

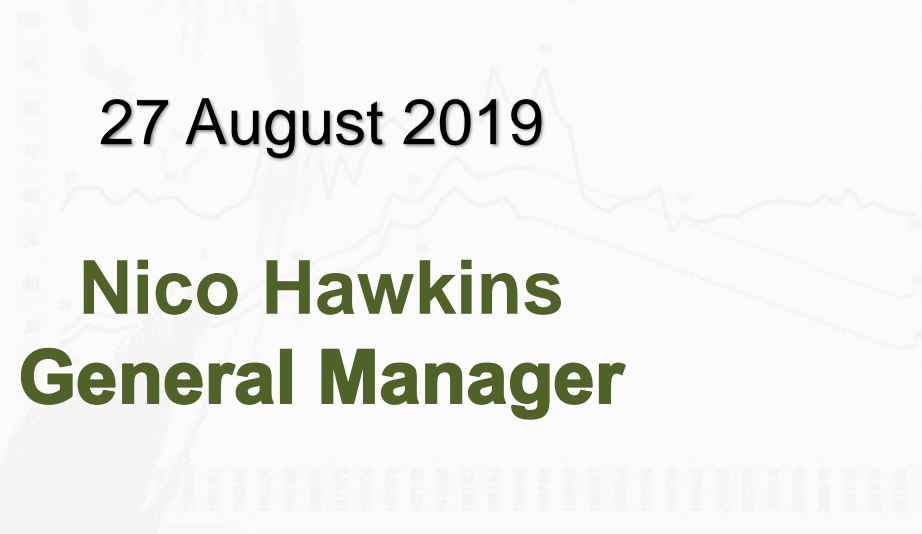
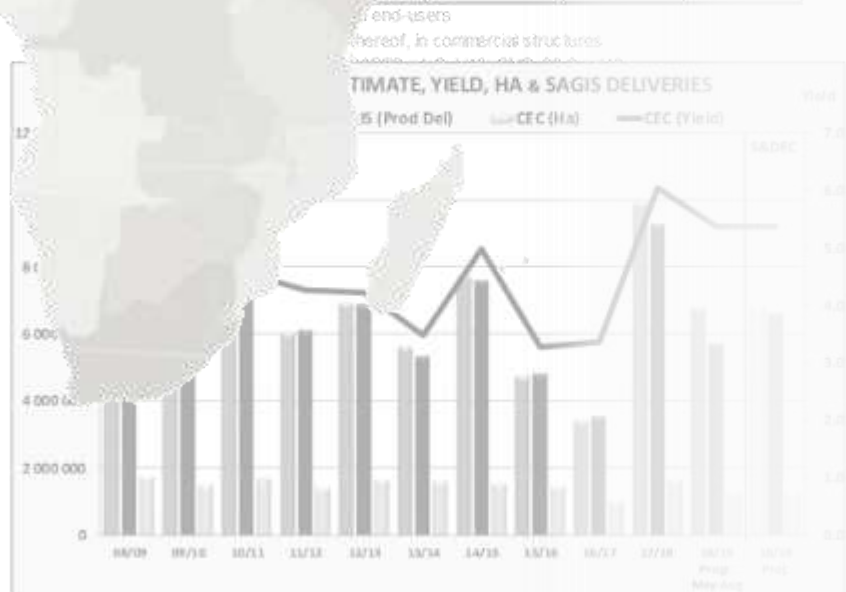


# South African Grain Information Service Overview

27 August 2019

**Nico Hawkins**  
**General Manager**

Year	Area	Inter: Sep
2017/18	Estimate	2017/18
2018/19	Estimate	2018/19
2019/20	Estimate	2019/20
2020/21	Estimate	2020/21
2021/22	Estimate	2021/22
2022/23	Estimate	2022/23
2023/24	Estimate	2023/24
2024/25	Estimate	2024/25
2025/26	Estimate	2025/26
2026/27	Estimate	2026/27
2027/28	Estimate	2027/28
2028/29	Estimate	2028/29
2029/30	Estimate	2029/30
2030/31	Estimate	2030/31
2031/32	Estimate	2031/32
2032/33	Estimate	2032/33
2033/34	Estimate	2033/34
2034/35	Estimate	2034/35
2035/36	Estimate	2035/36
2036/37	Estimate	2036/37
2037/38	Estimate	2037/38
2038/39	Estimate	2038/39
2039/40	Estimate	2039/40
2040/41	Estimate	2040/41
2041/42	Estimate	2041/42
2042/43	Estimate	2042/43
2043/44	Estimate	2043/44
2044/45	Estimate	2044/45
2045/46	Estimate	2045/46
2046/47	Estimate	2046/47
2047/48	Estimate	2047/48
2048/49	Estimate	2048/49
2049/50	Estimate	2049/50
2050/51	Estimate	2050/51
2051/52	Estimate	2051/52
2052/53	Estimate	2052/53
2053/54	Estimate	2053/54
2054/55	Estimate	2054/55
2055/56	Estimate	2055/56
2056/57	Estimate	2056/57
2057/58	Estimate	2057/58
2058/59	Estimate	2058/59
2059/60	Estimate	2059/60
2060/61	Estimate	2060/61
2061/62	Estimate	2061/62
2062/63	Estimate	2062/63
2063/64	Estimate	2063/64
2064/65	Estimate	2064/65
2065/66	Estimate	2065/66
2066/67	Estimate	2066/67
2067/68	Estimate	2067/68
2068/69	Estimate	2068/69
2069/70	Estimate	2069/70
2070/71	Estimate	2070/71
2071/72	Estimate	2071/72
2072/73	Estimate	2072/73
2073/74	Estimate	2073/74
2074/75	Estimate	2074/75
2075/76	Estimate	2075/76
2076/77	Estimate	2076/77
2077/78	Estimate	2077/78
2078/79	Estimate	2078/79
2079/80	Estimate	2079/80
2080/81	Estimate	2080/81
2081/82	Estimate	2081/82
2082/83	Estimate	2082/83
2083/84	Estimate	2083/84
2084/85	Estimate	2084/85
2085/86	Estimate	2085/86
2086/87	Estimate	2086/87
2087/88	Estimate	2087/88
2088/89	Estimate	2088/89
2089/90	Estimate	2089/90
2090/91	Estimate	2090/91
2091/92	Estimate	2091/92
2092/93	Estimate	2092/93
2093/94	Estimate	2093/94
2094/95	Estimate	2094/95
2095/96	Estimate	2095/96
2096/97	Estimate	2096/97
2097/98	Estimate	2097/98
2098/99	Estimate	2098/99
2099/00	Estimate	2099/00
2100/01	Estimate	2100/01



# Index

- SAGIS Overview
- Role in the information chain
- Data released / dissemination
- Canola current situation
- General





**“Big brother is watching  
you...”**



Guidelines on the  
Exchange of Information  
between Competitors  
under the Competition  
Act

*- George Orwell 1984*

*- 14 July 2017*



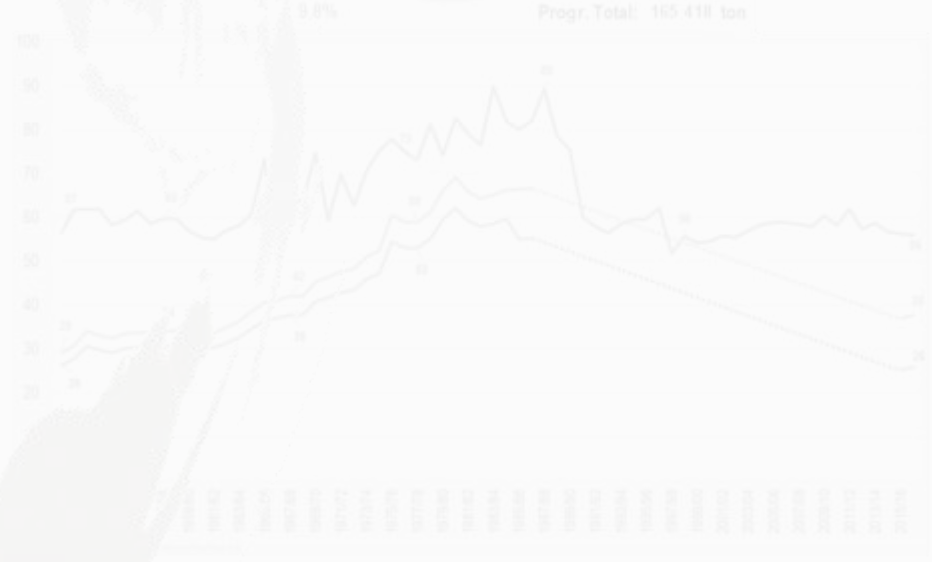
Year	Net AC	Inter	Sep
2017/18	2 428.7	Estimate	2017/18
2018/19	2 428.7	Estimate	2018/19
	301.6	Not available	Not available
	0.0	Not available	Not available
	6 874.0 (b)		
	565.0		
	1 678.8 (b)		



# SAGIS overview

of end-users  
thereof, in commercial structures

TIMATE, YIELD, HA & SAGIS DELIVERIES



# Deregulation

- Marketing of Agri. Products Act, 1996 – end to single channel marketing & control boards.
- Importance of reliable info for the functioning of a free market was realised.
- Non Profit Company - registered in November 1997

# Industries

- Four industries created SAGIS (re-presented by their various Trusts):
  - The Maize Trust
  - Oil and Protein Seeds Development Trust
  - The Sorghum Trust
  - Winter Cereal Trust
- SAGIS is also funded by these trusts



# SAGIS' main objective (function)

## Main Objective

The collation, processing, analysing and timeous distribution to all role-players, of reliable and useful market information related to grain and oilseeds.



# Statutory Measures (SM)

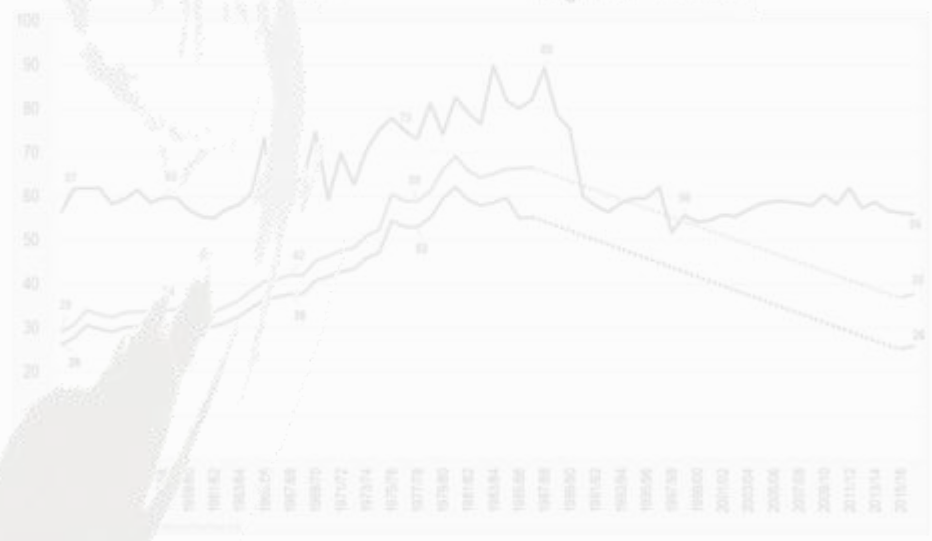
- Government announced SM – compulsory for market participants (*co-workers*) e.g. storers, processors, importers & exporters to register & submit information.
- Non adherence is an offence & can lead to prosecution.
- SAGIS fulfil its statutory obligations & liaises with certain Government departments to obtain market information **BUT** it operates independently from Government as far as its main goals are concerned.
- No incentives to co-workers. They do get reliable and cost free information and confidentiality.





