

South African

Commercial sunflower quality for the 2018/2019 Season

Acknowledgements

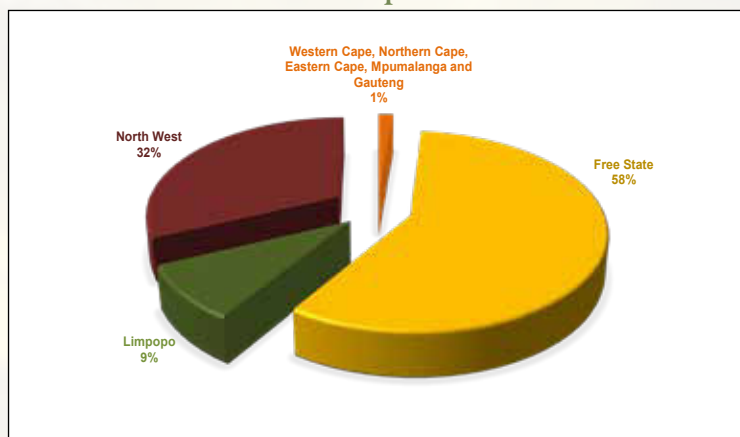
With gratitude to:

- *The Oil & Protein Seed Development Trust for its financial support in conducting this survey.*
- *Agbiz Grain and its members for their cooperation in providing the samples to make this survey possible.*
- *The Crop Estimates Committee (CEC) of the Department of Agriculture, Forestry and Fisheries (DAFF/DALRRD) for providing production related figures.*
- *South African Grain Information Service (SAGIS) for providing supply and demand figures relating to sunflower.*
- *The Bureau for Food and Agricultural Policy (BFAP) for providing research based market analysis.*
- *Precision Oil Laboratories for providing Fatty Acid Profile analyses.*

Introduction

The final commercial sunflower crop figure of the 2018/19 season as overseen by the National Crop Estimates Liaison Committee (CELC) is 678 000 tons, a decrease of 2 940 tons or -0.43% compared to the final crop estimate figure. The crop decreased by 21.3% (184 000 tons) year on year. The major sunflower-producing provinces, namely the Free State and North West, contributed 89.6% of the total crop.

Graph 1: Contribution of the provinces to the production of the 2018/19 sunflower crop



Figures provided by the CEC.

During the harvesting season, a representative sample of each delivery of sunflower seed at the various grain intake points, was taken according to the prescribed grading regulations. The sampling procedure for the samples used in this survey is described on page 36. One hundred and seventy six (176) composite sunflower samples, representing the different production regions, were analysed for quality. The samples were graded, milled and analysed for moisture, crude protein, crude fat, crude fibre and ash content. Twenty samples, randomly selected to represent the different production regions, were submitted to Precision Oil Laboratories for fatty acid profile analyses.

This is the seventh annual sunflower crop quality survey performed by The Southern African Grain Laboratory NPC (SAGL). SAGL was established in 1997 on request of the Grain Industry. SAGL is an ISO 17025 accredited testing laboratory and participates in a number of proficiency testing schemes, both nationally and internationally, as part of our ongoing quality assurance procedures to demonstrate technical competency and international comparability.

The goal of this crop quality survey is the compilation of a detailed database, accumulating quality data collected over several seasons on the national commercial sunflower crop, which is essential in assisting with decision making processes. The data reveal general tendencies and highlight quality differences in the commercial sunflower seed produced in different production regions nationally.

The results of this survey are available on the SAGL website (www.sagl.co.za). Hard copy reports are distributed to all the Directly Affected Groups and interested parties. The report is also available for download in a PDF format from the website.

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 2018/19 season conducted by the ARC-Grain Crops in collaboration with Agricol, Pannar, Pioneer, Syngenta, Sensako and Link Seed 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 2018/19 season stands at 52.3 million metric tons with the Ukraine and Russia contributing 53.6% to this total. The forecasted figure for the 2019/20 season is 54.4 million metric tons.

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

Table 1: World Sunflower Seed Supply and Disappearance (October through September)						
Season	2014/15	2015/16	2016/17	2017/18	2018/19 (Revised)	2019/20 (Forecast)
Area Harvested (1 000 Ha)	24 708	25 242	26 964	26 885	27 265	27 521
Yield (MT/Ha)	1.67	1.70	1.86	1.83	1.92	1.98
Production (1 000 MT)						
Argentina	3 000	2 830	3 300	3 400	3 730	3 400
European Union	9 006	7 769	8 641	10 058	9 484	9 465
China	2 380	2 698	2 750	2 580	2 550	2 500
Russia	9 000	9 700	11 600	11 000	12 756	14 600
Ukraine	10 250	12 100	15 100	13 400	15 250	15 750
United States	1 005	1 329	1 203	970	959	881
South Africa	736	755	874	862	681	800
Turkey	1 350	1 350	1 470	1 700	1 530	1 690
Other	4 607	4 386	5 130	5 086	5 353	5 354
TOTAL	41 334	42 914	50 068	49 056	52 290	54 440
Import (1 000 MT)						
Turkey	523	436	611	721	1 051	950
European Union	275	577	632	520	549	610
Other	1 078	1 100	1 396	1 322	1 397	1 674
TOTAL	1 876	2 113	2 639	2 563	2 997	3 234
Export (1 000 MT)						
Argentina	63	302	74	58	149	95
United States	126	107	99	89	87	80
Russia	61	105	362	103	337	600
Ukraine	123	171	261	50	119	120
Other	1 462	1 467	1 804	2 234	2 496	2 189
TOTAL	1 835	2 152	2 600	2 534	3 188	3 084
Oilseed crushed	36 581	38 177	44 845	44 663	47 218	49 568
<i>National Sunflower Association website www.sunflowermsa.com, Table updated January 13, 2020; Source: Oil World & 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 14.3% to 515 350 ha, compared to the 601 500 ha