

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

of the previous season. Late rainfall resulted in not all intended sunflower area being planted. This season's area planted is the lowest since the 2012/13 season. The national yield average decreased by almost 8% to 1.32 t/ha, slightly higher than the previous three- and five-year average of 1.28 t/ha.

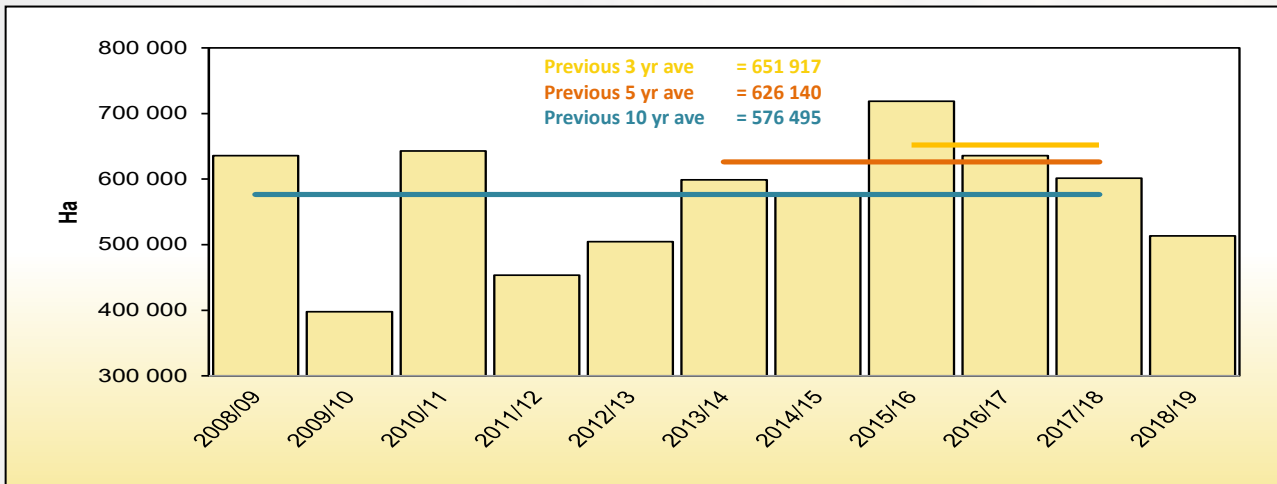
According to The Bureau for Food and Agricultural Policy (BFAP) Baseline, Agricultural Outlook 2019 – 2028, fairly consistent yield growth is expected over the coming decade (assuming stable rainfall and continuously improving cultivars), with quicker gains for sunflower seed and white maize, compared to the other major summer crops. The removal of more marginal areas supports this greater average yield gains. The total area planted to sunflower seed and white maize is however expected to decline.

Please see Table 2 for an overview of sunflower production under dry land conditions versus irrigation in the 2018/19 season, compared to the 2017/18 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.

