

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 2021/22 season, conducted by the ARC-Grain Crops Institute in collaboration with Agricol, Pannar, Pioneer, Syngenta, Sensako and Limagrain, 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 2021/22 season stands at 57.9 million metric tons with the Ukraine and Russia contributing 56% to this total. An area of 30.2 million hectares were harvested resulting in a yield of 1.92 metric tons/hectare. The forecasted figure for the 2022/23 season is 52.9 million metric tons harvested on 28.7 million hectares and with a yield of 1.84 metric tons/hectare.

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

<b>Table 1: World Sunflower Seed Supply and Disappearance (October through September)</b>						
<b>Season</b>	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>2021/22 (Revised)</b>	<b>2022/23 (Forecast)</b>
<b>Area Harvested (1 000 Ha)</b>	<b>26 885</b>	<b>27 265</b>	<b>27 413</b>	<b>28 045</b>	<b>30 152</b>	<b>28 714</b>
<b>Yield (MT/Ha)</b>	<b>1.83</b>	<b>1.91</b>	<b>2.03</b>	<b>1.81</b>	<b>1.92</b>	<b>1.84</b>
<b>Production (1 000 MT)</b>						
Argentina	3 400	3 530	3 020	3 200	3 400	3 700
European Union	10 058	9 482	9 469	8 969	10 467	9 529
China	2 580	2 550	2 680	2 750	2 880	2 900
Russia	11 000	12 756	15 379	13 420	15 400	16 000
Ukraine	13 400	15 250	16 500	13 900	16 800	10 600
United States	970	956	887	1 353	864	1 276
South Africa	862	678	810	678	846	800
Turkey	1 700	1 530	1 700	1 580	1 750	2 050
Other	5 086	5 292	5 202	4 995	5 532	6 003
<b>TOTAL</b>	<b>49 056</b>	<b>52 024</b>	<b>55 647</b>	<b>50 845</b>	<b>57 939</b>	<b>52 858</b>
<b>Import (1 000 MT)</b>						
Turkey	721	1 051	1 058	844	673	570
European Union	520	550	1 057	817	1 805	1 936
Other	1 322	1 445	1 451	1 308	1 704	1 735
<b>TOTAL</b>	<b>2 563</b>	<b>3 046</b>	<b>3 566</b>	<b>2 969</b>	<b>4 182</b>	<b>4 241</b>
<b>Export (1 000 MT)</b>						
Argentina	58	149	214	178	158	155
United States	89	87	64	72	69	78
Russia	103	338	1 278	528	281	250
Ukraine	50	119	76	186	1 793	2 080
Other	2 234	2 392	1 980	1 907	1 895	1 762
<b>TOTAL</b>	<b>2 534</b>	<b>3 085</b>	<b>3 612</b>	<b>2 871</b>	<b>4 196</b>	<b>4 325</b>
<b>Oilseed crushed</b>	<b>44 663</b>	<b>47 231</b>	<b>50 300</b>	<b>45 568</b>	<b>48 526</b>	<b>49 346</b>
National Sunflower Association website <a href="http://www.sunflowernsa.com">www.sunflowernsa.com</a> , Table updated January 13, 2023; Source: Oil World & USDA.						

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 utilised for sunflower production increased by 40% to 670 700 ha, compared to the 477 800 ha of the previous season. The national yield average decreased by 11% from 1.42 t/ha in the previous season to 1.26 t/ha this season.

According to *The Bureau for Food and Agricultural Policy (BFAP) Baseline, Agricultural Outlook 2022 – 2031*, the area under sunflower should stabilise at around 500 000 hectares in the medium term. 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 23% gain in yields over the coming decade, reflecting technological gains and continuous improvement in production practices. This is sufficient to meet the growth in domestic demand.

