



# Sorghum Forum



19 October 2022

**Bernard Schultz**  
**General Manager**

# Sorghum: Crop estimates vs. Producer deliveries

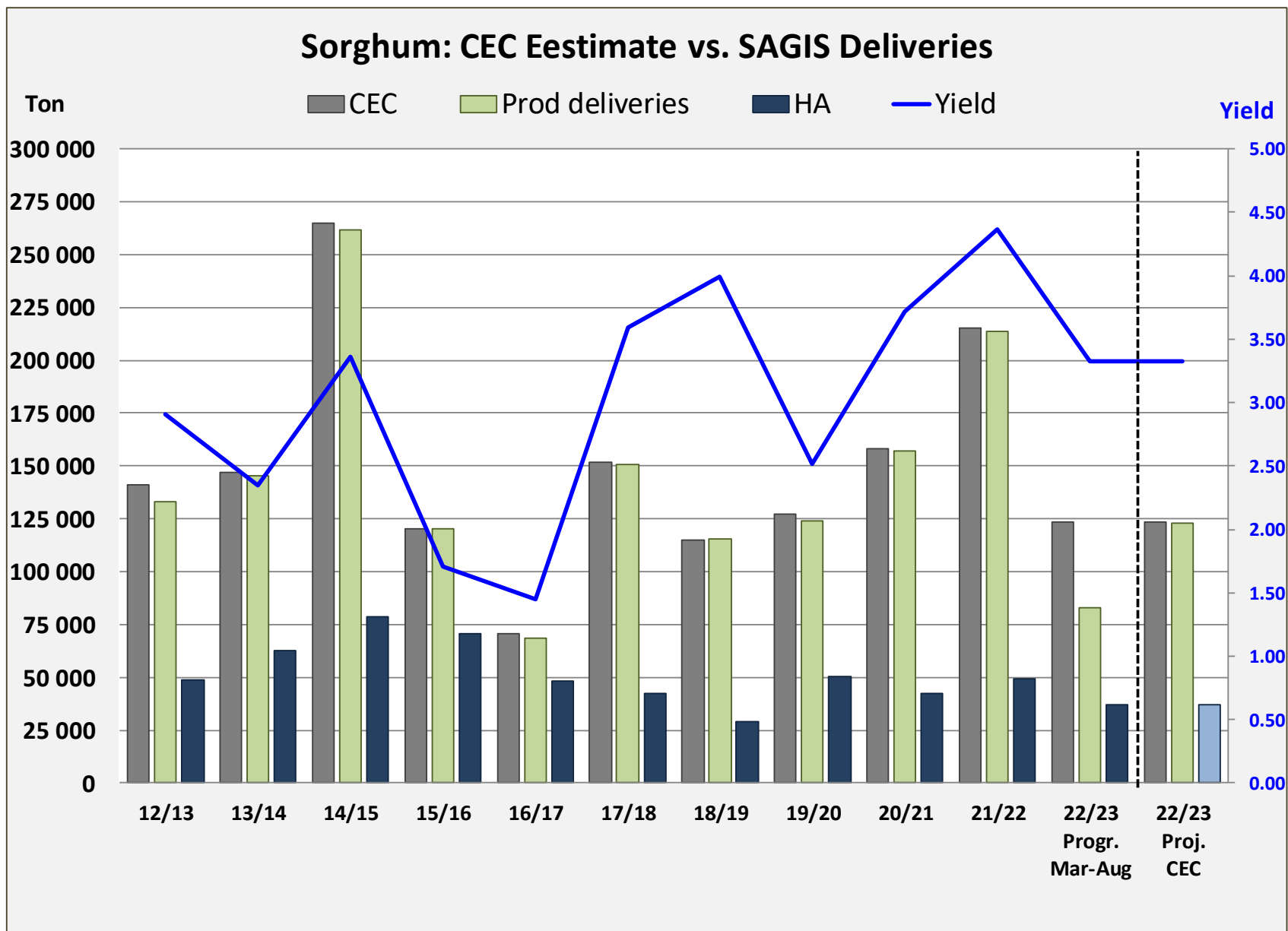
|                  | 2020/21 | 2021/22 | 2022/23     |
|------------------|---------|---------|-------------|
|                  | Ton     |         |             |
| CEC Production   | 158 000 | 215 000 | 123 700 (a) |
| Less Rentions    | 850     | 900     | 700         |
| Total available  | 157 150 | 214 100 | 123 000     |
| SAGIS Deliveries | 156 966 | 213 458 | 82 799 (b)  |
| Difference       | 184     | 642     | 40 201      |

