

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 2020/21 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, 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 2020/21 season stands at 50.4 million metric tons with the Ukraine and Russia contributing 54% to this total. An area of 28.0 million hectares were harvested resulting in a yield of 1.80 metric tons/hectare. The forecasted figure for the 2021/22 season is 57.7 million metric tons harvested on 29.9 million hectares and with a yield of 1.93 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>2016/17</b>	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21 (Revised)</b>	<b>2021/22 (Forecast)</b>
<b>Area Harvested (1 000 Ha)</b>	<b>26 964</b>	<b>26 885</b>	<b>27 265</b>	<b>27 413</b>	<b>28 037</b>	<b>29 915</b>
<b>Yield (MT/Ha)</b>	<b>1.86</b>	<b>1.83</b>	<b>1.91</b>	<b>2.03</b>	<b>1.80</b>	<b>1.93</b>
<b>Production (1 000 MT)</b>						
Argentina	3 300	3 400	3 530	3 020	2 800	3 100
European Union	8 641	10 058	9 482	9 469	8 904	10 574
China	2 750	2 580	2 550	2 680	2 750	2 850
Russia	11 600	11 000	12 756	15 379	13 420	15 400
Ukraine	15 100	13 400	15 250	16 500	13 900	16 800
United States	1 203	970	956	887	1 353	863
South Africa	874	862	678	810	677	820
Turkey	1 470	1 700	1 530	1 700	1 580	1 750
Other	5 130	5 086	5 292	5 202	5 032	5 527
<b>TOTAL</b>	<b>50 068</b>	<b>49 056</b>	<b>52 024</b>	<b>55 647</b>	<b>50 416</b>	<b>57 684</b>
<b>Import (1 000 MT)</b>						
Turkey	611	721	1 051	1 058	844	840
European Union	632	520	550	1 057	817	630
Other	1 396	1 322	1 445	1 451	1 297	1 410
<b>TOTAL</b>	<b>2 639</b>	<b>2 563</b>	<b>3 046</b>	<b>3 566</b>	<b>2 958</b>	<b>2 880</b>
<b>Export (1 000 MT)</b>						
Argentina	74	58	149	214	178	161
United States	99	89	87	64	73	63
Russia	362	103	338	1 278	528	270
Ukraine	261	50	119	76	186	220
Other	1 804	2 234	2 392	1 980	1 921	2 222
<b>TOTAL</b>	<b>2 600</b>	<b>2 534</b>	<b>3 085</b>	<b>3 612</b>	<b>2 886</b>	<b>2 936</b>
<b>Oilseed crushed</b>	<b>44 845</b>	<b>44 663</b>	<b>47 231</b>	<b>50 300</b>	<b>45 410</b>	<b>51 275</b>
<i>National Sunflower Association website <a href="http://www.sunflowermsa.com">www.sunflowermsa.com</a>, Table updated 12 January 2022; 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 utilised for sunflower production decreased by 4.5% to 477 800 ha, compared to the 500 300 ha of the previous season. This season's area planted is the lowest since the 2011/12 season. The national yield average decreased by 10% to 1.42 t/ha from the 1.58 t/ha of the previous season.

According to *The Bureau for Food and Agricultural Policy (BFAP) Baseline, Agricultural Outlook 2021 – 2030*, only 450 000 hectares are expected to remain under sunflower by 2030 under the current baseline conditions. Over the same period, yields are expected to improve by 29%, due largely to improvements in technology, continuous improvement of farming practices as well as removal of more marginal land from production. This improvement is sufficient to supply the growth in domestic demand.

