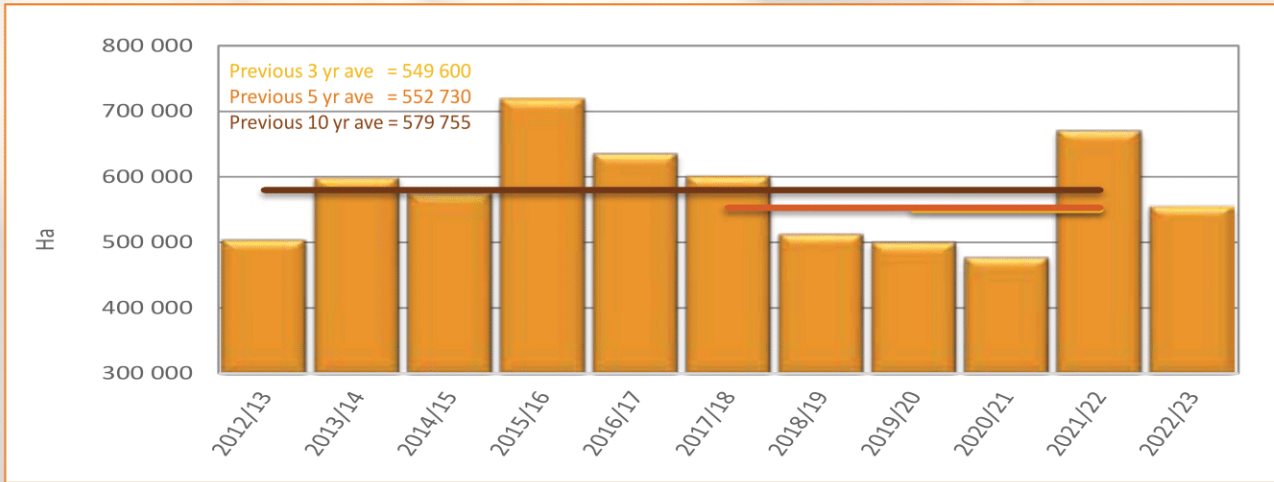
The latest seed technology is providing promising results in high-oil content cultivars, without significant compromise in yields per hectare. High oil content cultivars will support the relative competitiveness of local sunflower crushing plants.

Please see Table 2 for an overview of sunflower production under dry land conditions versus irrigation in the 2022/23 season, compared to the 2021/22 season. Graphs 2 to 4 provide national figures with regards to hectares planted, tonnage 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.