(a) CEC Eighth Estimate

(b) SAGIS Progressive Mar - Aug '22



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



# Sorghum: Imports & Exports per marketing season

## 2022/23 Progressive summarised info

| <b>Whole Sorghum</b> | <b>2020/21</b> | <b>2021/22</b> | <b>2022/23<br/>Progr.<br/>Mar - Aug '22</b> |
|----------------------|----------------|----------------|---|
|                      | <b>Ton</b>     |                |   |
| Imports              | 6 546          | 4 147          | 380   |
| Exports *            | 5 380          | 9 058          | 6 515                                       |

\* Exports includes Products and Whole grain

Source: SAGIS

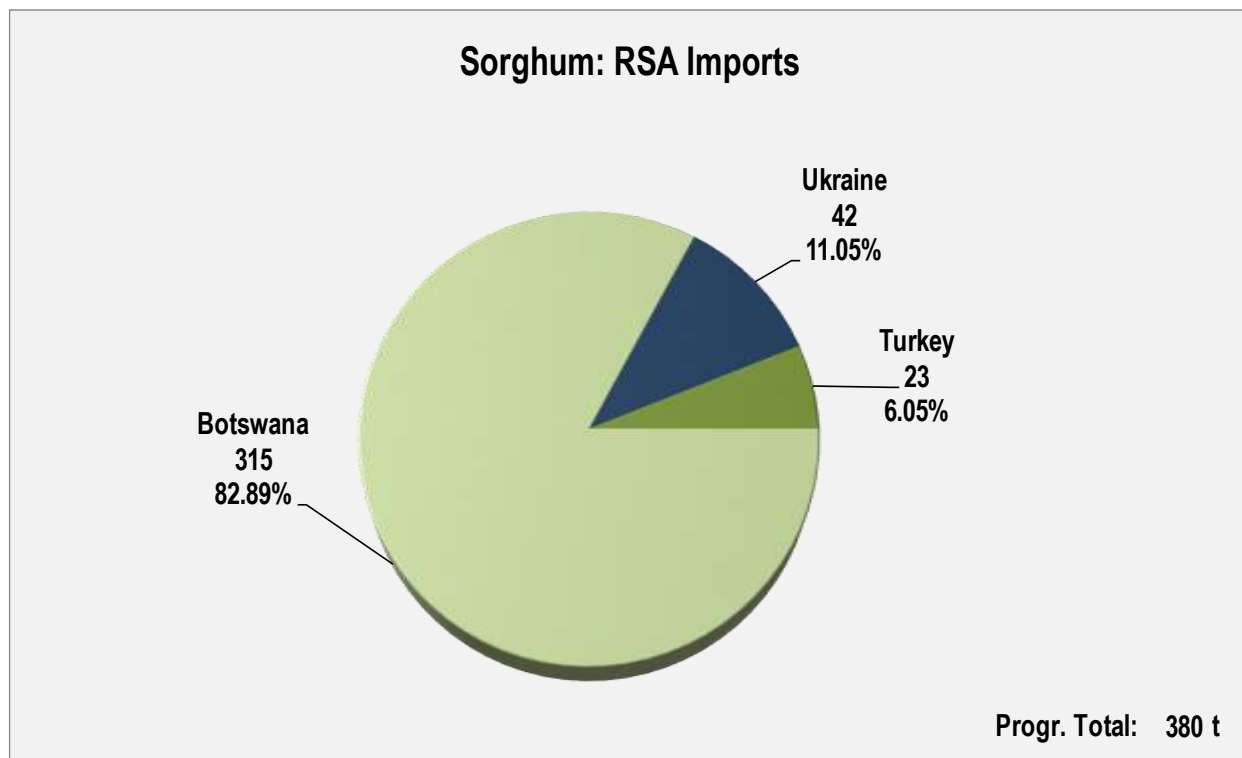


# Sorghum: Imports for RSA

(2022/23: Progr. 1 Mar – 31 Aug '22)