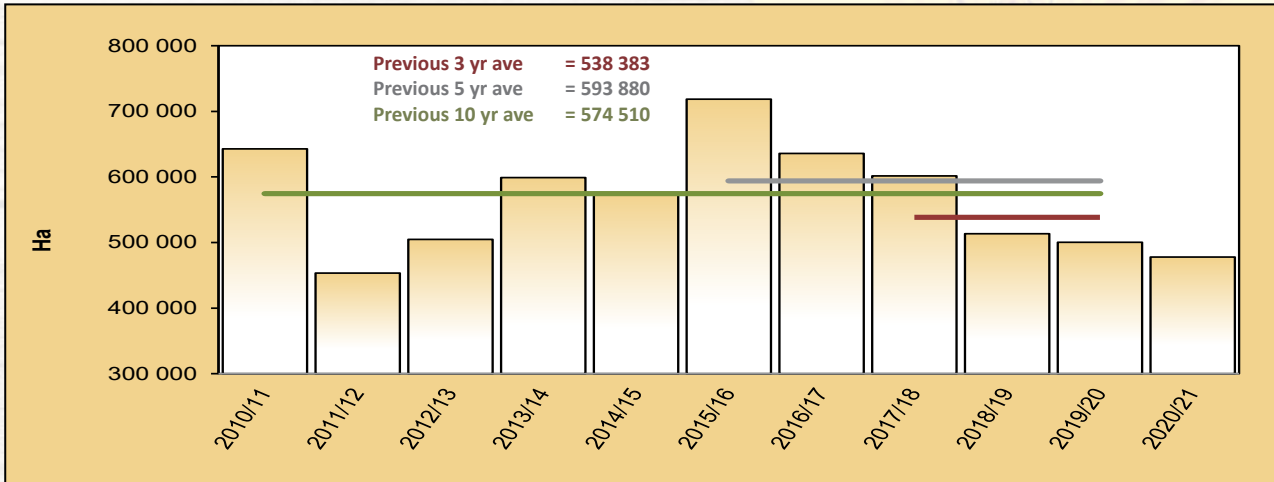
New technology on high-oil sunflower could improve the outlook for sunflower production as certain cultivars have the ability to produce oil contents as high as 50%, without any meaningful yield drag. One of the oilseed crushers has also introduced premiums for sunflower seed with oil contents exceeding 40%.

Please see Table 2 for an overview of sunflower production under dry land conditions versus irrigation in the 2020/21 season, compared to the 2019/20 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.