Year	Area	Inter.	Area
2017/18	2 428.7	Estimate	2017/18
2018/19	2 501.6	Not available	Not available
2019/20	2 687.0 (b)	Not available	Not available
2020/21	2 565.0	Not available	Not available
2021/22	1 678.8 (b)	Not available	Not available

# Who supply info



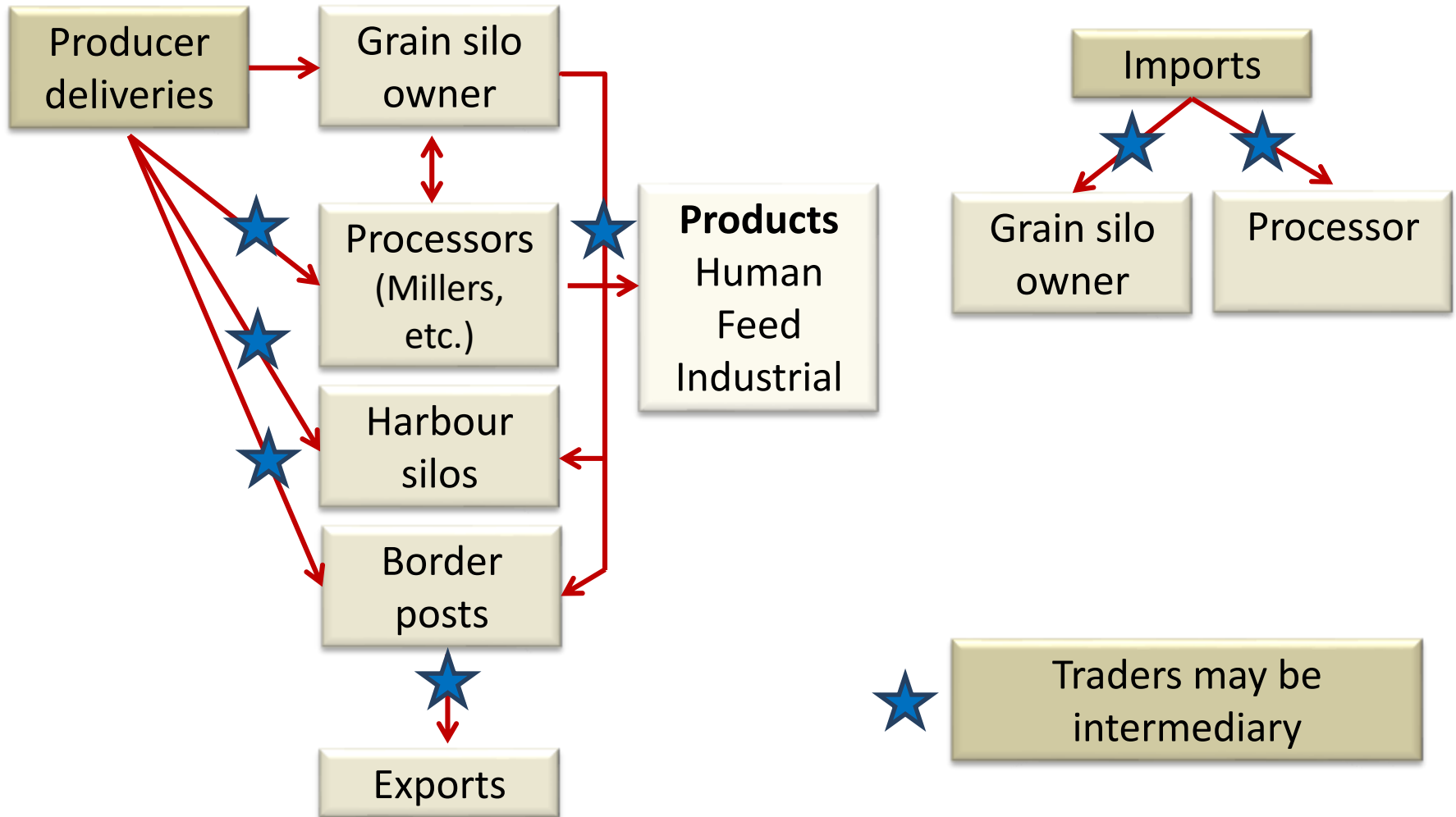
# Compulsory Info Suppliers (Statutory compelled)

- Commercial grain silo owners
- Harbour silo owners
- Traders with premises
- Importers / Exporters
- Processors
- End consumers
- Producers acting as any of the above

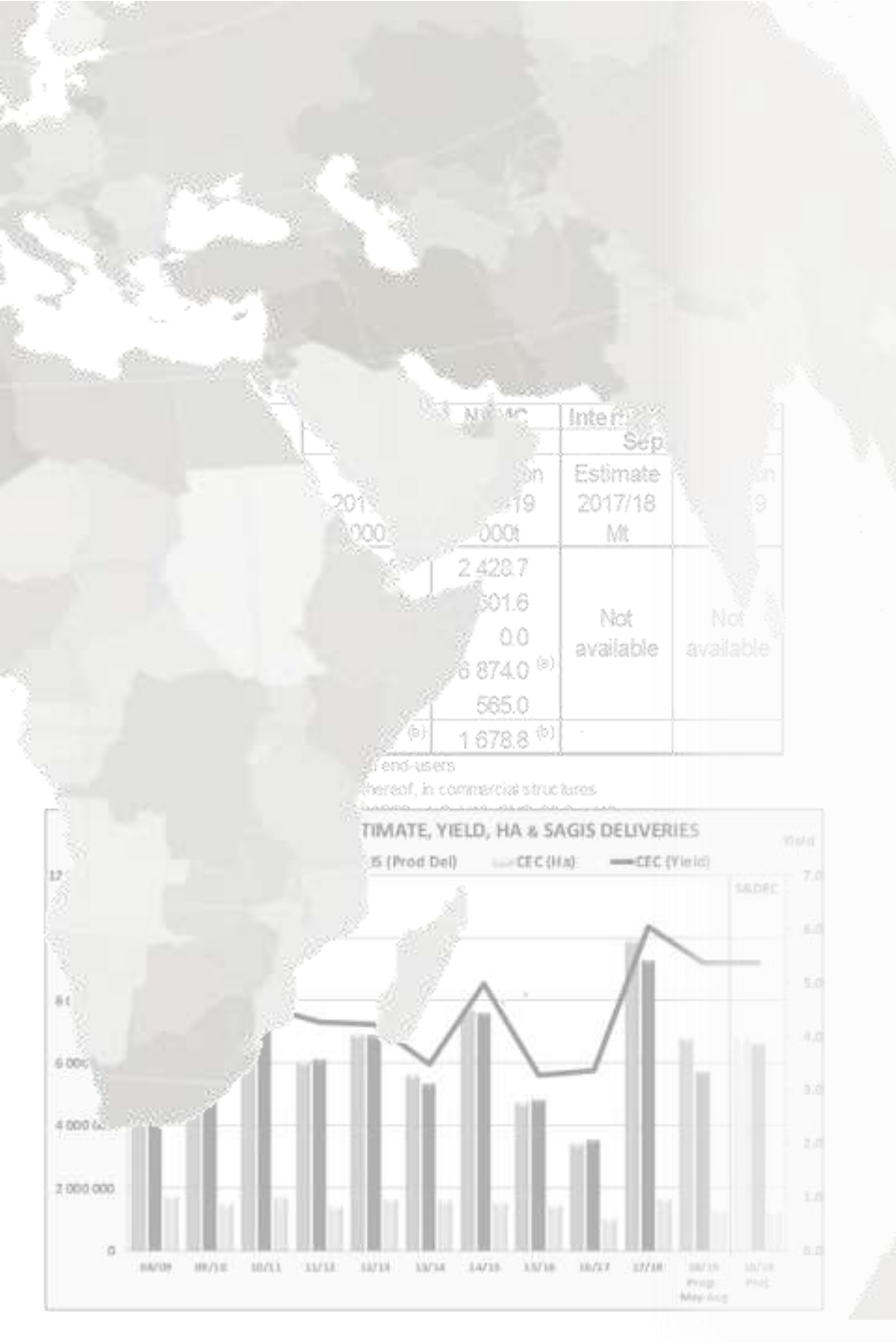
# Voluntary Info Suppliers

- Traders without premises
- Spoornet
- Portnet

# Principle: Grain flow

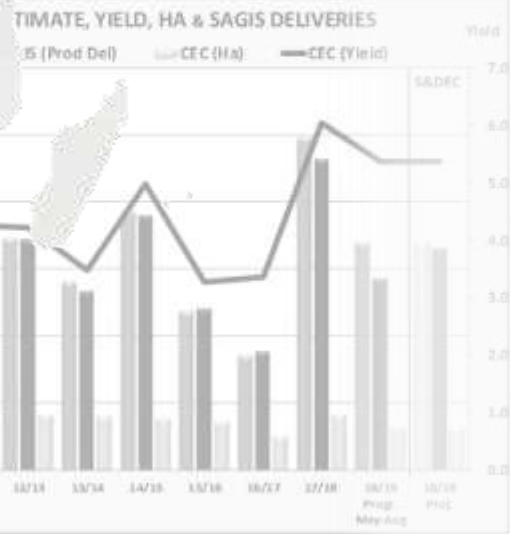


Consigner and recipient rapport – SAGIS verify and reconcile each transaction

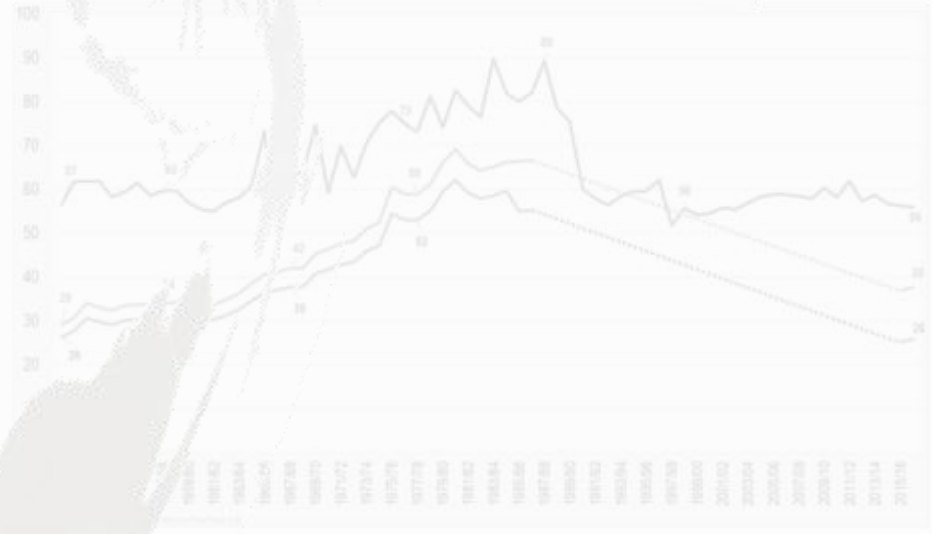


Year	Production (000t)	Inter: Sep	Estimate 2017/18 (Mt)	2018/19
2017/18	2 428.7	Estimate	2 428.7	2 428.7
2018/19	2 501.6	Not available	Not available	Not available
2019/20	2 687.0 (b)	Not available	Not available	Not available
2020/21	2 565.0	Not available	Not available	Not available
2021/22	1 678.8 (b)	Not available	Not available	Not available

of end-users  
thereof, in commercial structures



# Inspection



# Inspection

- The **Minister** may **appoint** a person as an **inspector** to exercise the powers and perform the duties.
- An inspector shall be furnished with a certificate, signed by or on behalf of the Minister and bearing a declaration that the bearer is an inspector in terms of this Act.