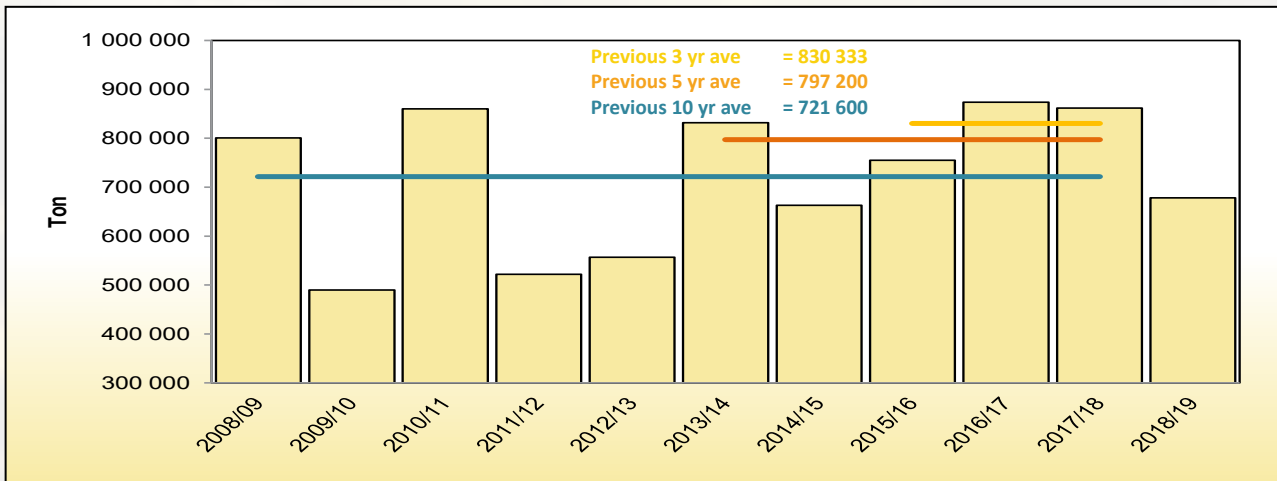
Table 2: Sunflower production overview over two seasons							
Province	Type of production	2018/19			2017/18		
		Hectares planted, ha	Production, tons	Yield, t/ha	Hectares planted, ha	Production, tons	Yield, t/ha
Western Cape	Dryland	-	-	-	100	100	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	100	100	-
Northern Cape	Dryland	-	-	-	-	-	-
	Irrigation	950	1 140	1.20	1 600	1 920	1.20
	Total	950	1 140	1.20	1 600	1 920	1.20
Free State	Dryland	265 500	382 050	1.44	312 200	486 000	1.56
	Irrigation	4 500	9 450	2.10	1 800	4 000	2.22
	Total	270 000	391 500	1.45	314 000	490 000	1.56
Eastern Cape	Dryland	100	260	2.60	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	100	260	2.60	-	-	-
KwaZulu-Natal	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
Mpumalanga	Dryland	4 500	4 500	1.00	2 300	2 180	0.95
	Irrigation	-	-	-	-	-	-
	Total	4 500	4 500	1.00	2 300	2 180	0.95
Limpopo	Dryland	60 000	58 800	0.98	44 500	34 750	0.78
	Irrigation	1 000	2 200	2.20	500	1 250	2.50
	Total	61 000	61 000	1.00	45 000	36 000	0.80
Gauteng	Dryland	3 550	3 300	0.93	5 050	4 500	0.89
	Irrigation	250	500	2.00	450	1 100	2.44
	Total	3 800	3 800	1.00	5 500	5 600	1.02
North West	Dryland	174 100	214 000	1.23	231 900	323 950	1.40
	Irrigation	900	1 800	2.00	1 100	2 250	2.05
	Total	175 000	215 800	1.23	233 000	326 200	1.40
RSA	Dryland	507 750	662 910	1.31	596 050	851 480	1.43
	Irrigation	7 600	15 090	1.99	5 450	10 520	1.93
	Total	515 350	678 000	1.32	601 500	862 000	1.43

Figures provided by the CEC.

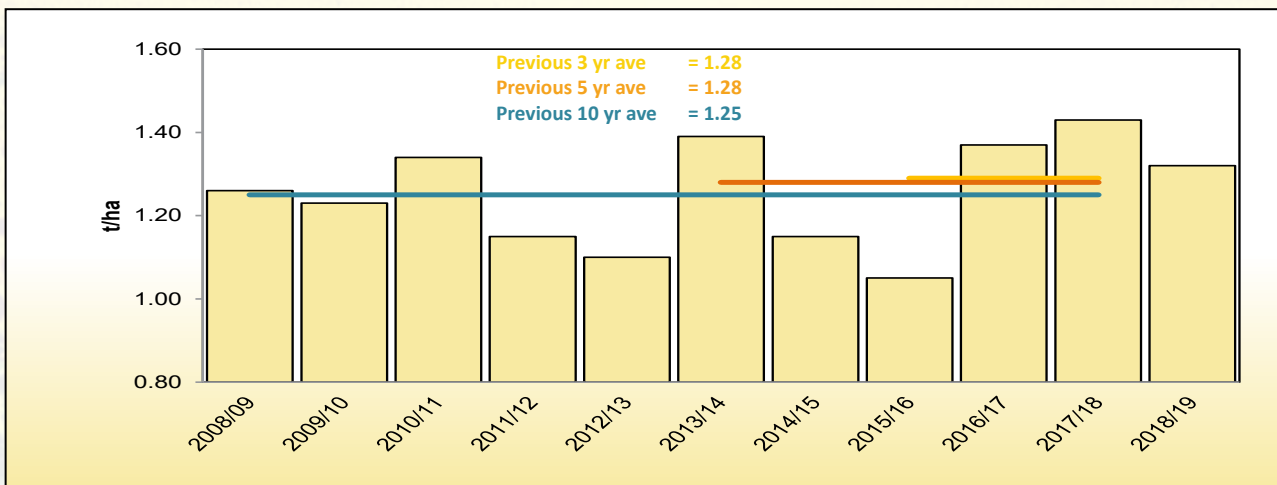
Graph 2: Total RSA area utilised for sunflower production from 2008/09 to 2018/19