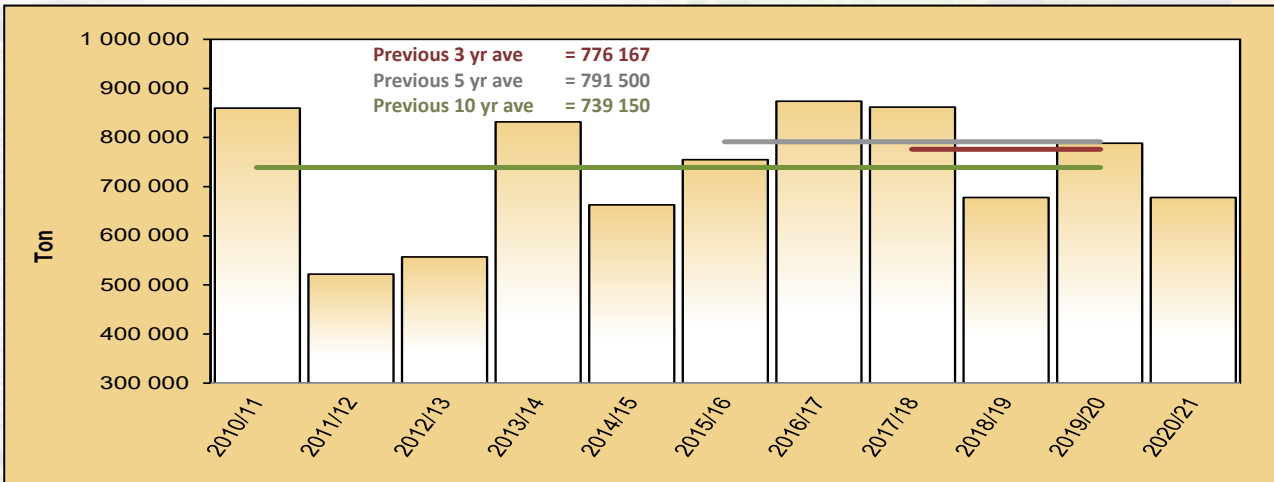
Table 2: Sunflower production overview over two seasons							
Province	Type of production	2020/21			2019/20		
		Hectares planted, ha	Production, tons	Yield, t/ha	Hectares planted, ha	Production, tons	Yield, t/ha
Western Cape	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
Northern Cape	Dryland	-	-	-	-	-	-
	Irrigation	1 100	1 320	1.20	1 200	1 430	1.19
	Total	1 100	1 320	1.20	1 200	1 430	1.19
Free State	Dryland	229 200	338 000	1.47	255 500	434 350	1.70
	Irrigation	5 800	14 500	2.50	4 500	10 250	2.28
	Total	235 000	352 500	1.50	260 000	444 600	1.71
Eastern Cape	Dryland	120	120	1.00	120	280	2.33
	Irrigation	180	330	1.83	180	470	2.61
	Total	300	450	1.50	300	750	2.50
KwaZulu-Natal	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
Mpumalanga	Dryland	3 500	5 250	1.50	2 555	3 475	1.36
	Irrigation	-	-	-	245	445	-
	Total	3 500	5 250	1.50	2 800	3 920	1.40
Limpopo	Dryland	73 500	70 800	0.96	64 000	62 800	0.98
	Irrigation	3 000	5 700	1.90	1 000	2 200	2.20
	Total	76 500	76 500	1.00	65 000	65 000	1.00
Gauteng	Dryland	4 400	5 720	1.30	3 750	5 100	1.36
	Irrigation	-	-	-	250	500	2.00
	Total	4 400	5 720	1.30	4 000	5 600	1.40
North West	Dryland	155 500	233 100	1.50	165 000	263 000	1.59
	Irrigation	1 500	3 160	2.11	2 000	4 200	2.10
	Total	157 000	236 260	1.50	167 000	267 200	1.60
RSA	Dryland	466 220	652 990	1.40	490 925	769 005	1.57
	Irrigation	11 580	25 010	2.16	9 375	19 495	2.08
	Total	477 800	678 000	1.42	500 300	788 500	1.58

Figures provided by the CEC.

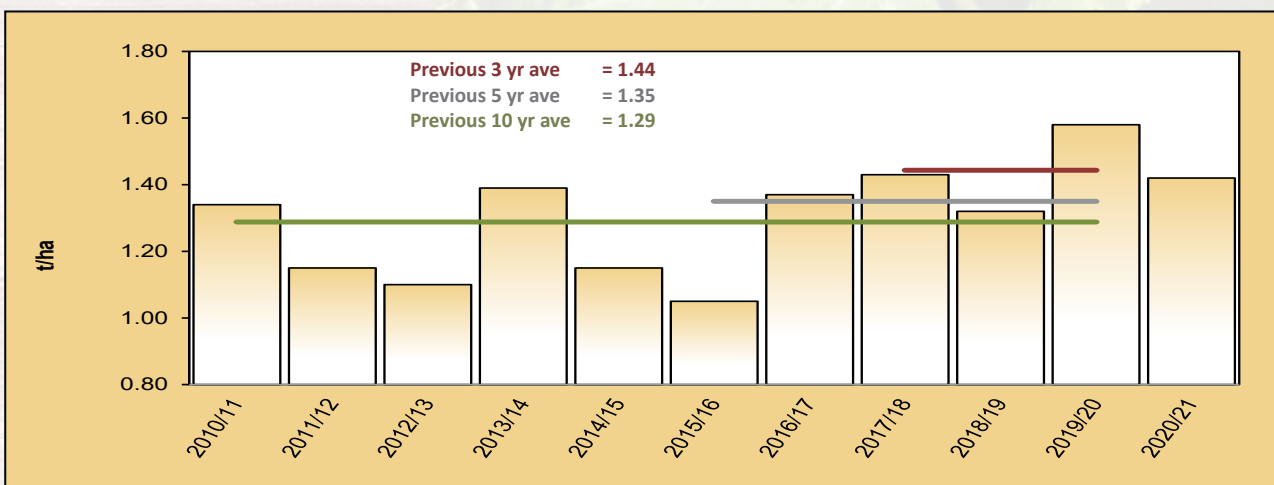
**Graph 2: Total RSA area utilised for sunflower production from 2010/11 to 2020/21**