REPUBLIC OF SOUTH AFRICA  
REPUBLIEK VAN SUID-AFRIKA

# Inspection

An inspector may:

- at any reasonable time, enter premises where he or she has reason to believe that a statutory measure or any prohibition, control or direction referred to in this Act has been or is being contravened,
- investigate and obtain evidence,
- inspect any book, record or other document and make copies thereof or,
- deliver any book, record or other document that pertains to the investigation, and
- make excerpts from it

# Purpose of inspection

Give management reasonable assurance that:

- risks associated with relevant business activities are fully identified
- existing controls are sufficient to provide the identified risks
- the main and strategic objectives will be effectively and economically reached.

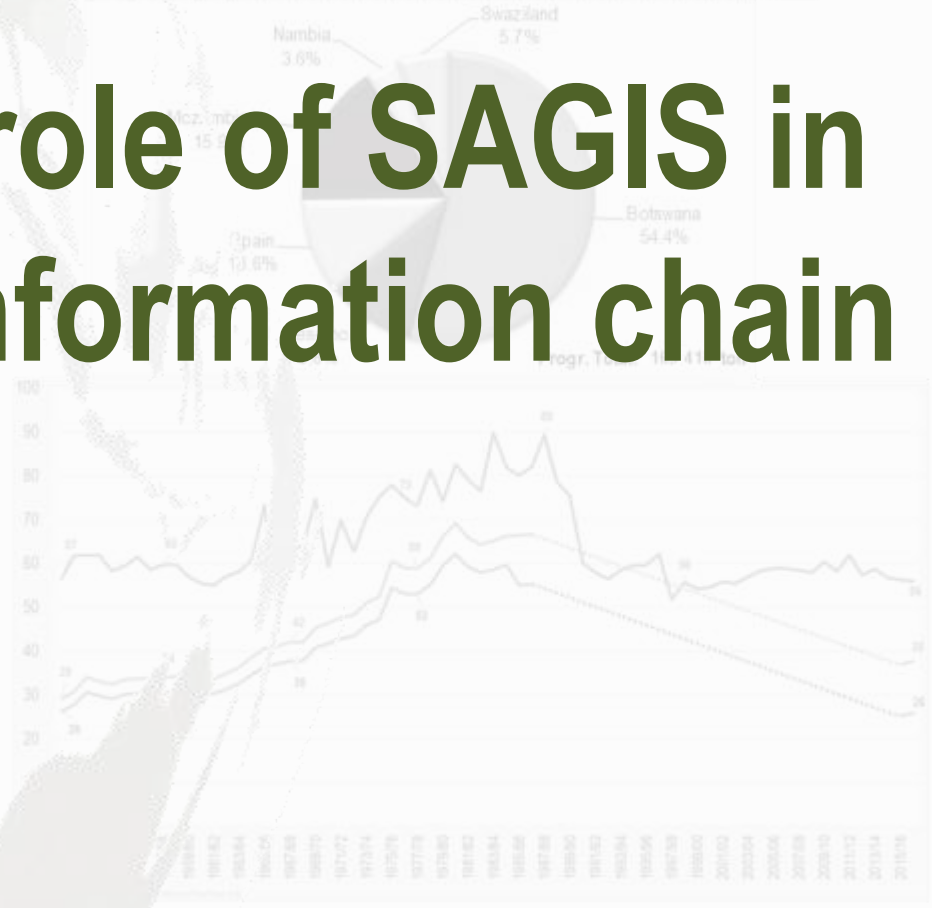




Year	Production (000 Mt)	Imports (000 Mt)	Inter: Sep
2017/18	2 428.7	601.6	Estimate 2017/18
2018/19	2 874.0 (b)	565.0	Not available
2019/20	1 678.8 (b)	Not available	Not available



# The role of SAGIS in the Information chain





**We can't predict the  
future, but...**

**We can give you  
facts.**

[www.sagis.org.za](http://www.sagis.org.za)

# Importance of information

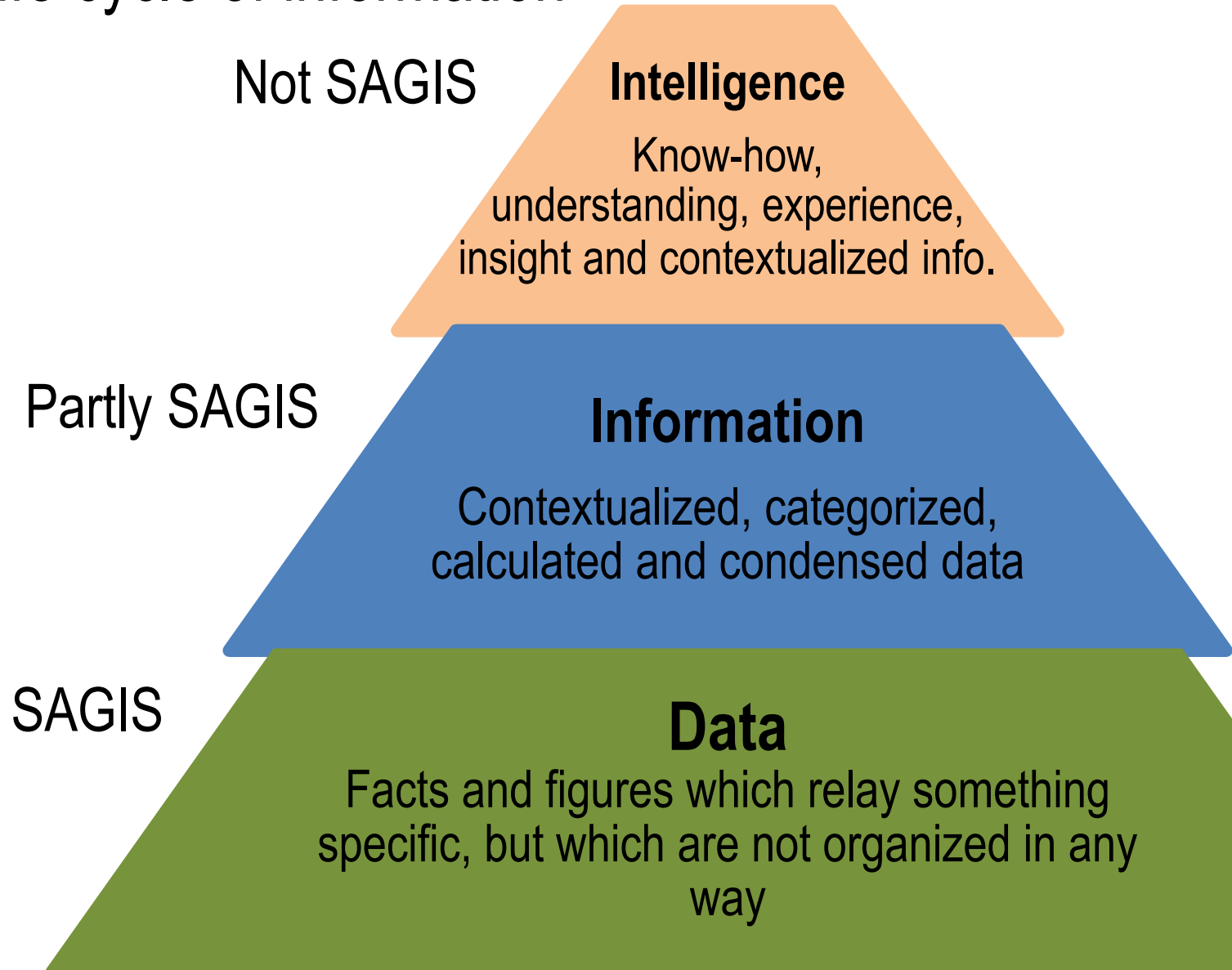
- Free market
- Business decisions
- Policy decisions

THE MOST IMPORTANT  
SINGLE CENTRAL FACT ABOUT  
**A FREE MARKET**  
IS THAT NO EXCHANGE TAKES PLACE  
UNLESS BOTH PARTIES BENEFIT.



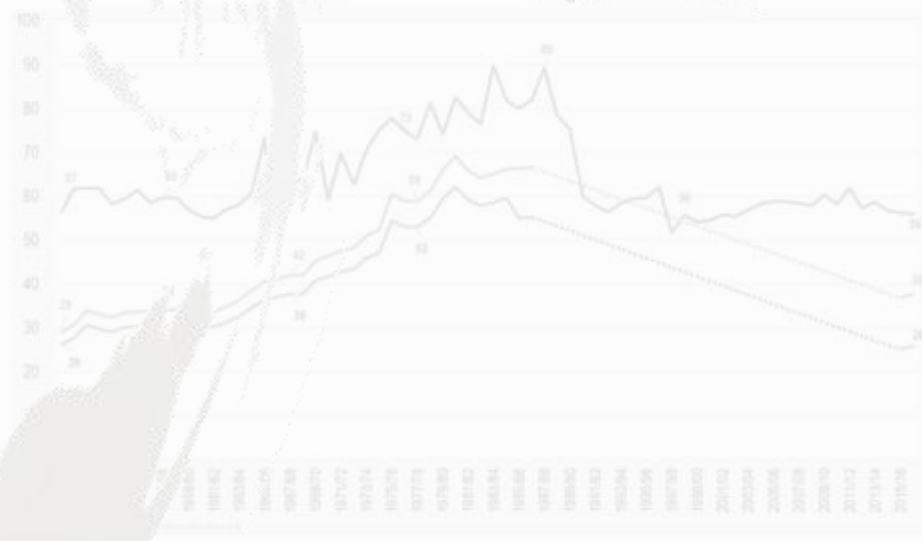
# Outputs from SAGIS - Analysis

Life cycle of information



# Data released / Dissemination of data

Year	Production (000t)	Inter: Estimate 2017/18 (Mt)	2018/19
2017/18	2 428.7	Estimate 2017/18	1 9
2018/19	3 016.0	Not available	Not available
2019/20	3 874.0 (b)	Not available	Not available
2020/21	565.0		
2021/22	1 678.8 (b)		



## Raw Materials

- Barley
- **Canola**
- Groundnuts
- Maize
- Oats
- Sorghum
- Soybeans
- Sunflower
- Wheat

- Stocks (Opening & Closing)
- Imports & Exports
- Prod. Deliveries in commercial structures
- Processed