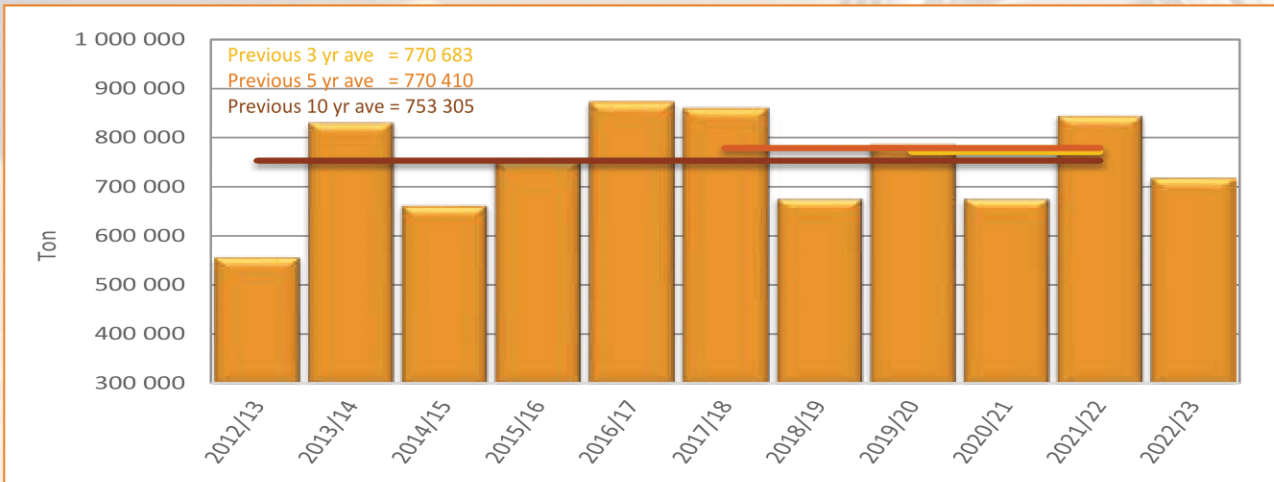
Province	Type of production	2022/23			2021/22		
		Hectares planted, ha	Production, tons	Yield, t/ha	Hectares planted, ha	Production, tons	Yield, t/ha
Western Cape	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
Northern Cape	Dryland	-	-	-	-	-	-
	Irrigation	2 500	6 250	2.50	2 500	6 250	2.50
	Total	2 500	6 250	2.50	2 500	6 250	2.50
Free State	Dryland	283 000	385 000	1.36	350 000	483 000	1.38
	Irrigation	7 000	17 000	2.43	7 000	16 800	2.40
	Total	290 000	402 000	1.39	357 000	499 800	1.40
Eastern Cape	Dryland	700	1 400	2.00	30	48	1.60
	Irrigation	-	-	-	270	702	2.60
	Total	700	1 400	2.00	300	750	2.50
KwaZulu-Natal	Dryland	300	600	2.00	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	300	600	2.00	-	-	-
Mpumalanga	Dryland	5 000	7 140	1.43	3 500	5 250	1.50
	Irrigation	-	-	-	-	-	-
	Total	5 000	7 140	1.43	3 500	5 250	1.50
Limpopo	Dryland	99 000	72 600	0.73	107 000	72 200	0.67
	Irrigation	1 000	2 400	2.40	3 000	4 800	1.60
	Total	100 000	75 000	0.75	110 000	77 000	0.70
Gauteng	Dryland	2 200	2 860	1.30	2 400	3 000	1.25
	Irrigation	-	-	-	-	-	-
	Total	2 200	2 860	1.30	2 400	3 000	1.25
North West	Dryland	152 900	221 250	1.45	193 200	250 500	1.30
	Irrigation	2 100	3 500	1.67	1 800	3 000	1.67
	Total	155 000	224 750	1.45	195 000	253 500	1.30
RSA	Dryland	543 100	690 850	1.27	656 130	813 998	1.24
	Irrigation	12 600	29 150	2.31	14 570	31 552	2.17
	Total	555 700	720 000	1.30	670 700	845 550	1.26

Figures provided by the CEC.

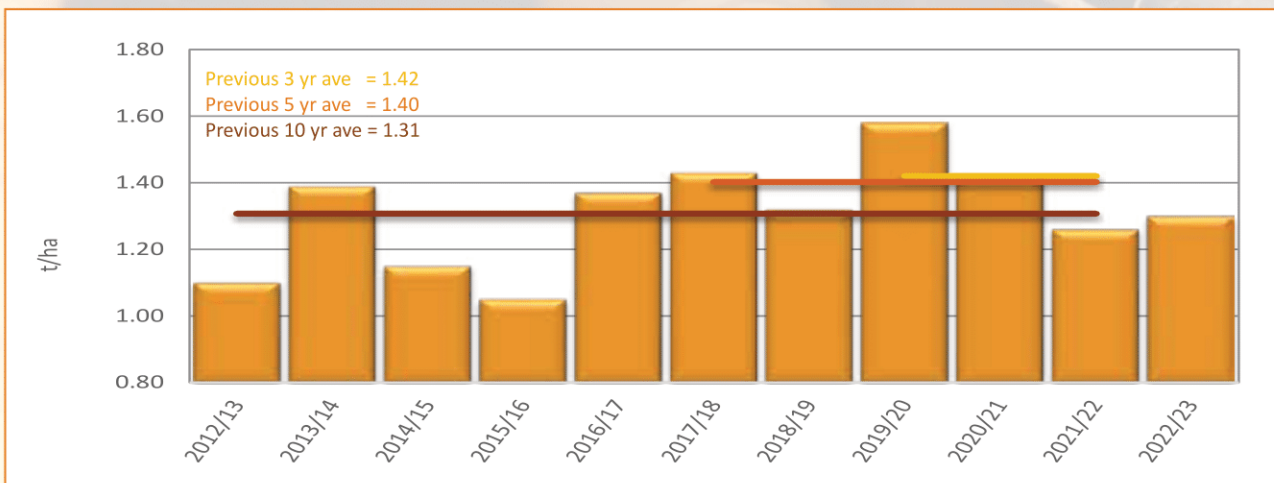
Graph 2: Total RSA area utilised for sunflower production from 2012/13 to 2022/23