Graph 3: Sunflower production in RSA from 2008/09 to 2018/19

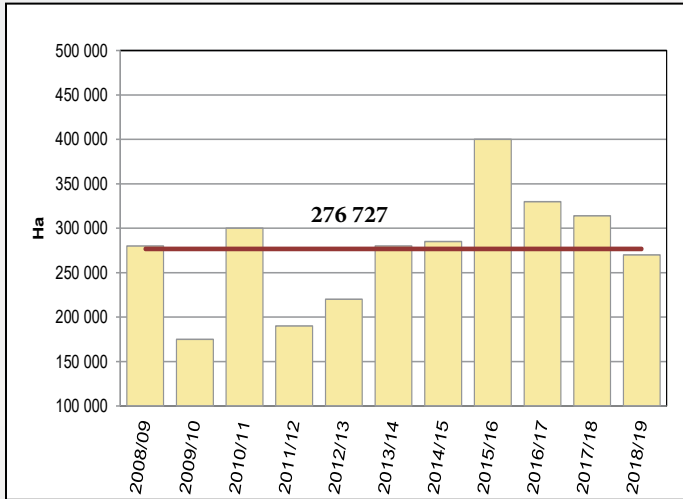


Graph 4: RSA Sunflower yield from 2008/09 to 2018/19

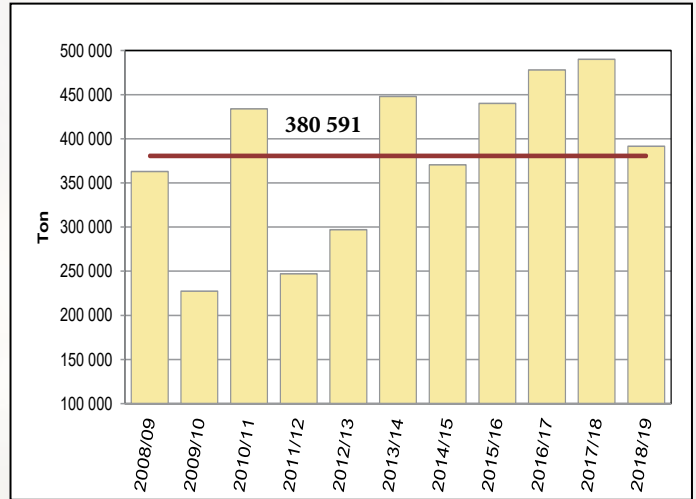


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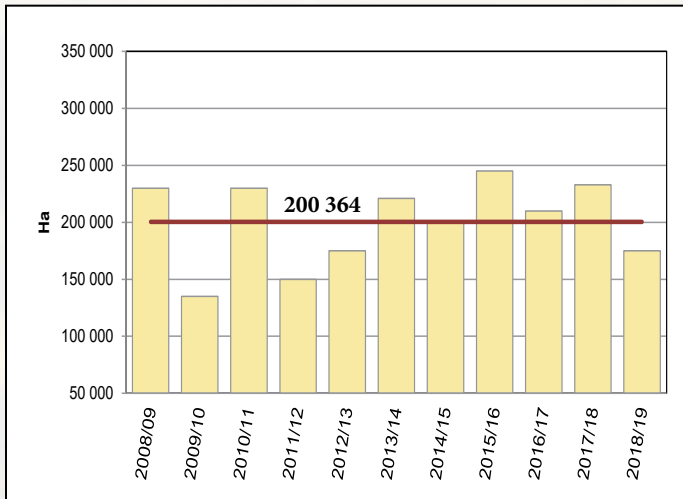
Graph 5: Area utilised for sunflower production in the Free State since 2008/09