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

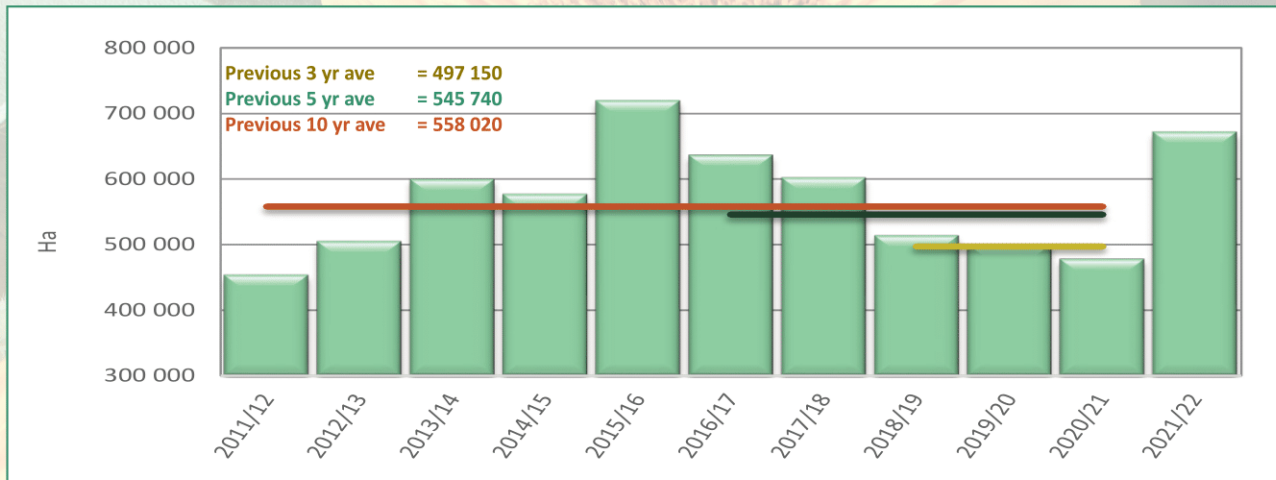
Please see Table 2 for an overview of sunflower production under dry land conditions versus irrigation in the 2021/22 season, compared to the 2020/21 season. Graphs 2 to 4 provide national figures with regards to hectares planted, tons produced and yields obtained over the last 11 seasons and Graphs 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	2021/22			2020/21		
		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	1 100	1 320	1.20
	Total	2 500	6 250	2.50	1 100	1 320	1.20
Free State	Dryland	350 000	483 000	1.38	229 200	338 000	1.47
	Irrigation	7 000	16 800	2.40	5 800	14 500	2.50
	Total	357 000	499 800	1.40	235 000	352 500	1.50
Eastern Cape	Dryland	30	48	1.60	120	120	1.00
	Irrigation	270	702	2.60	180	330	1.83
	Total	300	750	2.50	300	450	1.50
KwaZulu-Natal	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
Mpumalanga	Dryland	3 500	5 250	1.50	3 500	5 250	1.50
	Irrigation	-	-	-	-	-	-
	Total	3 500	5 250	1.50	3 500	5 250	1.50
Limpopo	Dryland	107 000	72 200	0.67	73 500	70 800	0.96
	Irrigation	3 000	4 800	1.60	3 000	5 700	1.90
	Total	110 000	77 000	0.70	76 500	76 500	1.00
Gauteng	Dryland	2 400	3 000	1.25	4 400	5 720	1.30
	Irrigation	-	-	-	-	-	-
	Total	2 400	3 000	1.25	4 400	5 720	1.30
North West	Dryland	193 200	250 500	1.30	155 500	233 100	1.50
	Irrigation	1 800	3 000	1.67	1 500	3 160	2.11
	Total	195 000	253 500	1.30	157 000	236 260	1.50
RSA	Dryland	656 130	813 998	1.24	466 220	652 990	1.40
	Irrigation	14 570	31 552	2.17	11 580	25 010	2.16
	Total	670 700	845 550	1.26	477 800	678 000	1.42

