

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.

<b>Table 1: World Sunflower Seed Supply and Demand (October through September)</b>						
Season	2012/13	2013/14	2014/15	2015/16	2016/17 (Revised)	2017/17 (Forecast)
<b>Area Harvested (1 000 Ha)</b>	<b>25 470</b>	<b>25 730</b>	<b>24 708</b>	<b>25 242</b>	<b>26 923</b>	<b>27 703</b>
<b>Yield (MT/Ha)</b>	<b>1.40</b>	<b>1.68</b>	<b>1.67</b>	<b>1.70</b>	<b>1.86</b>	<b>1.75</b>
<b>Production (1 000 MT)</b>						
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
<b>TOTAL</b>	<b>35 747</b>	<b>43 337</b>	<b>41 334</b>	<b>42 914</b>	<b>50 053</b>	<b>48 552</b>
<b>Import (1 000 MT)</b>						
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
<b>TOTAL</b>	<b>1 485</b>	<b>1 960</b>	<b>1 876</b>	<b>2 113</b>	<b>2 654</b>	<b>2 451</b>
<b>Export (1 000 MT)</b>						
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
<b>TOTAL</b>	<b>1 540</b>	<b>1 950</b>	<b>1 835</b>	<b>2 152</b>	<b>2 622</b>	<b>2 478</b>
<b>Oilseed crushed</b>	<b>32 355</b>	<b>38 360</b>	<b>36 581</b>	<b>38 177</b>	<b>44 878</b>	<b>43 722</b>

National Sunflower Association website [www.sunflowernsa.com](http://www.sunflowernsa.com), Table updated January 16, 2018; Source: Oil World & USDA.

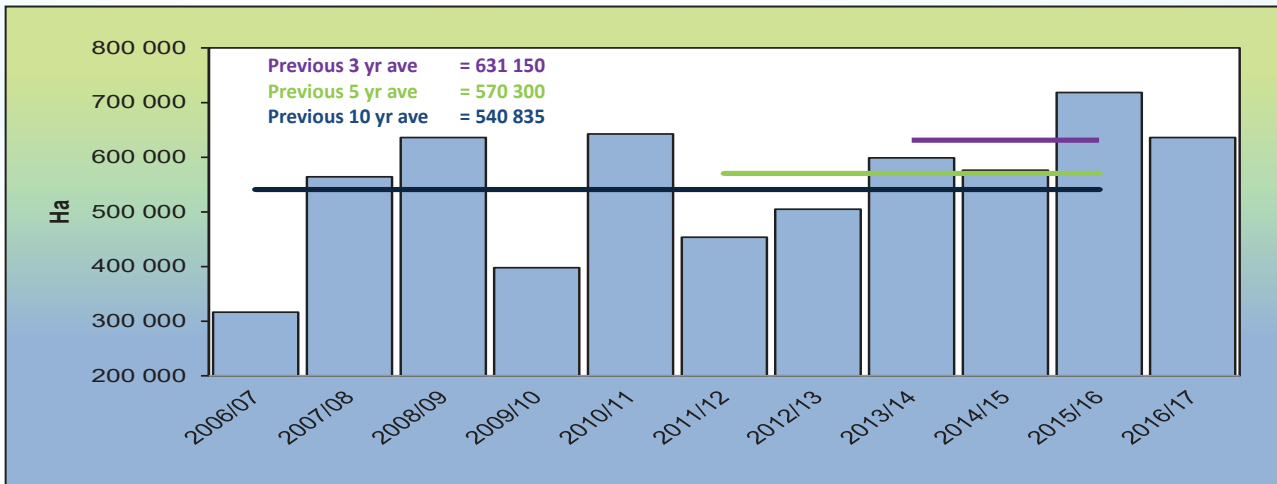
According to *The Bureau for Food and Agricultural Policy (BFAP) Baseline, Agricultural Outlook 2017 – 2026*, sunflower area is expected to decline at an average annual rate of 1.5%, to just under 530 000 by 2026. Yields are however projected to increase on average by 2.5% per annum, resulting in a crop just exceeding 810 000 tons in 2026. The production and crushing demand for sunflower seed is projected to remain in a fine balance over the 2017 to 2026 outlook period, imports of approximately 20 000 tons is projected by 2026. A temporary surplus of sunflower seeds is expected to result in net exports during 2017. Positive net imports, remaining below 10% of crushing demand is however projected going forward.

Please see Table 2 for an overview of sunflower production under dry land conditions versus irrigation in the 2016/2017 season, compared to the 2015/2016 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, North West and Limpopo.