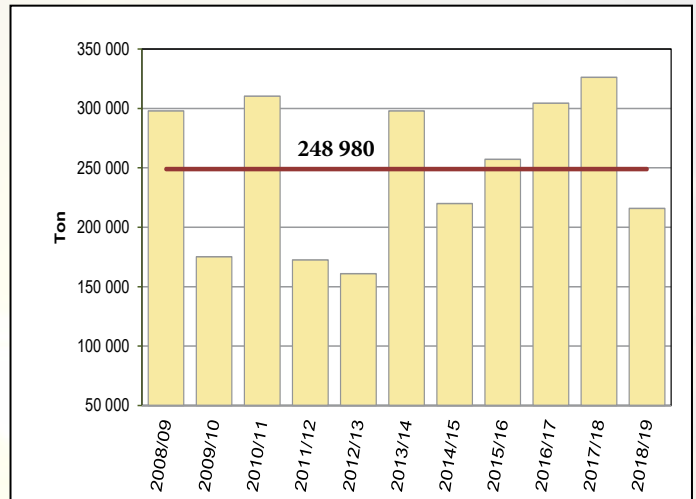
Graph 6: Sunflower production in the Free State since 2008/09



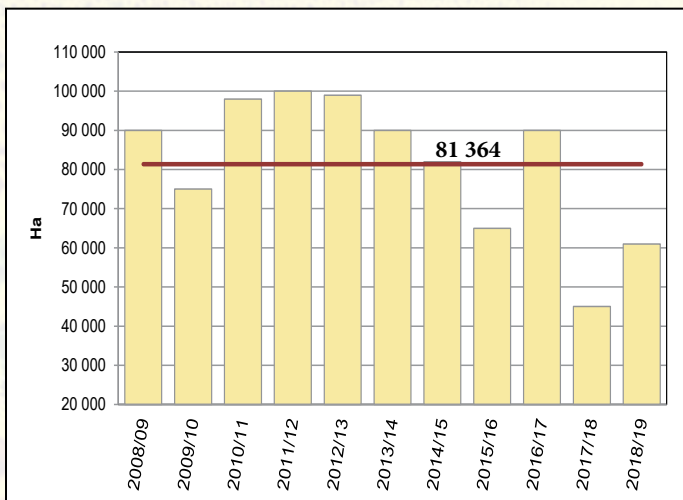
Graph 7: Area utilised for sunflower production in North West since 2008/09



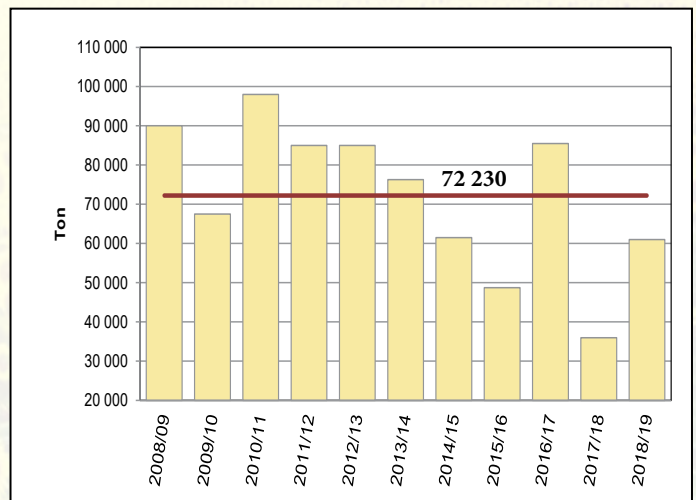
Graph 8: Sunflower production in North West since 2008/09



Graph 9: Area utilised for sunflower production in Limpopo since 2008/09



Graph 10: Sunflower production in Limpopo since 2008/09



Figures provided by the CEC.

— Eleven season average