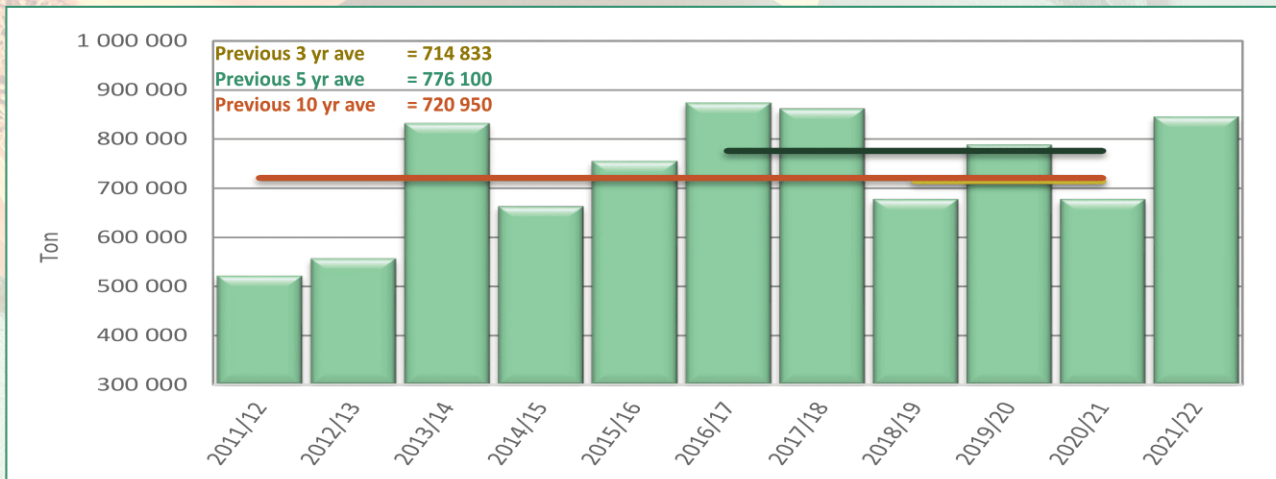
Figures provided by the CEC.



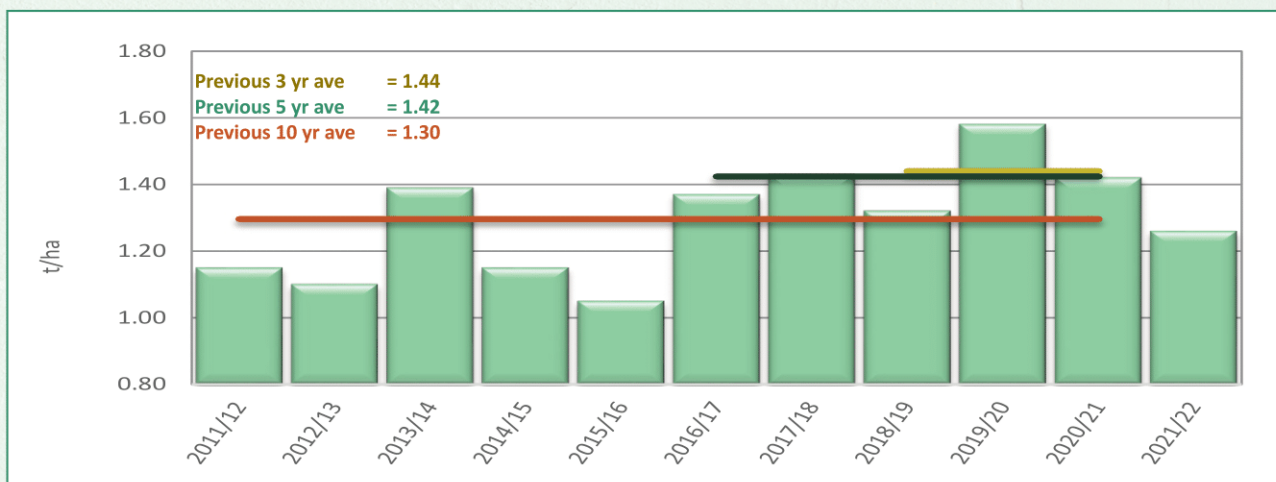
Graph 2: Total RSA area utilised for sunflower production from 2011/12 to 2021/22