## Products

- Summer grains
- Winter cereal
- Oilseeds

- Manufactured
- Imports
- Exports

# SAGIS: Monthly Data – Raw grain & oilseeds



	CANOLA					SMD-072019
	Monthly announcement of data/Maandelikse bekendmaking van data(1)					
	2018/19 Year (Oct - Sep) / 2018/19 Jaar (Okt - Sep) (2)					
	ton					2019-07-25
May/Mei 2019	Jun 2019 Preliminary/Voorlopig	Progressive/Progressief Oct/Okt 2018 - Jun 2019	% +/(3)	Progressive/Progressief Oct/Okt 2017 - Jun 2018		
<b>(a) Opening Stock</b>	1 May/Mei 2019	1 Jun 2019	1 Oct/Okt 2018		1 Oct/Okt 2017	<b>(a) Beginvoorraad</b>
	52 963	47 733	6 527	-69.4	21 350	
	Prog. Oct/Okt 2018 - Jun 2019		Prog. Oct/Okt 2017 - Jun 2018			
<b>(b) Acquisition</b>	20	1	104 079	12.3	92 696	<b>(b) Verkryging</b>
Deliveries directly from farms	20	1	104 079	12.3	92 696	Lewerings direk vanaf plase
Imports destined for RSA	0	0	0	0	0	Invoere bestem vir RSA
<b>(c) Utilisation</b>	5 268	9 840	73 532	-8.7	80 517	<b>(c) Aanwending</b>
Processed for commercial use:	5 266	9 839	73 514	-8.7	80 495	Verwerk vir kommersiële gebruik:
Animal feed (i)	310	226	2 875	10.7	2 597	Dierevoer (i)
Oil and oilcake (ii)	4 956	9 613	70 639	-9.3	77 898	Olie en oliekoek (ii)
Withdrawn by producers	0	0	0	0	0	Onttrek deur produsente
Released to end-consumer(s)	2	1	18	-18.2	22	Vrygestel aan eindverbruiker(s)
Seed for planting purposes	0	0	0	0	0	Saad vir plantdoeleindes
<b>(d) RSA Exports (5)</b>						<b>(d) RSA Uitvoere (5)</b>
Whole Canola	0	0	0	0	0	Heelcanola
Border posts	0	0	0	0	0	Grensposte
Harbours	0	0	0	0	0	Hawens
<b>(e) Sundries</b>	-18	-10	-830		-742	<b>(e) Diverse</b>
Net dispatches(+)/Receipts(-)	0	1	-3		0	Netto versendings(+)/Ontvangstes(-)
Surplus(-)/Deficit(+)	-18	-11	-827		-742	Surplus(-)/Tekort(+)
<b>(f) Unutilised stock (a+b-c-d-e)</b>	31 May/Mei 2019	30 Jun 2019	30 Jun 2019		30 Jun 2018	<b>(f) Onaangewende voorraad (a+b-c-d-e)</b>
	47 733	37 904	37 904	10.6	34 271	
<b>(g) Stock stored at:(6)</b>	47 733	37 904	37 904	10.6	34 271	<b>(g) Voorraad geberg by:(6)</b>
Storers and Traders	23 828	21 553	21 553	3.5	20 824	Opbergers en handelaars
Processors	23 905	16 351	16 351	21.6	13 447	Verwerkers
<p>Excluding canola crushed for oilcake. (i) Uitgesluit canola gepers vir oliekoek.</p> <p>Oil mainly for human consumption. Oilcake mainly for animal feed. (ii) Olie hoofsaaklik vir menslike verbruik. Oliekoek hoofsaaklik vir dierevoer.</p> <p>Also refer to general footnotes. Verwys ook na algemene voetnotas.</p>						

# SAGIS: Monthly Data since 1997/98



## – Raw grain & oilseeds

	Oct 1998	Nov 1998	Dec 1998		Jan 2019	Feb 2019	Mar 2019	Apr 2019	Mei 2019	Jun 2019
<b>SUPPLY</b>										
<b>Opening Stock</b>	<b>139</b>	<b>9 594</b>	<b>13 461</b>		<b>86 148</b>	<b>77 049</b>	<b>70 110</b>	<b>62 338</b>	<b>52 963</b>	<b>47 733</b>
Producer deliveries	10 044	7 100	1 946		273	19	148	6	20	1
Imports	0	0	0		0	0	0	0	0	0
Surplus	0	0	0		0	0	1	0	18	11
<b>Total Supply</b>	<b>10 183</b>	<b>16 694</b>	<b>15 407</b>		<b>86 421</b>	<b>77 068</b>	<b>70 259</b>	<b>62 344</b>	<b>53 001</b>	<b>47 745</b>
<b>DEMAND</b>										
Processed	589	3 233	2 739		9 366	6 957	7 920	9 376	5 266	9 839
-animal	0	0	0		597	335	217	203	310	226
-crushed oil & cake	589	3 233	2 739		8 769	6 622	7 703	9 173	4 956	9 613
Withdrawn by producers	0	0	0		0	0	0	0	0	0
Released to end-consumers	0	0	0		3	1	1	3	2	1
Seed for planting purposes	0	0	0		0	0	0	0	0	0
Net receipts(-)/disp(+)	0	0	0		0	0	0	0	0	1
<b>Deficit</b>	<b>0</b>	<b>0</b>	<b>0</b>		<b>3</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>
<b>Local Demand</b>	<b>589</b>	<b>3 233</b>	<b>2 739</b>		<b>9 372</b>	<b>6 958</b>	<b>7 921</b>	<b>9 381</b>	<b>5 268</b>	<b>9 841</b>
<b>Exports</b>	<b>0</b>	<b>0</b>	<b>0</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Whole canola	0	0	0		0	0	0	0	0	0
Border posts	0	0	0		0	0	0	0	0	0
Harbours	0	0	0		0	0	0	0	0	0
<b>Total Demand</b>	<b>589</b>	<b>3 233</b>	<b>2 739</b>		<b>9 372</b>	<b>6 958</b>	<b>7 921</b>	<b>9 381</b>	<b>5 268</b>	<b>9 841</b>
<b>Ending Stock</b>	<b>9 594</b>	<b>13 461</b>	<b>12 668</b>		<b>77 049</b>	<b>70 110</b>	<b>62 338</b>	<b>52 963</b>	<b>47 733</b>	<b>37 904</b>
Storers and traders	7 495	8 399	8 409		46 189	36 400	31 666	25 906	23 828	21 553
Processors	2 099	5 062	4 259		30 860	33 710	30 672	27 057	23 905	16 351



# SAGIS: Marketing year since 1997



CANOLA: SUPPLY AND DEMAND TAB Publication date: 2019-07-25

											Current Season	10 Year average
											Oct - Jun	
	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	2008/9-2017/18
											***	
											9	
CEC (Crop Estimate)	30 800	40 400	36 900	58 800	79 000	112 000	121 000	93 000	105 000	93 500	104 500	77 040
<b>SUPPLY</b>												
Opening stock (1 Oct)	10 900	10 700	9 500	4 400	6 885	12 479	29 355	50 313	16 386	21 350	6 527	17 227
Prod deliveries	30 600	40 100	36 900	58 800	79 541	112 345	120 974	93 543	103 996	92 802	104 079	76 960
Imports	0	0	0	0	0	0	0	0	20 928	0	0	2 093
Surplus	200	800	2 200	1 300	2 529	3 012	2 939	498	1 032	740	827	1 525
<b>Total Supply</b>	<b>41 700</b>	<b>51 600</b>	<b>48 600</b>	<b>64 500</b>	<b>88 955</b>	<b>127 836</b>	<b>153 268</b>	<b>144 354</b>	<b>142 342</b>	<b>114 892</b>	<b>111 433</b>	<b>97 805</b>
<b>DEMAND</b>												
Processed	31 000	42 100	44 100	56 700	75 920	98 312	102 885	127 835	120 875	108 322	73 514	80 805
-human	0	0	0	0	0	0	0	0	0	0	0	0
-animal	0	600	100	100	1 188	1 823	339	3 198	4 877	3 075	2 875	1 530
-crushed oil & cake	31 000	41 500	44 000	56 600	74 732	96 489	102 546	124 637	115 998	105 247	70 639	79 275
Withdrawn by producers	0	0	0	0	0	5	0	0	0	0	0	1
Released to end-consumers	0	0	100	800	159	35	89	95	118	28	18	142
Seed for planting purposes	0	0	0	0	0	0	0	0	0	0	0	0
Net receipts(-)/disp(+)	0	0	0	100	397	129	-19	38	-1	15	-3	66
Deficit	0	0	0	0	0	0	0	0	0	0	0	0
Exports	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Demand</b>	<b>31 000</b>	<b>42 100</b>	<b>44 200</b>	<b>57 600</b>	<b>76 476</b>	<b>98 481</b>	<b>102 955</b>	<b>127 968</b>	<b>120 992</b>	<b>108 365</b>	<b>73 529</b>	<b>81 014</b>
<b>Ending Stock (30 Sep)</b>	<b>10 700</b>	<b>9 500</b>	<b>4 400</b>	<b>6 900</b>	<b>12 479</b>	<b>29 355</b>	<b>50 313</b>	<b>16 386</b>	<b>21 350</b>	<b>6 527</b>	<b>37 904</b>	<b>16 791</b>
- processed p/month	2600	3500	3700	4700	6327	8193	8574	10653	10073	9027	8168	6 735
- months' stock	4.1	2.7	1.2	1.5	2.0	3.6	5.9	1.5	2.1	0.7	4.6	3

Note: \*\*\* Figures for current season up to date



# SAGIS: Monthly Data – Oilseeds Products Manufactured



OILSEEDS PRODUCTS MANUFACTURED PER MARKETING YEAR

Date published: 2019/08/02

	Marketing year: Mar 2017 - Feb 2018 Manufactured Tons Progressive: 12 Months	Marketing year: Mar 2018 - Feb 2019 Manufactured Tons Progressive: 12 Months	Marketing year: Mar 2019 - Feb 2020 Manufactured Tons Progressive: 4 Months (Mar - Jun)
Palm Oil and Derivatives	0	0	0
Soybean Oil	152 434	180 325	63 330
Sunflower Oil	319 052	315 406	51 308
Cottonseed Oil	0	0	0
Coconut Oil/ Groundnut Oil/ Canola Oil/ Corn (Maize) Oil/ Blends or mixes of Oils which includes one of the above Oils/ Biodiesel	55 278	51 780	16 582
Cottonseed Oilcake	0	0	0
Sunflower Oilcake	369 122	379 395	62 852
Coconut Oilcake	0	0	0
Palmnut Oilcake	0	0	0
Soybean Oilcake/ Canola Oilcake	722 794	847 062	296 940
Soybean Flours and Meals/ Textured Vegetable Protein	35 121	38 779	13 113
Soybean Fullfat	155 345	224 233	78 258
Peanut Butter and Paste	30 422	29 734	10 001
<b>Total</b>	<b>1 839 568</b>	<b>2 066 714</b>	<b>592 384</b>

# SAGIS: Monthly Data – Oilseeds Products

## Imported



### OILSEEDS PRODUCTS IMPORTED PER MARKETING YEAR

Date published: 2019/08/02

	Marketing year: Mar 2017 - Feb 2018	Marketing year: Mar 2018- Feb 2019	Marketing year: Mar 2019 - Feb 2020
	Imported Tons Progressive: 12 Months	Imported Tons Progressive: 12 Months	Imported Tons Progressive: 4 Months (Mar - Jun)
Palm Oil and Derivatives	323 198	536 957	181 075
Soybean Oil	50 123	116 828	17 492
Sunflower Oil	81 034	143 635	88 862
Cottonseed Oil	1 995	3 250	2 500
Coconut Oil/ Groundnut Oil/ Canola Oil/ Corn (Maize) Oil/ Blends or mixes of Oils which includes one of the above Oils/ Biodiesel	4 789	12 641	2 960
Cottonseed Oilcake (Including Pellets)	167	0	34
Sunflower Oilcake (Including Pellets)	24 166	48 777	66 500
Coconut Oilcake (Including Pellets)	0	0	0
Palmnut Oilcake (Including Pellets)	0	0	0
Soybean Oilcake/ Canola Oilcake (Including Pellets)	438 555	358 850	162 325
Soybean Flours and Meals/ Textured Vegetable Protein	0	0	0
Soybean Fullfat	0	0	0
Peanut Butter and Paste	1 320	1 035	668
<b>Total</b>	<b>925 347</b>	<b>1 221 973</b>	<b>522 416</b>

