

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 2019/20 season conducted by the ARC-Grain Crops in collaboration with Agricol, Pannar, Pioneer, Syngenta, Sensako and Link Seed 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 2019/20 season stands at 55.9 million metric tons with the Ukraine and Russia contributing 57% to this total. An area of 27.4 million hectares were harvested resulting in a yield of 2.04 metric tons/hectare. The forecasted figure for the 2020/21 season is 50.5 million metric tons harvested on 28.2 million hectares and with a yield of 1.79 metric tons/hectare.

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

Table 1: World Sunflower Seed Supply and Disappearance (October through September)						
Season	2015/16	2016/17	2017/18	2018/19	2019/20 (Revised)	2020/21 (Forecast)
Area Harvested (1 000 Ha)	25 242	26 964	26 885	27 265	27 440	28 226
Yield (MT/Ha)	1.70	1.86	1.83	1.91	2.04	1.79
Production (1 000 MT)						
Argentina	2 830	3 300	3 400	3 530	3 150	2 830
European Union	7 769	8 641	10 058	9 482	9 485	8 696
China	2 698	2 750	2 580	2 550	2 680	2 730
Russia	9 700	11 600	11 000	12 756	15 379	13 200
Ukraine	12 100	15 100	13 400	15 250	16 500	14 300
United States	1 326	1 203	970	956	887	1 353
South Africa	755	874	862	678	786	780
Turkey	1 350	1 470	1 700	1 530	1 700	1 550
Other	4 386	5 130	5 086	5 292	5 346	5 020
TOTAL	42 914	50 068	49 056	52 024	55 913	50 459
Import (1 000 MT)						
Turkey	436	611	721	1 051	1 058	950
European Union	577	632	520	550	1 036	880
Other	1 100	1 396	1 322	1 445	1 401	730
TOTAL	2 113	2 639	2 563	3 046	3 495	2 560
Export (1 000 MT)						
Argentina	302	74	58	149	214	170
United States	107	99	89	87	64	80
Russia	105	362	103	338	1 261	500
Ukraine	171	261	50	119	76	180
Other	1 467	1 804	2 234	2 392	1 911	1 617
TOTAL	2 152	2 600	2 534	3 085	3 526	2 547
Oilseed crushed	38 177	44 845	44 663	47 231	50 474	45 499
<i>National Sunflower Association website www.sunflowernsa.com, Table updated January 12, 2021; Source: Oil World & 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 2.9% to 500 300 ha, compared to the 515 350 ha of the previous season. This season's area planted is the lowest since the 2011/12 season. The national yield average increased by almost 20% to 1.58 t/ha, this is the highest national average yield reported since the early 1980's.

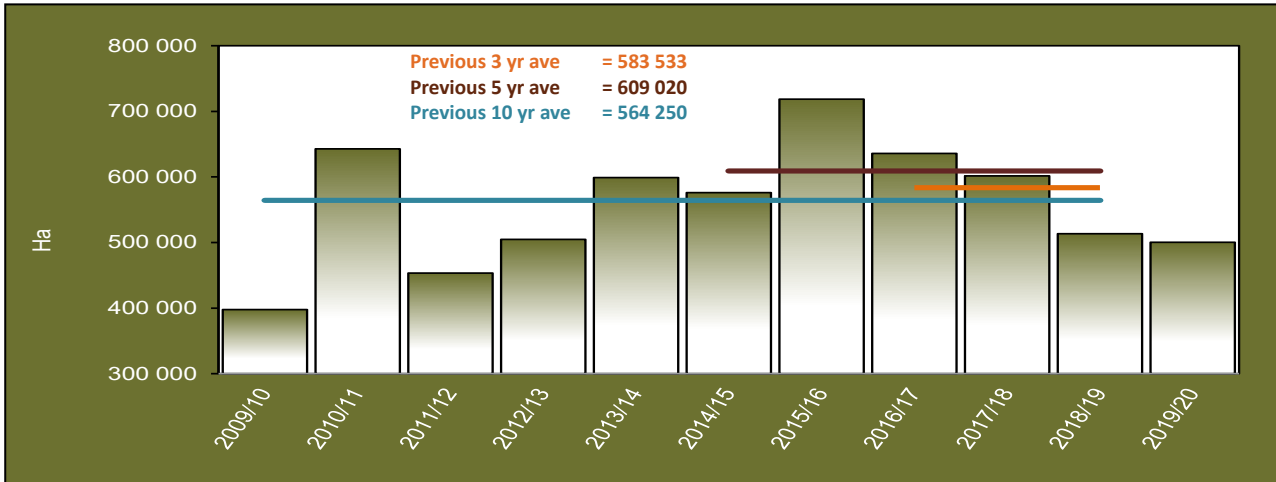
According to *The Bureau for Food and Agricultural Policy (BFAP) Baseline, Agricultural Outlook 2020 – 2029*, sunflower area trends largely sideways over the next decade, reaching 590 000 hectares by 2029. Over the same period, yields are expected to increase by 21%, due largely to improvements in technology and continuous improvement of farming practices. This yield increase is sufficient to supply the growth in domestic demand.