Graph 3: Sunflower production in RSA from 2011/12 to 2021/22



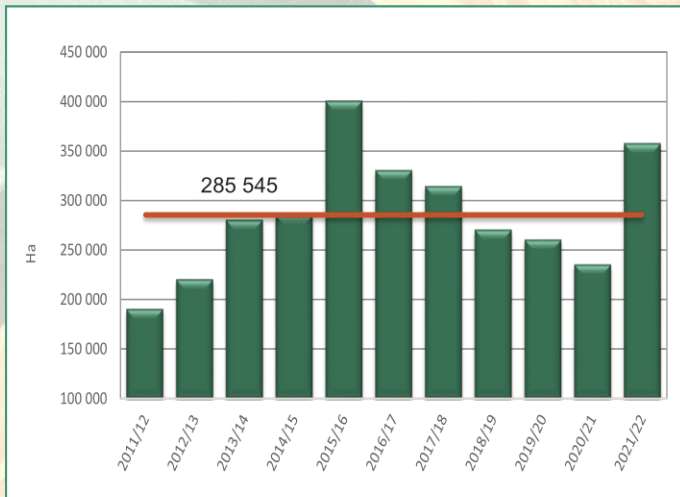
Graph 4: RSA Sunflower yield from 2011/12 to 2021/22



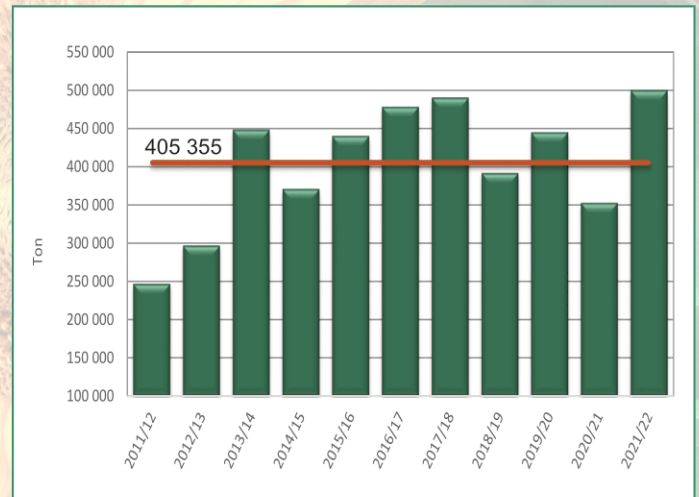
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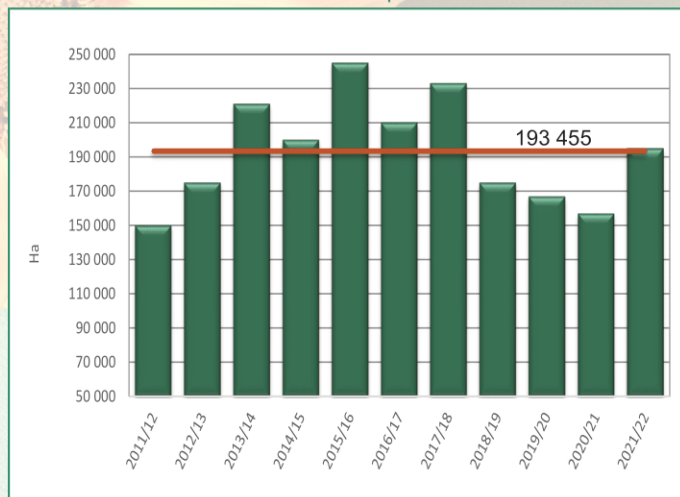
Graph 5: Area utilised for sunflower production in the Free State since 2011/12