# SAGIS: Monthly Data – Oilseeds Products Exported



## OILSEEDS PRODUCTS EXPORTED PER MARKETING YEAR

Date published: 2019/08/02

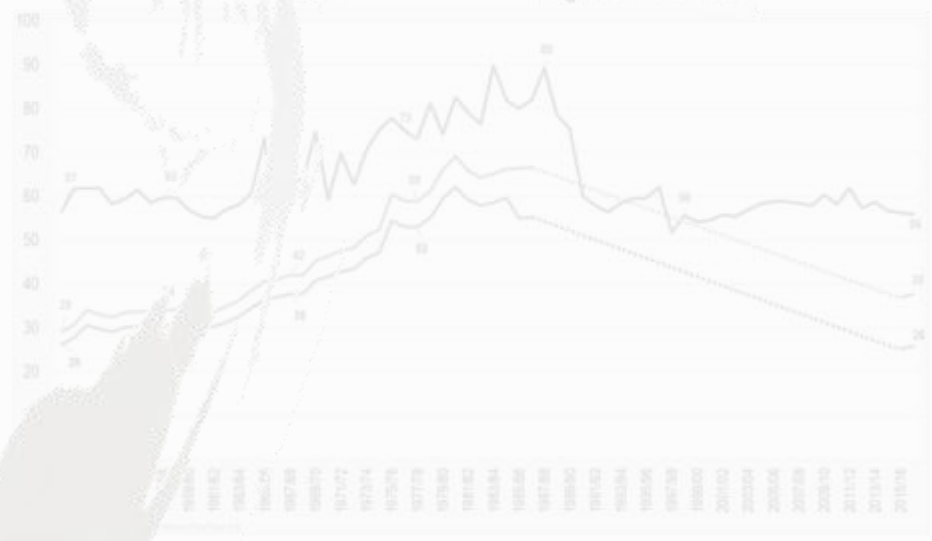
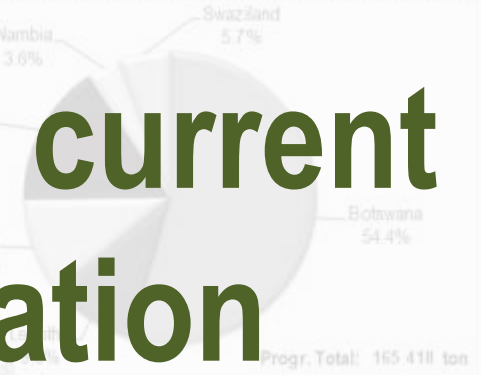
	Marketing year: Mar 2017 - Feb 2018	Marketing year: Mar 2018 - Feb 2019	Marketing year: Mar 2019 - Feb 2020
	Exported Tons Progressive: 12 Months	Exported Tons Progressive: 12 Months	Exported Tons Progressive: 4 Months (Mar - Jun)
Palm Oil and Derivatives	23 661	15 771	5 211
Soybean Oil	33 775	29 459	6 417
Sunflower Oil	2 151	2 169	1 016
Cottonseed Oil	0	0	0
Coconut Oil/ Groundnut Oil/ Canola Oil/ Corn (Maize) Oil/ Blends or mixes of Oils which includes one of the above Oils/ Biodiesel	2 308	977	252
Cottonseed Oilcake (Including Pellets)	0	0	0
Sunflower Oilcake (Including Pellets)	2 343	3 464	2 444
Coconut Oilcake (Including Pellets)	0	0	0
Palmnut Oilcake (Including Pellets)	0	0	0
Soybean Oilcake/ Canola Oilcake (Including Pellets)	13 141	11 420	3 718
Soybean Flours and Meals/ Textured Vegetable Protein	0	1 802	1 278
Soybean Fullfat	4 904	7 120	1 344
Peanut Butter and Paste	345	821	123
<b>Total</b>	<b>82 628</b>	<b>73 003</b>	<b>21 803</b>



Year	Area	Inter:	Area
2017/18	2 428.7	Estimate	2 428.7
2018/19	2 501.6	Estimate	2 501.6
2019/20	2 687.4 (b)	Not available	Not available
2020/21	2 565.0	Not available	Not available
2021/22	1 678.8 (b)	Not available	Not available



# Canola current situation



# Canola: Supply & Demand

## (International & International – Marketing season)

	SAGIS	Grain SA	International (USDA)	
Marketing year	Oct - Sep		Jul - Jun	
	Final 2017/18	Projection 2018/19	Estimate 2018/19	Projection 2019/20
	'000t	'000t	Mil ton	Mil ton
Opening stocks	21.4	6.5	7.6	9.3
Production	92.8	104.0	72.8	70.5
Imports	0.0	0.0	14.6	15.5
Total use	108.4 <sup>(b)</sup>	99.1 <sup>(b1)</sup>	71.1	70.1
Exports	0.0	0.0	14.6	15.6
Closing stocks	6.5 <sup>(a)</sup>	10.3 <sup>(a)</sup>	9.3	8.7

(a) All stocks, regardless ownership thereof, in commercial structures.

(b) Including producer withdrawals, seed and end users. (SAGIS (b) 0.3 (t), Grain SA (b1): Proj. 0.1

Sources: SAGIS: 25 Jul '19, USDA: 21 Aug '19, Grain SA: 26 Jul '19



# Canola: CEC Estimate

## WINTER CEREALS – PRELIMINARY AREA PLANTED ESTIMATE: 2019 PRODUCTION SEASON

CROP/GEWAS	Area planted/ Opp beplant 2019 Ha (A)	Intentions/ Voorneme* Mid April 2019 Ha (B)	Area planted/ Opp beplant 2018 Ha (C)	Final crop/ Finale oes 2018 Tons (D)	Change/ Verandering % (A) ÷ (C)
<b>Commercial/Kommersieel:</b>					
Wheat/Koring	<b>536 950</b>	513 450	503 350	1 868 000	+6,68
Malting barley/Moutgars	<b>120 500</b>	118 500	119 000	421 500	+1,26
Canola/Kanola	<b>74 000</b>	80 000	77 000	104 500	-3,90
Cereal oats/Hawermout	<b>22 000</b>	N/A	19 235	32 700	+14,37

\* Intentions based on conditions at the middle of April 2019 / Voorneme gebaseer op toestande soos teen middel April 2019.



# Production overview

Crop estimates vs. producer deliveries

	<b>2018/19</b>	<b>2017/18</b>	<b>2016/17</b>
CEC Production	* 104 500	93 500	105 000
SAGIS Deliveries	** 104 092	92 802	103 996
Difference	408	698	1 004

\* CEC Final Estimate

\*\* SAGIS Progr. Mar - Jul '19



# SAGIS: Historic info on Ha & Production



Production year	Wheat			Groundnuts			Sunflowerseed			Barley			Canola		
	Hectare	Ton	Ton/h	Hectare	Ton	Ton/h	Hectare	Ton	Ton/h	Hectare	Ton	Ton/h	Hectare	Ton	Ton/h
1998/99	745 000	1 687 500	2.27	94 550	98 250	1.04	828 000	1 109 000	1.34	112 000	215 100	1.92	17 000	21 000	1.24
1999/2000	718 000	1 770 000	2.47	82 600	113 550	1.37	396 350	530 625	1.34	101 700	90 800	0.89	25 000	23 000	0.92
2000/01	934 000	2 348 550	2.51	165 250	183 840	1.11	521 695	638 320	1.22	77 700	142 350	1.83	19 145	21 229	1.11
2001/02	973 500	2 450 000	2.52	94 160	120 185	1.28	667 510	928 790	1.39	79 190	156 800	1.98	27 000	25 750	0.95
2002/03	941 100	2 427 000	2.58	49 850	60 005	1.20	606 450	642 610	1.06	73 440	178 900	2.44	33 000	37 975	1.15
2003/04	748 000	1 540 000	2.06	71 500	115 000	1.61	530 000	648 000	1.22	84 220	240 000	2.85	44 200	40 770	0.92
2004/05	830 000	1 680 000	2.02	40 000	64 000	1.60	460 000	620 000	1.35	82 650	189 365	2.29	45 500	32 000	0.70
2005/06	805 000	1 905 000	2.37	48 550	74 000	1.52	472 480	520 000	1.10	90 000	225 000	2.50	40 200	44 200	1.10
2006/07	764 800	2 105 000	2.75	40 770	58 000	1.42	316 350	300 000	0.95	89 780	236 000	2.63	32 000	36 500	1.14
2007/08	632 000	1 905 000	3.01	54 200	88 800	1.64	564 300	872 000	1.55	73 360	222 500	3.03	33 200	39 840	1.20
2008/09	748 000	2 130 000	2.85	54 550	99 500	1.82	635 800	801 000	1.26	68 245	192 000	2.81	34 000	30 800	0.91
2009/10	642 500	1 958 000	3.05	57 450	88 000	1.53	397 700	490 000	1.23	74 760	216 000	2.89	35 060	40 310	1.15
2010/11	558 100	1 430 000	2.56	55 150	64 250	1.17	642 700	860 000	1.34	82 670	194 000	2.35	34 820	36 900	1.06
2011/12	604 700	1 905 280	3.15	45 450	65 690	1.45	453 300	527 110	1.16	80 150	300 910	3.75	43 510	58 800	1.35
2012/13	515 200	1 870 000	3.63	46 900	41 500	0.88	504 700	557 000	1.10	84 940	298 000	3.51	44 100	79 650	1.81
2013/14	505 500	1 870 000	3.70	52 125	74 500	1.43	598 950	832 000	1.39	81 320	267 500	3.29	72 165	112 000	1.55
2014/15	476 570	1 750 000	3.67	58 000	62 300	1.07	576 000	663 000	1.15	85 125	302 000	3.55	95 000	121 000	1.27
2015/16	482 150	1 440 000	2.99	22 600	17 680	0.78	718 500	755 000	1.05	93 730	332 000	3.54	78 050	93 000	1.19
2016/17	508 365	1 909 540	3.76	56 000	92 050	1.64	635 750	874 000	1.37	88 695	354 065	3.99	68 075	105 460	1.55
2017/18	491 600	1 535 000	3.12	56 300	57 000	1.01	601 500	862 000	1.43	91 380	307 000	3.36	84 000	93 500	1.11
2018/19	503 350	1 868 000	3.71	20 050	18 880	0.94	515 350	655 640	1.27	119 000	421 500	3.54	77 000	104 500	1.36
2019/20	536 950									120 500			74 000		

