

South African Commercial sunflower quality for the 2016/2017 Season



Acknowledgements

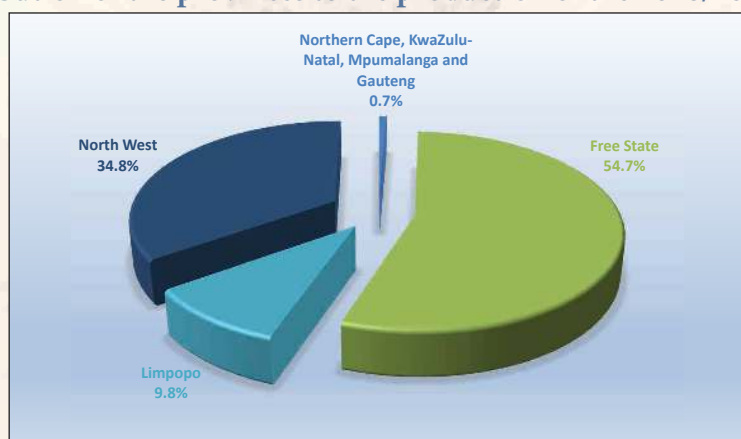
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Introduction

The final commercial sunflower crop figure of the 2016/2017 season as overseen by the National Crop Estimates Liaison Committee (CELC) is 874 000 tons, this is 595 tons or 0.07% lower than the final crop estimate figure. The crop increased by almost 16% (119 000 tons) year on year. The major sunflower-producing provinces, namely the Free State and North West, contributed 89.5% of the total crop.

Graph 1: Contribution of the provinces to the production of the 2016/2017 sunflower crop



Figures provided by the CEC.

During the harvesting season, a representative sample of each delivery of sunflower seed at the various silos was taken according to the prescribed grading regulations. The sampling procedure for the samples used in this survey is described on page 27. 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.

This is the fifth 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 produced in different local production regions.

The results of this survey are available on the SAGL website (www.sagl.co.za). The 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 2016/2017 season conducted by the ARC-Grain Crops in collaboration with Agricol, Pannar, Pioneer and AGT is also included in this report, as is the national grading regulations as published in the Government Gazette No. 45 of 22 January 2016.

Production

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 11.5%, compared to the 718 500 hectares in the severely drought affected 2015/2016 season. The 635 750 hectares planted this season, is however in line with the average of the previous three seasons. Production increased by 15.8% as a result of the yield increase of 30.5%, from 1.05 t/ha last season to 1.37 t/ha this season.

World sunflower seed production for the 2016/2017 season stands at 50 053 million tons with the Ukraine and Russia contributing 54% to this total. The forecasted figure for the 2017/2018 season is 48 552 million tons. Please see Table 1 for the world sunflower seed supply and demand figures.

Table 1: World Sunflower Seed Supply and Demand (October through September)						
Season	2012/13	2013/14	2014/15	2015/16	2016/17 (Revised)	2017/17 (Forecast)
Area Harvested (1 000 Ha)	25 470	25 730	24 708	25 242	26 923	27 703
Yield (MT/Ha)	1.40	1.68	1.67	1.70	1.86	1.75
Production (1 000 MT)						
Argentina	2 850	2 250	3 000	2 830	3 300	3 700
European Union	7 018	9 105	9 006	7 769	8 545	9 544
China	1 730	2 423	2 380	2 698	2 750	2 800
Russia	8 000	10 200	9 000	9 700	11 700	10 800
Ukraine	8 387	10 941	10 250	12 100	15 100	13 200
United States	1 264	917	1 005	1 326	1 203	984
South Africa	736	736	736	755	875	800
Turkey	1 100	1 450	1 350	1 350	1 470	1 700
Other	4 662	5 315	4 607	4 386	5 110	5 024
TOTAL	35 747	43 337	41 334	42 914	50 053	48 552
Import (1 000 MT)						
Turkey	627	581	523	436	611	600
European Union	220	329	275	577	632	360
Other	638	1 050	1 078	1 100	1 411	1 491
TOTAL	1 485	1 960	1 876	2 113	2 654	2 451
Export (1 000 MT)						
Argentina	85	80	63	302	74	60
United States	144	132	126	107	99	90
Russia	59	131	61	105	362	180
Ukraine	124	71	123	171	261	160
Other	1 128	1 536	1 462	1 467	1 826	1 988
TOTAL	1 540	1 950	1 835	2 152	2 622	2 478
Oilseed crushed	32 355	38 360	36 581	38 177	44 878	43 722

National Sunflower Association website www.sunflowernsa.com, Table updated January 16, 2018; Source: Oil World & USDA.