| Month               | Botswana   | Ukraine   | Turkey    | Month Total | Progressive Total |
|---------------------|------------|-----------|-----------|-------------|-------------------|
| 2022/03             | 0          | 0         | 0         | 0           | 0                 |
| 2022/04             | 0          | 23        | 0         | 23          | 23                |
| 2022/05             | 0          | 0         | 0         | 0           | 23                |
| 2022/06             | 0          | 0         | 23        | 23          | 46                |
| 2022/07             | 280        | 19        | 0         | 299         | 345               |
| 2022/08             | 35         | 0         | 0         | 35          | 380               |
| <b>Total progr.</b> | <b>315</b> | <b>42</b> | <b>23</b> | <b>380</b>  |                   |

Source: SAGIS



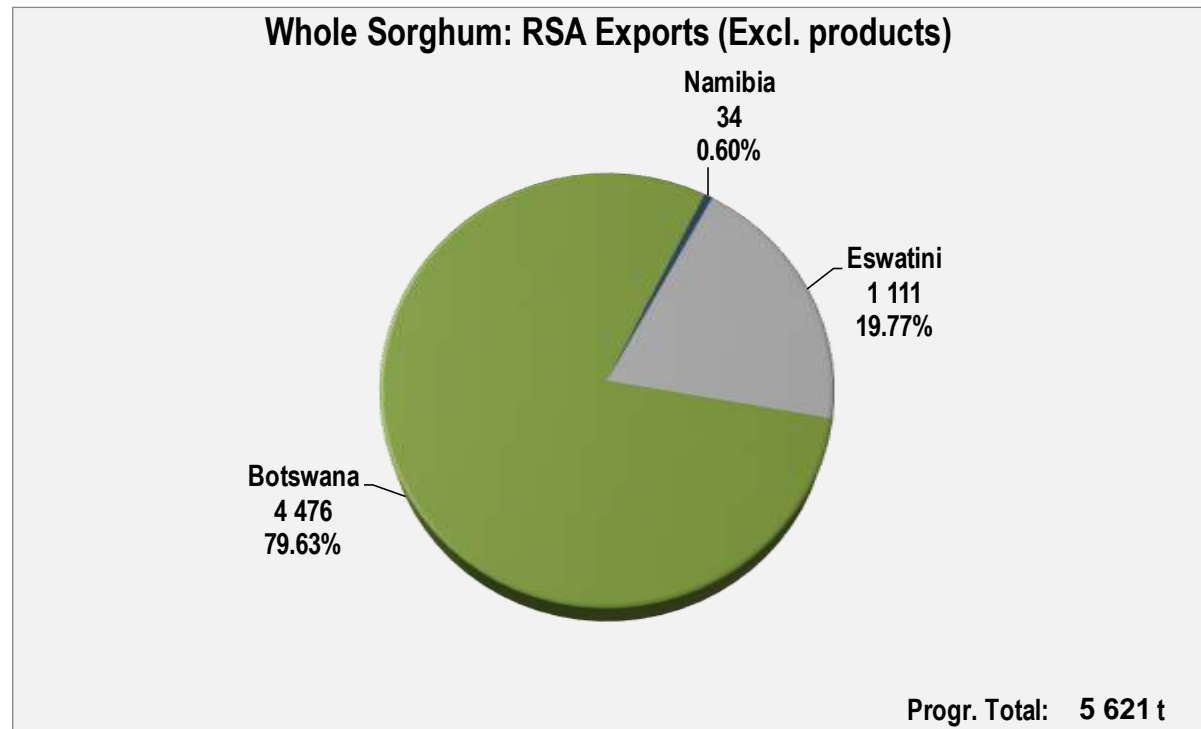
# Sorghum: Exports from RSA

(2022/23: Progr. 1 Mar – 31 Aug '21)