Winter crops: Area planted and Final production figures: 2018 Production season

Winter crops: Preliminary area planted: 2019 Production season

Summer crops: Sixth crop estimate: 2019

Updated: 25 July 2019

# Production overview

## Increase in oilseeds production after deregulation: World vs RSA

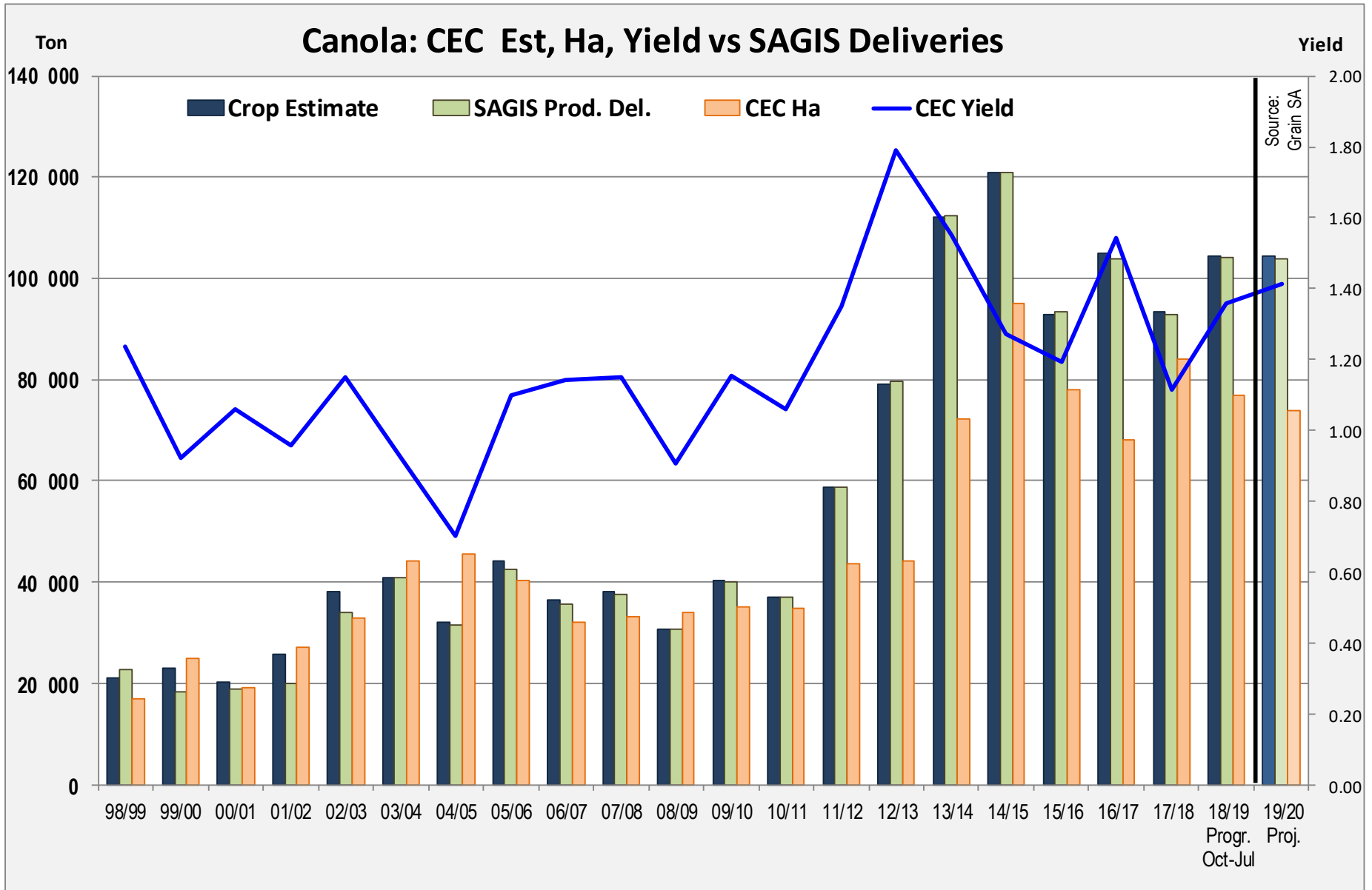
	World			RSA		
	Soy beans	Sunflower	Canola	Soy beans	Sunflower	Canola
	Tons			Tons		
1998/99	159 807 000	26 692 000	35 755 000	227 000	587 000	22 600
1999/2000	160 298 000	27 206 000	42 524 000	186 600	1 087 000	18 400
2000/01	175 790 000	22 929 000	37 349 000	153 300	553 400	19 000
2001/02	184 920 000	21 262 000	36 021 000	228 000	709 600	19 900
2002/03	196 832 000	23 731 000	33 277 000	216 700	901 200	33 900
2003/04	186 479 000	26 592 000	39 459 000	126 300	617 200	40 800
2004/05	215 490 000	25 389 000	46 240 000	217 900	652 900	31 500
2005/06	220 785 000	29 923 000	48 843 000	265 200	612 700	42 400
2006/07	235 701 000	30 081 000	45 751 000	419 100	524 900	35 600
2007/08	219 546 000	27 346 000	49 149 000	185 400	310 100	37 600
2008/09	212 340 000	32 917 000	58 166 000	264 000	846 600	30 600
2009/10	260 733 000	31 560 000	60 789 000	508 200	806 900	40 100
2010/11	264 684 000	32 696 000	60 523 000	531 500	477 300	36 900
2011/12	240 955 000	38 618 000	61 228 000	690 300	866 300	58 800
2012/13	269 075 000	34 993 000	63 305 000	621 892	534 251	79 541
2013/14	283 309 000	41 511 000	70 586 000	759 146	542 165	112 345
2014/15	320 734 000	39 186 000	70 426 000	919 723	833 165	120 974
2015/16	316 565 000	40 566 000	68 739 000	1 042 129	663 669	93 543
2016/17	350 582 000	48 048 000	69 432 000	713 660	759 614	103 996
2017/18	341 532 000	47 835 000	74 908 000	1 290 218	872 171	92 802
2018/19	362 870 000	51 514 000	72 782 000	1 502 976	863 184	104 079
% Increase 21 years	127	93	104	562	47	361

Source: USDA, SAGIS

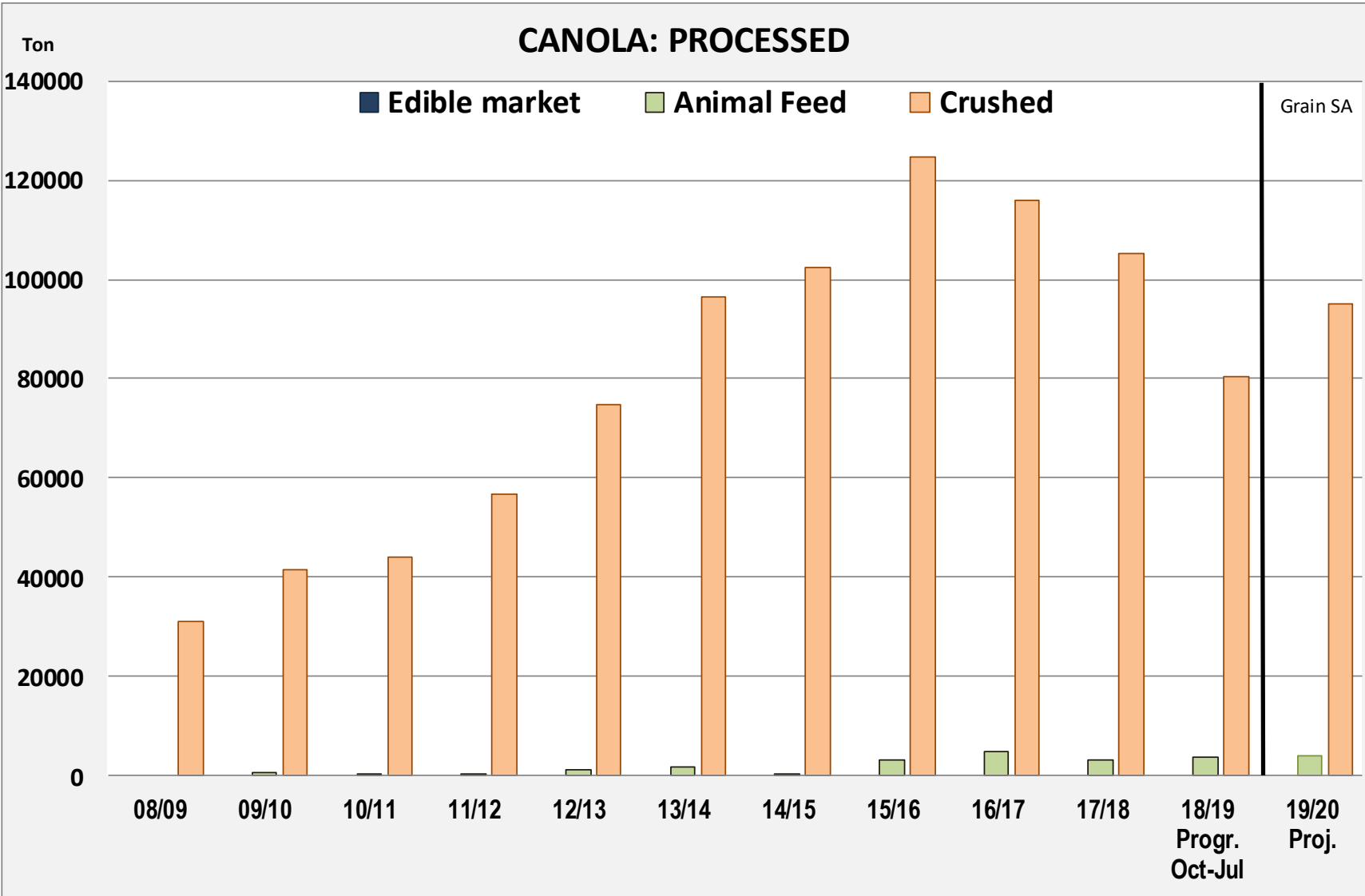
# Canola: CEC Estimate, Yield, Ha & SAGIS Deliveries