Please see Table 2 for an overview of sunflower production under dry land conditions versus irrigation in the 2019/20 season, compared to the 2018/19 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.

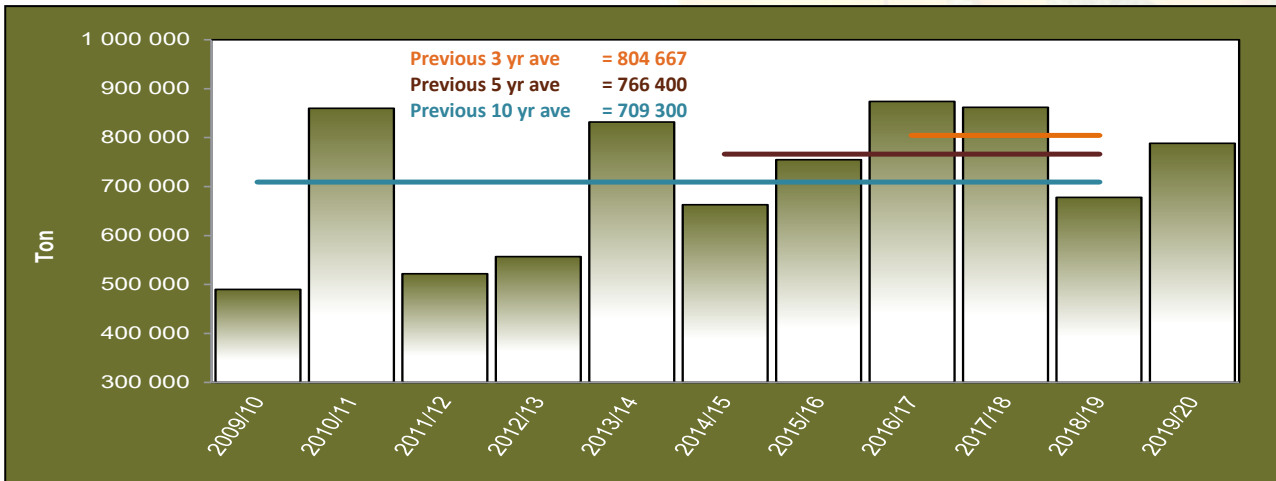
Table 2: Sunflower production overview over two seasons							
Province	Type of production	2019/20			2018/19		
		Hectares planted, ha	Production, tons	Yield, t/ha	Hectares planted, ha	Production, tons	Yield, t/ha
Western Cape	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
Northern Cape	Dryland	-	-	-	-	-	-
	Irrigation	1 200	1 430	1.19	950	1 140	1.20
	Total	1 200	1 430	1.19	950	1 140	1.20
Free State	Dryland	255 500	434 350	1.70	265 500	382 050	1.44
	Irrigation	4 500	10 250	2.28	4 500	9 450	2.10
	Total	260 000	444 600	1.71	270 000	391 500	1.45
Eastern Cape	Dryland	120	280	2.33	100	260	2.60
	Irrigation	180	470	2.61	-	-	-
	Total	300	750	2.50	100	260	2.60
KwaZulu-Natal	Dryland	-	-	-	-	-	-
	Irrigation	-	-	-	-	-	-
	Total	-	-	-	-	-	-
Mpumalanga	Dryland	2 555	3 475	1.36	4 500	4 500	1.00
	Irrigation	245	445	-	-	-	-
	Total	2 800	3 920	1.40	4 500	4 500	1.00
Limpopo	Dryland	64 000	62 800	0.98	60 000	58 800	0.98
	Irrigation	1 000	2 200	2.20	1 000	2 200	2.20
	Total	65 000	65 000	1.00	61 000	61 000	1.00
Gauteng	Dryland	3 750	5 100	1.36	3 550	3 300	0.93
	Irrigation	250	500	2.00	250	500	2.00
	Total	4 000	5 600	1.40	3 800	3 800	1.00
North West	Dryland	165 000	263 000	1.59	174 100	214 000	1.23
	Irrigation	2 000	4 200	2.10	900	1 800	2.00
	Total	167 000	267 200	1.60	175 000	215 800	1.23
RSA	Dryland	490 925	769 005	1.57	507 750	662 910	1.31
	Irrigation	9 375	19 495	2.08	7 600	15 090	1.99
	Total	500 300	788 500	1.58	515 350	678 000	1.32

Figures provided by the CEC.