Graph 3: Sunflower production in RSA from 2012/13 to 2022/23

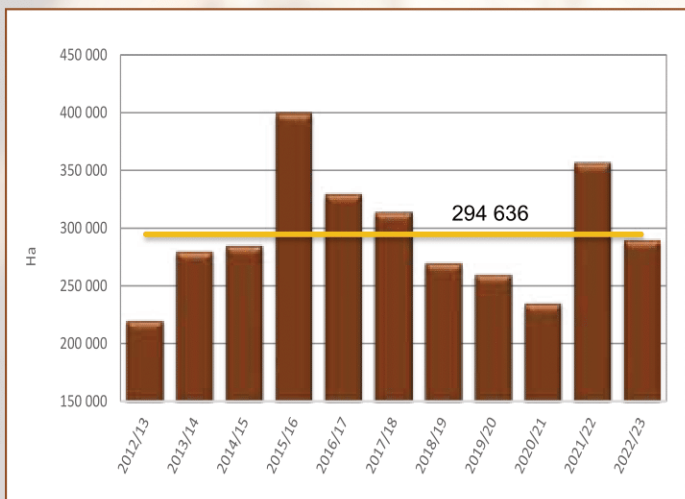


Graph 4: RSA Sunflower yield from 2012/13 to 2022/23

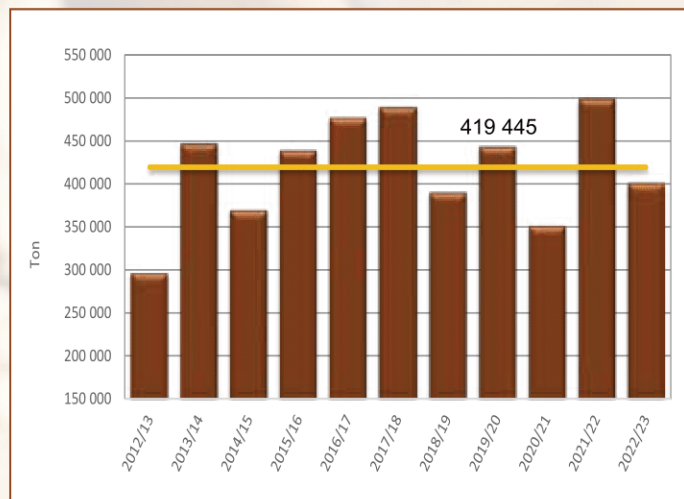


Figures provided by the CEC.

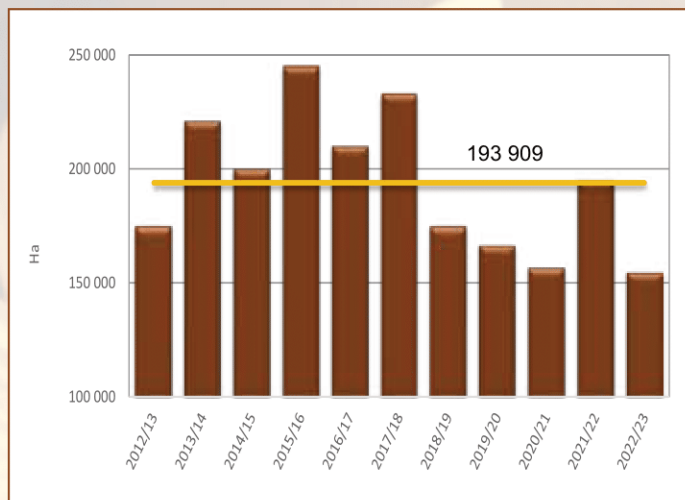
Graph 5: Area utilised for sunflower production in the Free State since 2012/13