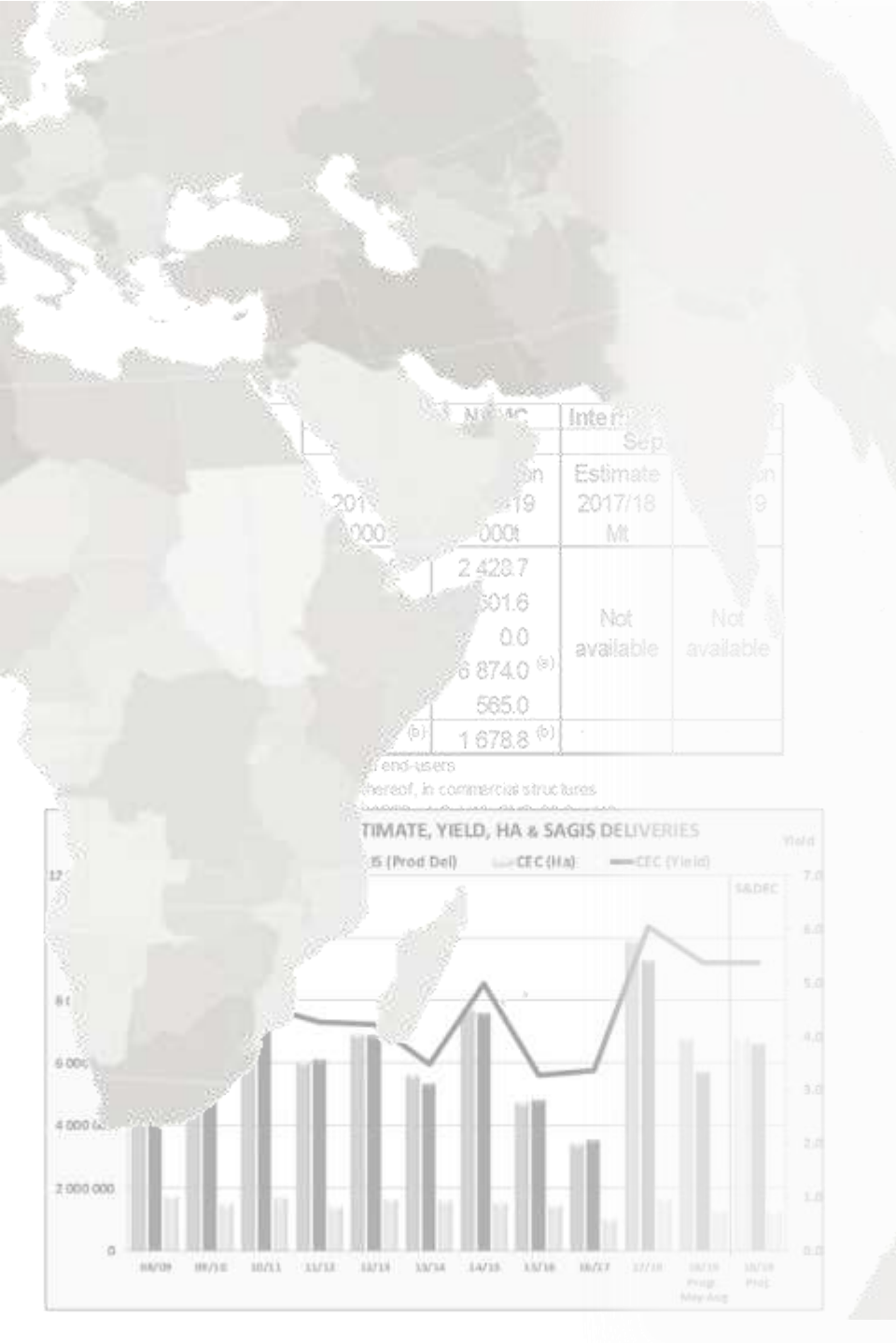


1998/99 – 2018/19 (Progr.) - 21 Year period



# Canola: Consumption



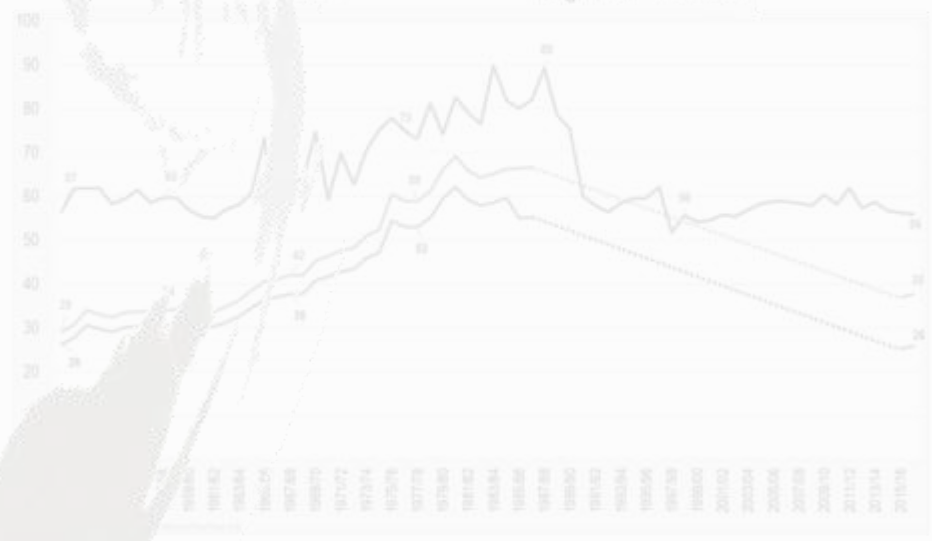


Year	Production (000 Mt)	Internal Consumption (000 Mt)	Export (000 Mt)
2017/18	2 428.7	Estimate 2 017/18	411.7
2018/19	2 501.6	Not available	Not available
2019/20	2 687.0 (b)	Not available	Not available
2020/21	2 565.0	Not available	Not available
2021/22	1 678.8 (b)	Not available	Not available

# Products



TIMATE, YIELD, HA & SAGIS DELIVERIES



# Canola: Processed

(Same period previous year consumption)

Canola Processed	2019/20 *		2018/19 **	
	Firms	Tons	Firms	Tons
Animal Feed	9	3 588	11	2 762
Oil and Oilcake	2	80 443	2	88 454
		<b>84 031</b>		<b>91 216</b>

\* 2019/20: Oct '19 -Jul '19

Source: SAGIS

\*\* 2018/19: Oct '18 - Jul '19



# Canola: Products Manufactured

(Oct '18 – Jun '19)

Manufactured	2017/18 (12 months)	2017/18 Progr. Oct-Jun (9 months)	2018/19 Progr. Oct-Jun (9 months)
	Tons		
Coconut Oil/ Groundnut Oil/ <b>Canola Oil</b> / Corn (Maize) Oil/ Blends or mixes of Oils which includes one of the above Oils/ Biodiesel	54 086	40 251	36 308
Soybean Oilcake/ <b>Canola Oilcake</b>	755 271	552 294	695 243
<b>Total</b>	<b>809 357</b>	<b>592 545</b>	<b>731 551</b>





# Canola: Products Imported (Oct '18 – Jun '19)

Imported	2017/18 (12 months)	2017/18 Progr. Oct-Jun (9 months)	2018/19 Progr. Oct-Jun (9 months)
	Tons		
Coconut Oil/ Groundnut Oil/ <b>Canola Oil</b> / Corn (Maize) Oil/ Blends or mixes of Oils which includes one of the above Oils/ Biodiesel	7 431	4 991	9 121
Soybean Oilcake/ <b>Canola Oilcake</b> (incl pellets)	396 296	302 303	287 854
<b>Total</b>	<b>403 727</b>	<b>307 294</b>	<b>296 975</b>



# Canola Products Exported

(Oct '18 – Jun '19)

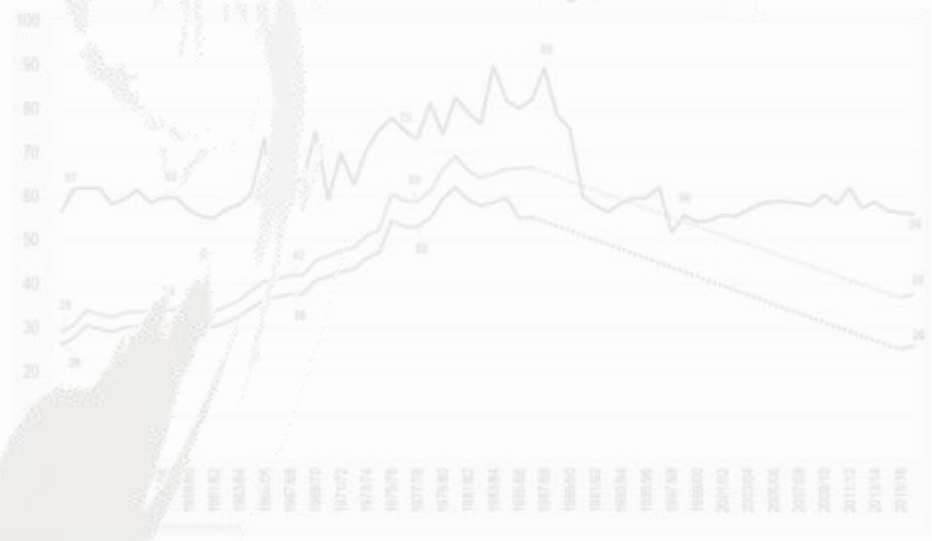
Exported	2017/18 (12 months)	2017/18 Progr. Oct-Jun (9 months)	2018/19 Progr. Oct-Jun (9 months)
	Tons		
Coconut Oil/ Groundnut Oil/ <b>Canola Oil</b> / Corn (Maize) Oil/ Blends or mixes of Oils which includes one of the above Oils/ Biodiesel	1 049	793	564
Soybean Oilcake/ <b>Canola Oilcake</b> (incl pellets)	11 378	8 814	7 736
<b>Total</b>	<b>12 427</b>	<b>9 607</b>	<b>8 300</b>





Year	Production (000 Mt)	Internal Consumption (000 Mt)	Export (000 Mt)
2017/18	2 428.7	Estimate 2017/18	1 919
2018/19	2 501.6	Not available	Not available
2019/20	2 687.4 (b)	Not available	Not available
2020/21	2 565.0	Not available	Not available
2021/22	1 678.8 (b)	Not available	Not available

# Price movements



# Canola: Indicative **Import** Parity Prices

2019/08/20	Canadian Vancouver
	Aug 2019
	<b>\$/t</b>
International FOB value	362.00
Freight rate	42.00
Insurance (0.3% of FOB)	1.09
Cost, Insurance and Freight	405.09
R/\$ Wisselkoers op: 2019/08/20	15.3949
	<b>R/t</b>
<i>Converted to:</i>	
Cost, Insurance and Freight (CIF)	6 236.32
Financing cost	51.26
Cost, Insurance, Freight and Financing	6 287.58
Discharging cost - Durban	202.93
Import tariff	557.30
Free on Rail (FOR) - Durban (2019/07/09)	7 047.81
<i>Free on Rail (FOR) - Durban (2018/08/21)</i>	<i>7 529.35</i>



# Canola: International Prices

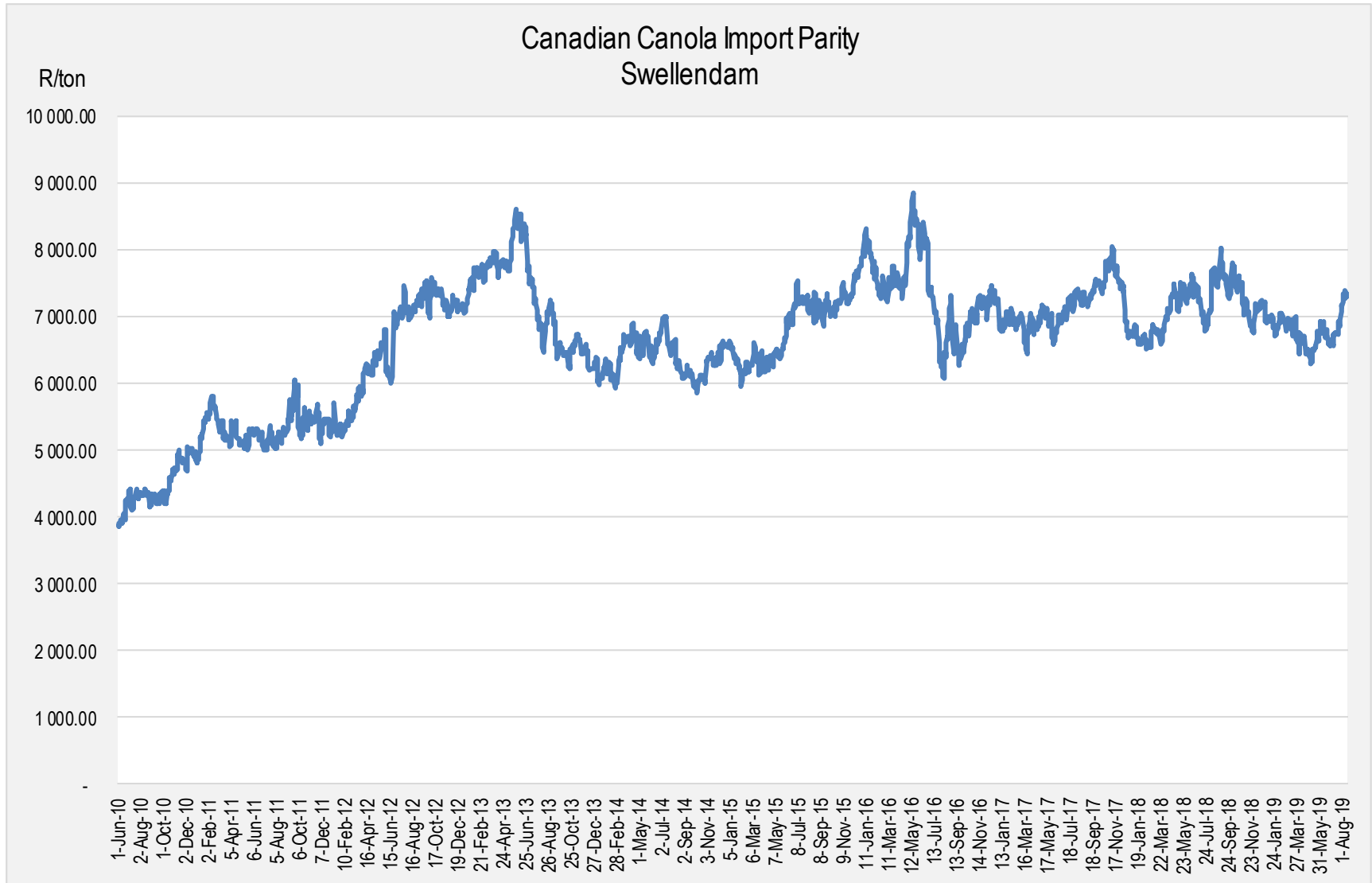
	August					
	2018/19		2017/18		2016/17	
	Price	% Year on Year	Price	% Year on Year	Price	% Year on Year
Rapeseed, Europe cif Hamburg	419.00	-4.99	441.00	4.01	424.00	2.17

Source: Oil World



# Canola International prices

(Progr. Jun '10 – Aug '19)



# Prices: SARS Imports

(2019/20: Progr. Mar – Jun '19)

