

# South African Commercial sunflower quality for the 2017/2018 Season



## Acknowledgements

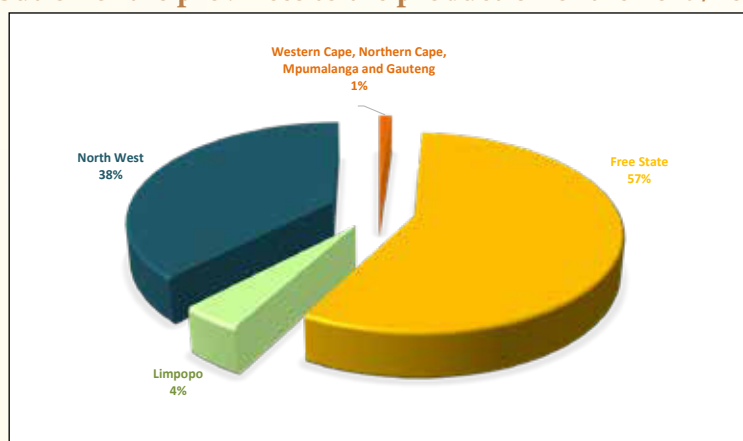
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- *South African Grain Information Service (SAGIS) for providing supply and demand figures relating to sunflower.*
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## Introduction

The final commercial sunflower crop figure of the 2017/2018 season as overseen by the National Crop Estimates Liaison Committee (CELC) is 862 000 tons, an increase of 3 395 tons or 0.40% compared to the final crop estimate figure. The crop decreased by 1.4% (12 000 tons) year on year. The major sunflower-producing provinces, namely the Free State and North West, contributed 95% of the total crop.

**Graph 1: Contribution of the provinces to the production of the 2017/2018 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 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 sixth 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](http://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 2017/2018 season conducted by the ARC-Grain Crops in collaboration with Agricol, Pannar, AGT, Pioneer and Syngenta 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 2017/2018 season stands at 49.6 million tons with the Ukraine and Russia contributing 49% to this total. The forecasted figure for the 2018/2019 season is 52.3 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  | 2013/14       | 2014/15       | 2015/16       | 2016/17       | 2017/18<br>(Revised) | 2018/19<br>(Forecast) |
| <b>Area Harvested (1 000 Ha)</b>  | <b>25 730</b> | <b>24 708</b> | <b>25 242</b> | <b>26 964</b> | <b>27 291</b>        | <b>27 802</b>         |
| <b>Yield (MT/Ha)</b>  | <b>1.68</b>   | <b>1.67</b>   | <b>1.70</b>   | <b>1.86</b>   | <b>1.82</b>          | <b>1.88</b>           |
| <b>Production (1 000 MT)</b>  |               |               |               |               |                      |                       |
| Argentina   | 2 250         | 3 000         | 2 830         | 3 300         | 3 400                | 3 800                 |
| European Union  | 9 105         | 9 006         | 7 769         | 8 641         | 9 985                | 9 546                 |
| China   | 2 423         | 2 380         | 2 698         | 2 750         | 2 800                | 2 860                 |
| Russia  | 10 200        | 9 000         | 9 700         | 11 600        | 11 000               | 12 000                |
| Ukraine   | 10 941        | 10 250        | 12 100        | 15 100        | 13 500               | 15 500                |
| United States   | 917           | 1 005         | 1 326         | 1 203         | 978                  | 961                   |
| South Africa  | 736           | 736           | 755           | 874           | 859                  | 740                   |
| Turkey  | 1 450         | 1 350         | 1 350         | 1 470         | 1 700                | 1 540                 |
| Other   | 5 315         | 4 607         | 4 386         | 5 130         | 5 343                | 5 341                 |
| <b>TOTAL</b>  | <b>43 337</b> | <b>41 334</b> | <b>42 914</b> | <b>50 068</b> | <b>49 565</b>        | <b>52 288</b>         |
| <b>Import (1 000 MT)</b>  |               |               |               |               |                      |                       |
| Turkey  | 581           | 523           | 436           | 611           | 721                  | 780                   |
| European Union  | 329           | 275           | 577           | 632           | 520                  | 600                   |
| Other   | 1 050         | 1 078         | 1 100         | 1 396         | 1 305                | 1 346                 |
| <b>TOTAL</b>  | <b>1 960</b>  | <b>1 876</b>  | <b>2 113</b>  | <b>2 639</b>  | <b>2 546</b>         | <b>2 726</b>          |
| <b>Export (1 000 MT)</b>  |               |               |               |               |                      |                       |
| Argentina   | 80            | 63            | 302           | 74            | 58                   | 100                   |
| United States   | 132           | 126           | 107           | 99            | 89                   | 70                    |
| Russia  | 131           | 61            | 105           | 362           | 98                   | 200                   |
| Ukraine   | 71            | 123           | 171           | 261           | 50                   | 200                   |
| Other   | 1 536         | 1 462         | 1 467         | 1 804         | 2 253                | 2 155                 |
| <b>TOTAL</b>  | <b>1 950</b>  | <b>1 835</b>  | <b>2 152</b>  | <b>2 600</b>  | <b>2 548</b>         | <b>2 725</b>          |
| <b>Oilseed crushed</b>  | <b>38 360</b> | <b>36 581</b> | <b>38 177</b> | <b>44 845</b> | <b>44 974</b>        | <b>47 114</b>         |
| <i>National Sunflower Association website <a href="http://www.sunflowernsa.com">www.sunflowernsa.com</a>, Table updated February 8, 2019; Source: Oil World &amp; 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 5.4% to 601 500 ha, compared to the 635 700 ha of the previous season. This season's area planted are in line with the 5-year average of 606 780 hectares. The national yield average increased by 4.4% to 1.43 t/ha, the highest national average to date.