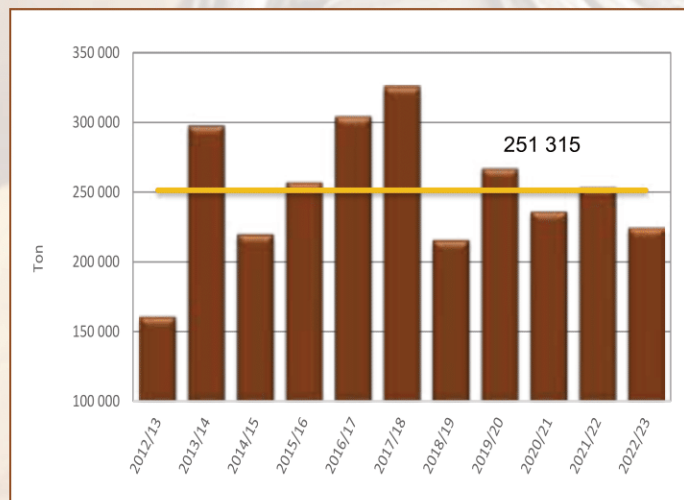
Graph 6: Sunflower production in the Free State since 2012/13



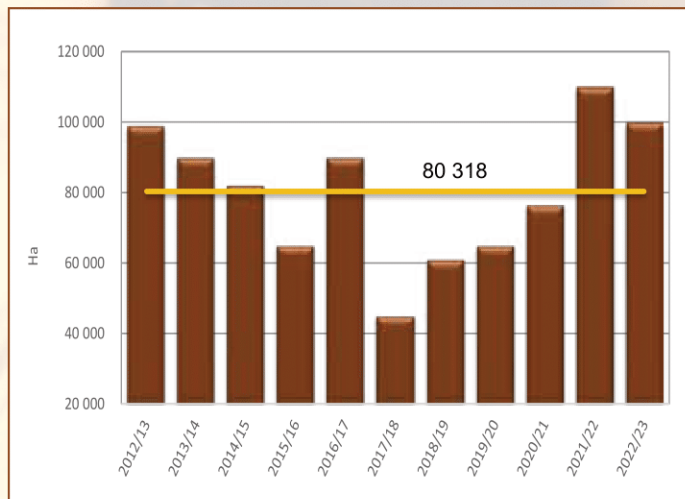
Graph 7: Area utilised for sunflower production in North West since 2012/13



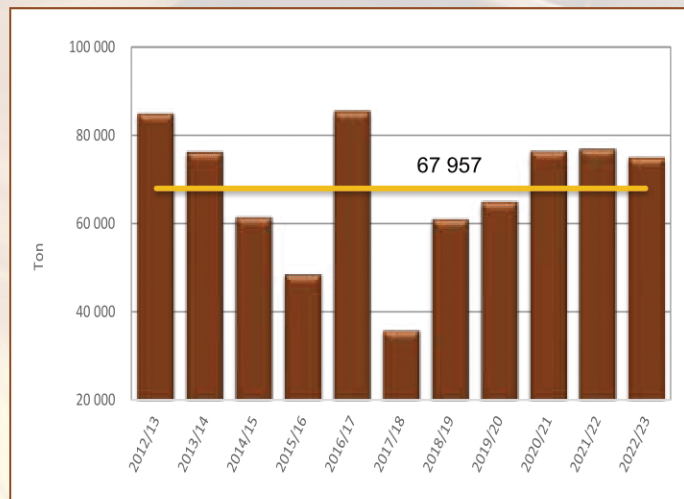
Graph 8: Sunflower production in North West since 2012/13



Graph 9: Area utilised for sunflower production in Limpopo since 2012/13



Graph 10: Sunflower production in Limpopo since 2012/13



Figures provided by the CEC.

— Eleven season average