Imports		2019/20		
		Progr. Mar - Jun'19		
		Ton	FOB value (R'000)	FOB R'Ton
1205.90	Rape seeds - whether or not broken - Other	175	28 887.07	165 068.97
1205.10.20	Rape seeds - whether or not broken - Low erucic acid - Seed for sowing	75	12 713.02	169 687.89
1205.10.90	Rape seeds - whether or not broken - Low erucic acid - Other	3	117.72	39 240.00
1514.11.10	Low erucic acid rape or colza oil - Crude oil - For cooking food	0	0.00	0.00
1514.11.90	Low erucic acid rape or colza oil - Crude oil - Other	2 271	28 196.90	12 413.66
1514.19.10	Rape, Colza or mustard oil - For cooking food	2	5.14	2 815.22
1514.19.90	Rape, Colza or mustard oil - Other other	102	1 249.52	12 266.20
1514.99.10	Rape, colza or mustard oil - Other in containers	126	125.93	1 000.00
1514.99.90	Rape, colza or mustard oil - Other other	3	79.25	22 945.57
2306.49	Oilcake - Rape or Colza seeds - Other	60	88.15	1 469.15
<b>Total</b>		<b>2 817</b>	<b>71 463</b>	<b>25 364.47</b>

# Price Movements

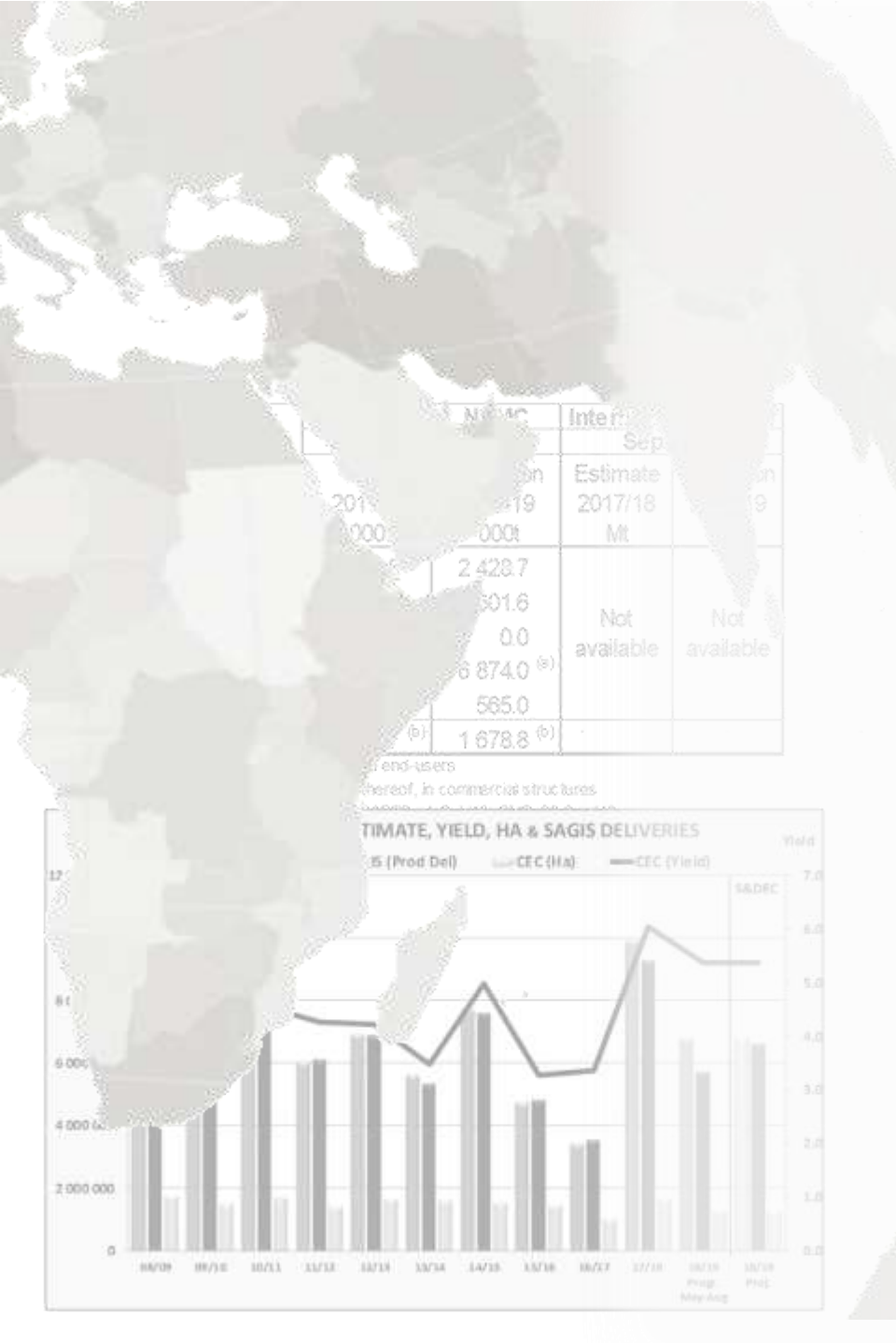
Products: Year on year price changes

	July				
	2019	% Year on Year	2018	% Year on Year	2017
	Price R		Price R		Price R
Brick Margarine 500g	27.10	0.04	27.09	-1.67	27.55
Peanut Butter 400g	30.05	7.86	27.86	-1.31	28.23
Sunflower Oil 750ml	21.85	1.77	21.47	-1.38	21.77

Source: SA Statistics





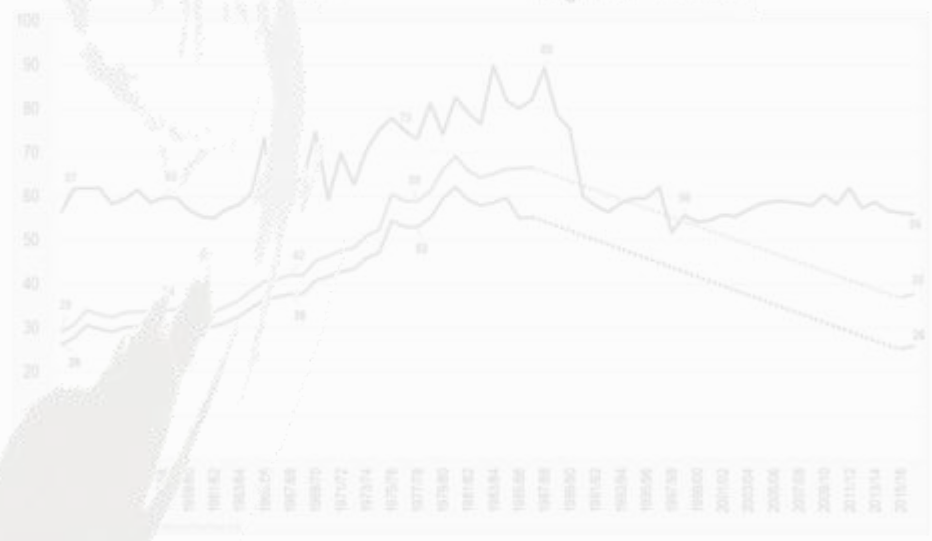


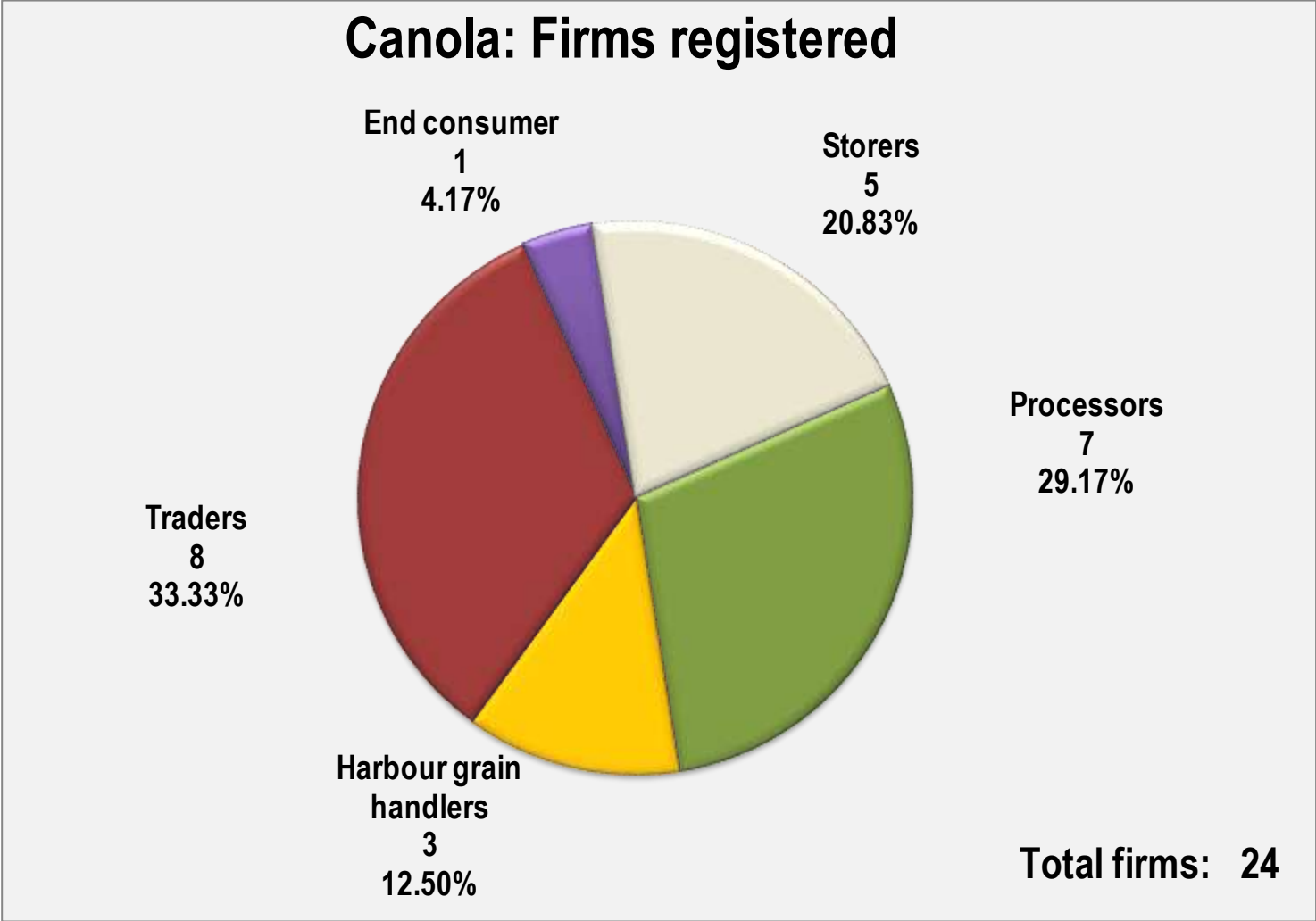
Year	Production (000 Mt)	Internal Consumption (000 Mt)	Export (000 Mt)
2017/18	2 428.7	Estimate 2 017/18	411.0
2018/19	2 501.6	Not available	Not available
2019/20	2 687.0 (b)	Not available	Not available
2020/21	2 565.0	Not available	Not available
2021/22	1 678.8 (b)	Not available	Not available

# General



of end-users  
thereof, in commercial structures





# Acknowledgement

## Board of Directors



Dr John Purchase  
**Chairperson**



Ms Mariana Purnell  
**Vice-Chairperson**

The Oil and Protein Seeds Dev. Trust & Oilseeds Industry is represented by:



Mr De Wet Boshoff



Dr Erhard Briedenhann



Ms Marie vd Merwe  
(Alternate)

# Acknowledgement

## Gratitude

The following parties makes it possible to fulfil SAGIS' commitments:

- Oilseeds Forum
- Advisory Committee
- Oil and Protein Seeds Development Trust
- Relevant Associations
- Board of Directors
- Co-workers
- Staff

---

### **Note:**

This presentation is available on the SAGIS website under Presentations