**Graph 3: Sunflower production in RSA from 2010/11 to 2020/21**

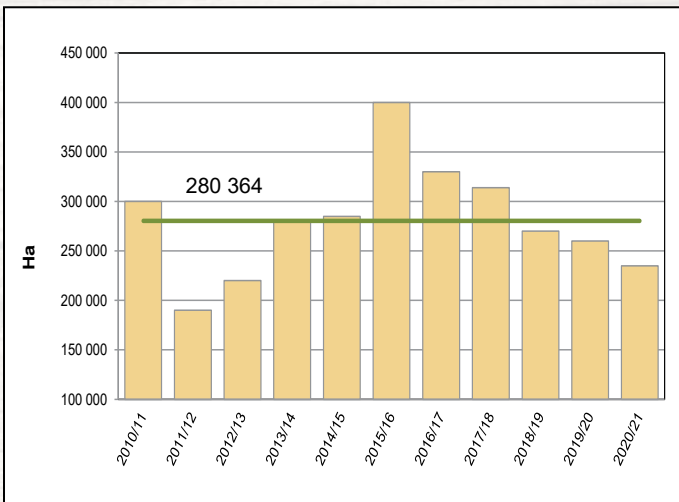


**Graph 4: RSA Sunflower yield from 2010/11 to 2020/21**

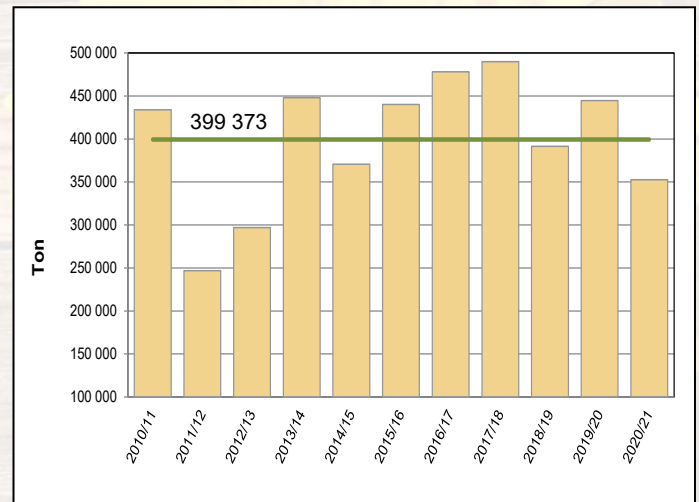


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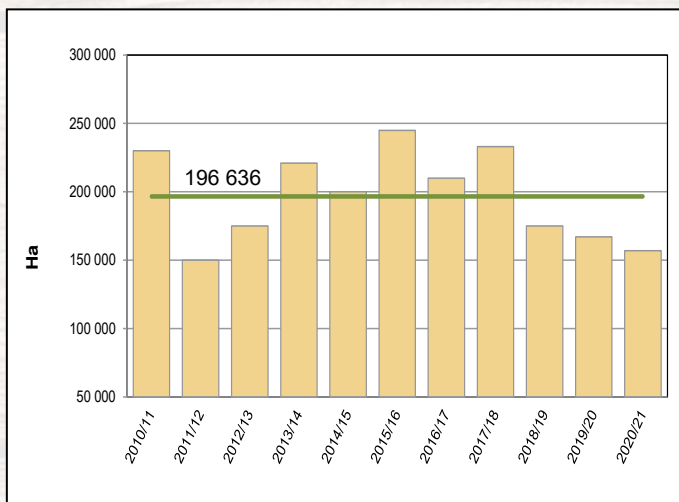
**Graph 5: Area utilised for sunflower production in the Free State since 2010/11**