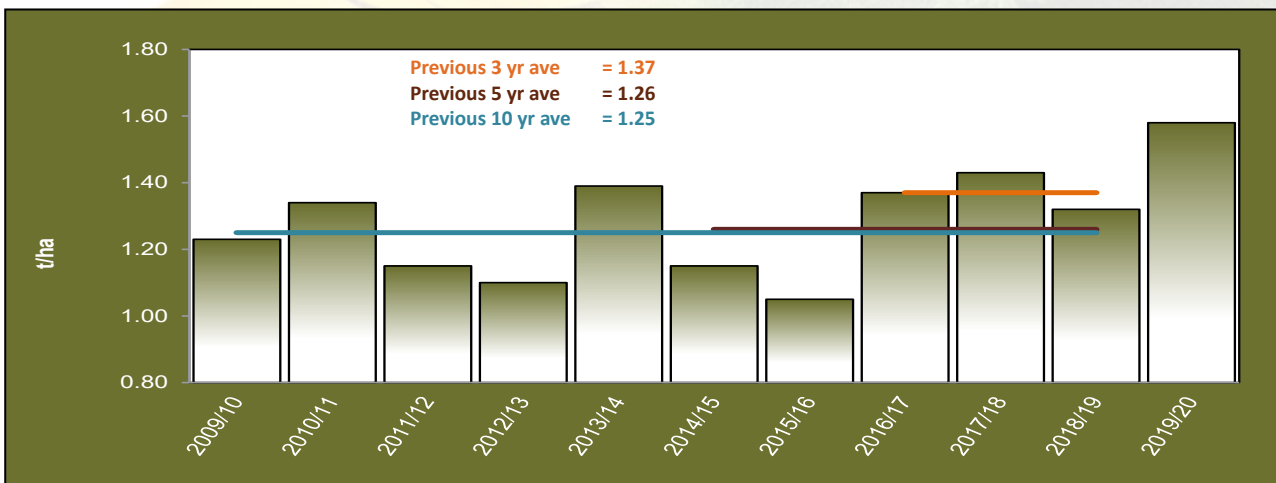
Graph 2: Total RSA area utilised for sunflower production from 2009/10 to 2019/20