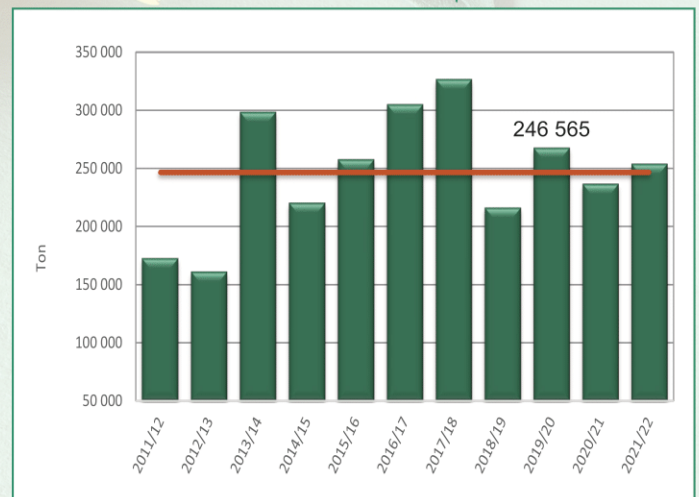
Graph 6: Sunflower production in the Free State since 2011/12



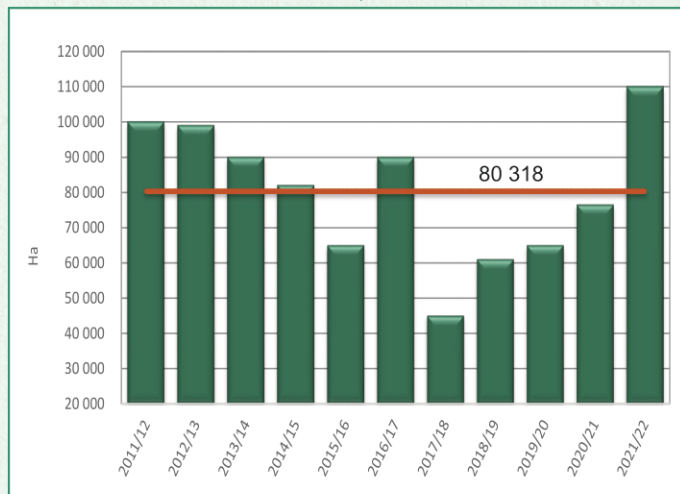
Graph 7: Area utilised for sunflower production in North West since 2011/12



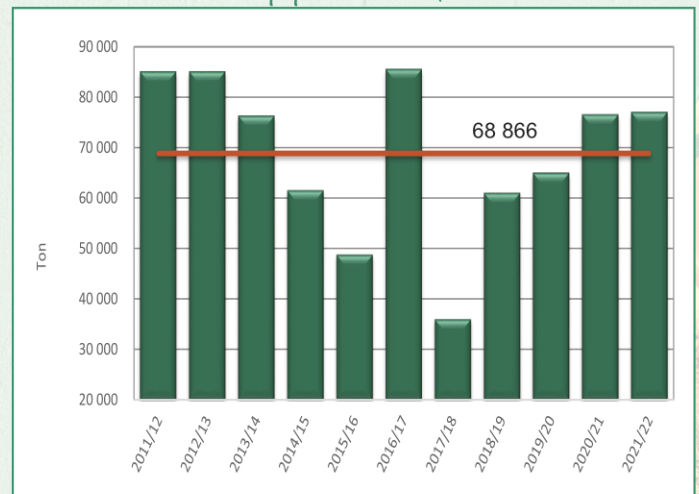
Graph 8: Sunflower production in North West since 2011/12



Graph 9: Area utilised for sunflower production in Limpopo since 2011/12



Graph 10: Sunflower production in Limpopo since 2011/12



Figures provided by the CEC.

— Eleven season average