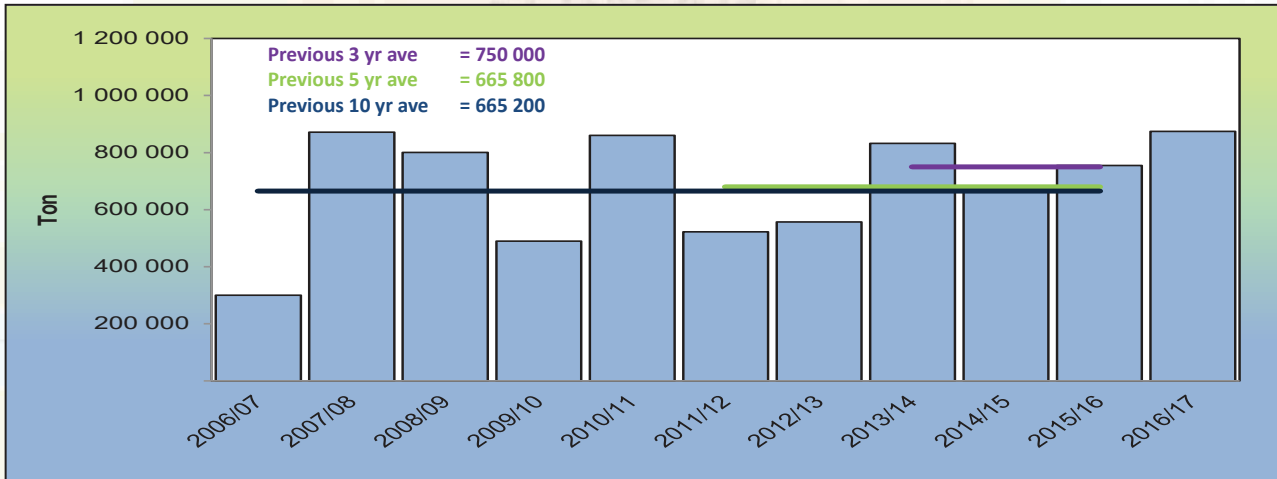
Table 2: Sunflower production overview over two seasons							
Province	Type of production	2016/2017			2015/2016		
		Hectares planted, ha	Production, tons	Yield, t/ha	Hectares planted, ha	Production, tons	Yield, t/ha
Western Cape	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
Northern Cape	Dryland	-	-	-	-	-	-
	Irrigation	250	400	1.60	500	600	1.20
	Total	250	400	1.60	500	600	1.20
Free State	Dryland	328 000	475 000	1.45	398 000	438 000	1.10
	Irrigation	2 000	3 000	1.50	2 000	2 000	1.00
	Total	330 000	478 000	1.45	400 000	440 000	1.10
Eastern Cape	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
KwaZulu-Natal	Dryland	300	300	1.00	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	300	300	1.00	-	-	-
Mpumalanga	Dryland	2 200	2 300	1.05	4 000	4 400	1.10
	Irrigation	-	-	-	-	-	-
	Total	2 200	2 300	1.05	4 000	4 400	1.10
Limpopo	Dryland	87 500	82 500	0.94	63 700	46 150	0.72
	Irrigation	2 500	3 000	1.20	1 300	2 600	2.00
	Total	90 000	85 500	0.95	65 000	48 750	0.75
Gauteng	Dryland	2 600	2 500	0.96	3 550	3 100	0.87
	Irrigation	400	500	1.25	450	900	2.00
	Total	3 000	3 000	1.00	4 000	4 000	1.00
North West	Dryland	207 500	300 000	1.45	244 000	255 000	1.05
	Irrigation	2 500	4 500	1.80	1 000	2 250	2.25
	Total	210 000	304 500	1.45	245 000	257 250	1.50
RSA	Dryland	628 100	862 600	1.37	713 250	746 650	1.05
	Irrigation	7 650	11 400	1.49	5 250	8 350	1.59
	Total	635 750	874 000	1.37	718 500	755 000	1.05

Figures provided by the CEC.

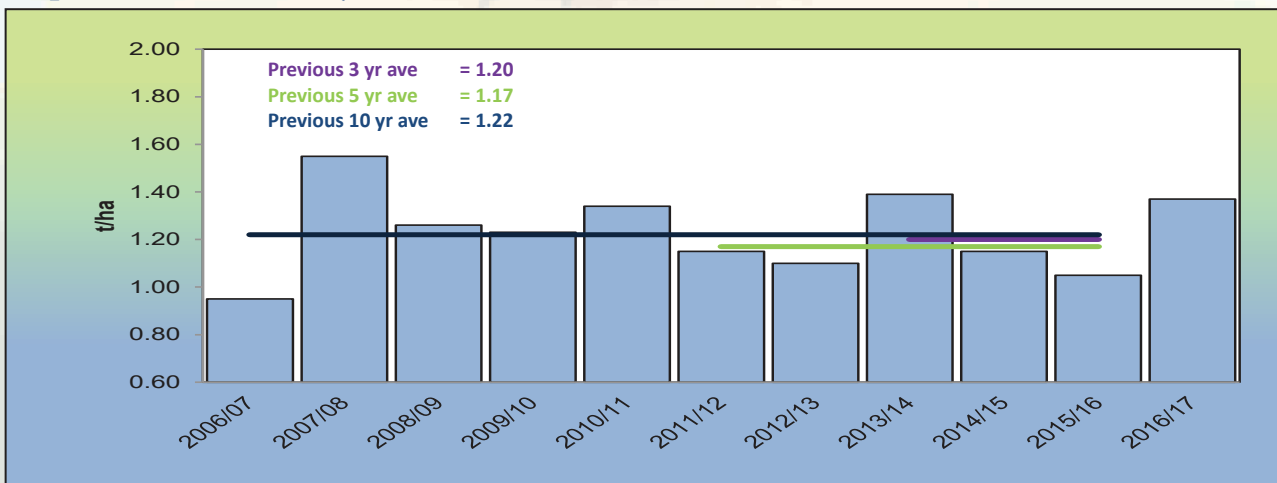
**Graph 2: Total RSA area utilised for sunflower production from 2006/07 to 2016/17**



**Graph 3: Sunflower production in RSA from 2006/07 to 2016/17**



**Graph 4: RSA Sunflower yield from 2006/07 to 2016/17**



Figures provided by the CEC.