Graph 3: Sunflower production in RSA from 2009/10 to 2019/20

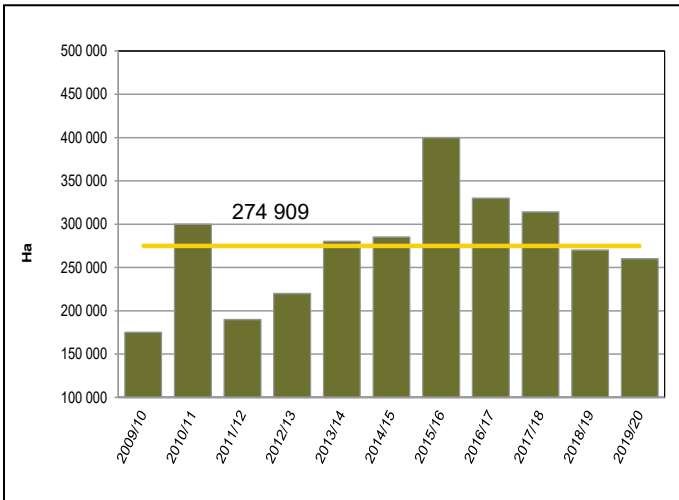


Graph 4: RSA Sunflower yield from 2009/10 to 2019/20

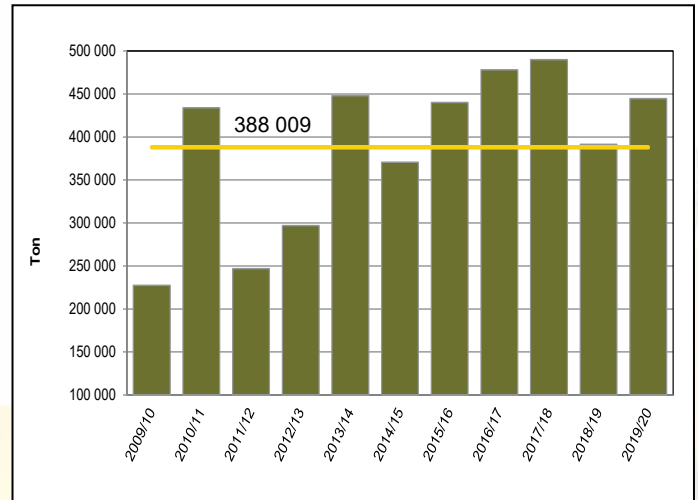


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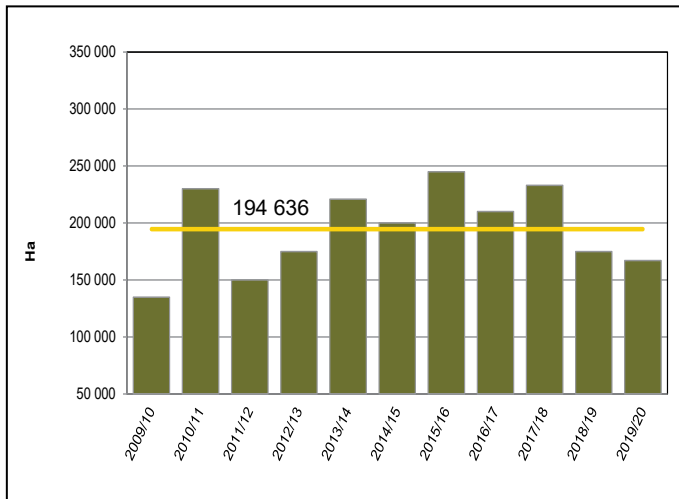
Graph 5: Area utilised for sunflower production in the Free State since 2009/10



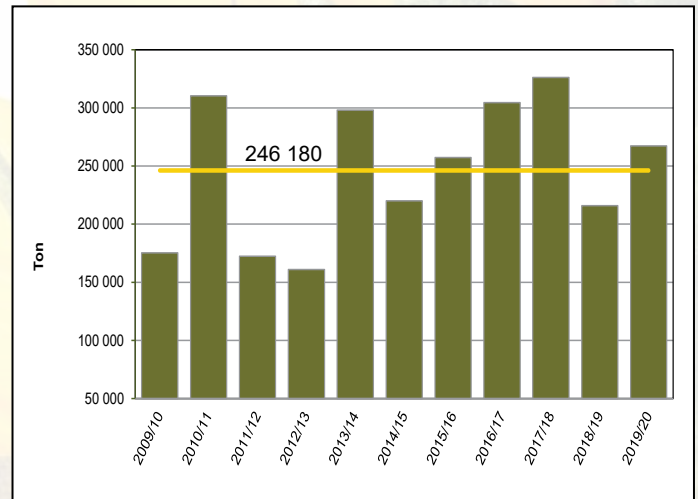
Graph 6: Sunflower production in the Free State since 2009/10



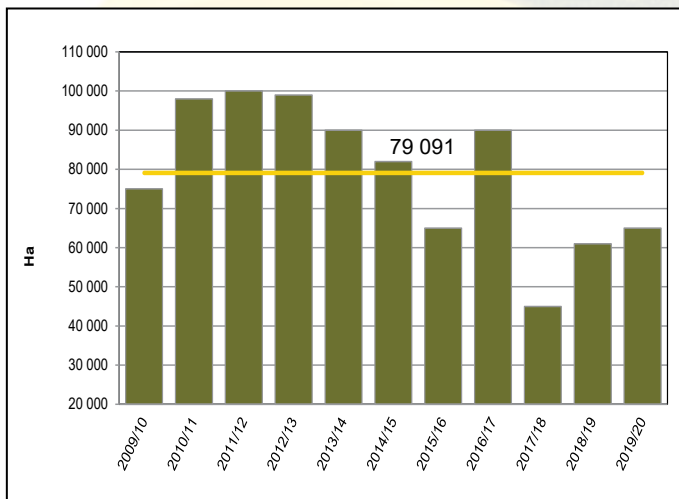
Graph 7: Area utilised for sunflower production in North West since 2009/10



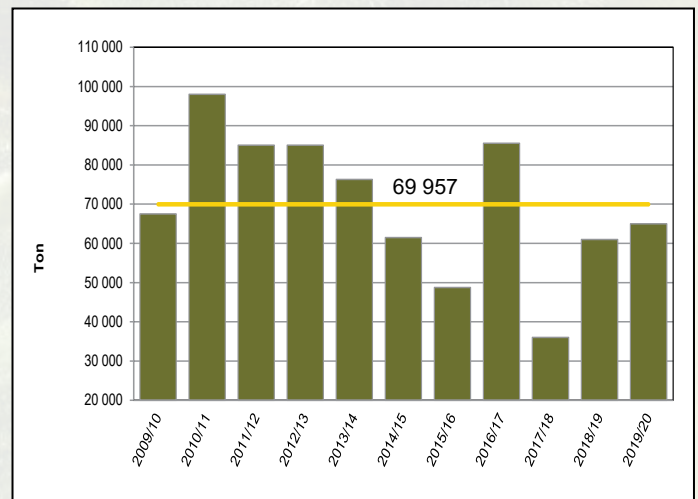
Graph 8: Sunflower production in North West since 2009/10



Graph 9: Area utilised for sunflower production in Limpopo since 2009/10



Graph 10: Sunflower production in Limpopo since 2009/10



Figures provided by the CEC.

— Eleven season average