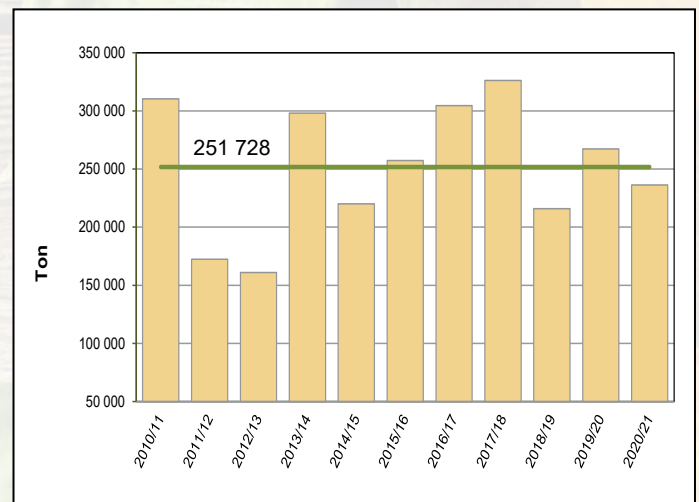
**Graph 6: Sunflower production in the Free State since 2010/11**



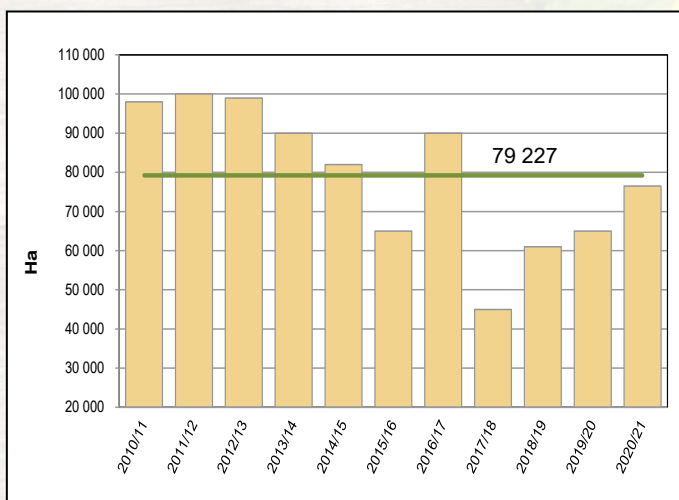
**Graph 7: Area utilised for sunflower production in North West since 2010/11**



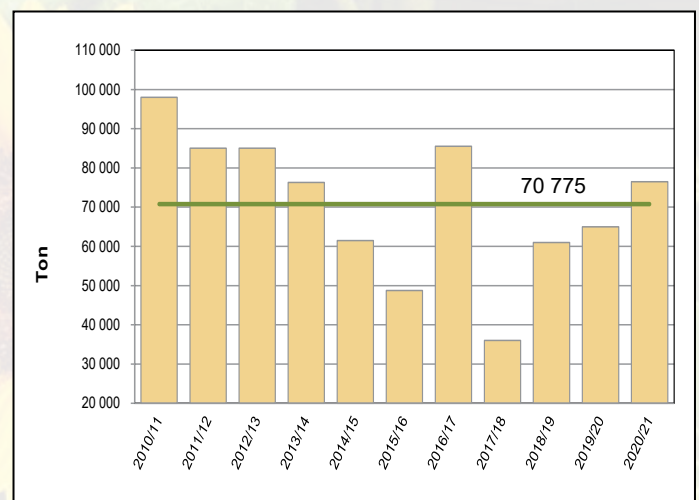
**Graph 8: Sunflower production in North West since 2010/11**



**Graph 9: Area utilised for sunflower production in Limpopo since 2010/11**



**Graph 10: Sunflower production in Limpopo since 2010/11**



Figures provided by the CEC.

— Eleven season average