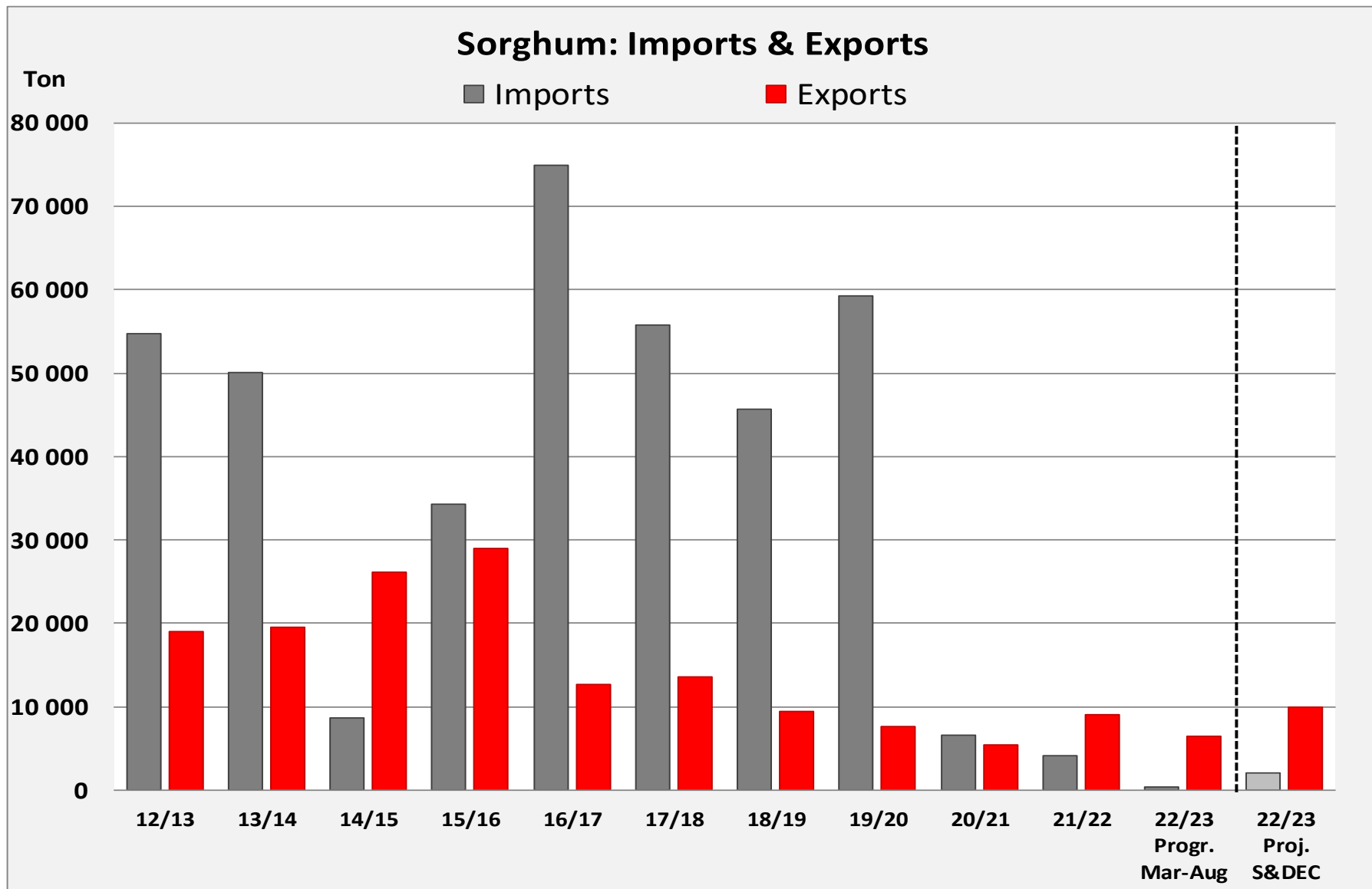
| Month        | Botswana     | Namibia   | Eswatini     | Month Total  | Progressive Total |
|--------------|--------------|-----------|--------------|--------------|-------------------|
| 2022/03      | 1 441        | 34        | 132          | 1 607        | 1 607             |
| 2022/04      | 1 282        | 0         | 215          | 1 497        | 3 104             |
| 2022/05      | 1 656        | 0         | 209          | 1 865        | 4 969             |
| 2022/06      | 97           | 0         | 100          | 197          | 5 166             |
| 2022/07      | 0            | 0         | 317          | 317          | 5 483             |
| 2022/08      | 0            | 0         | 138          | 138          | 5 621             |
| <b>TOTAL</b> | <b>4 476</b> | <b>34</b> | <b>1 111</b> | <b>5 621</b> | *                 |

\* Whole grain exported only - excluding products

Source: SAGIS

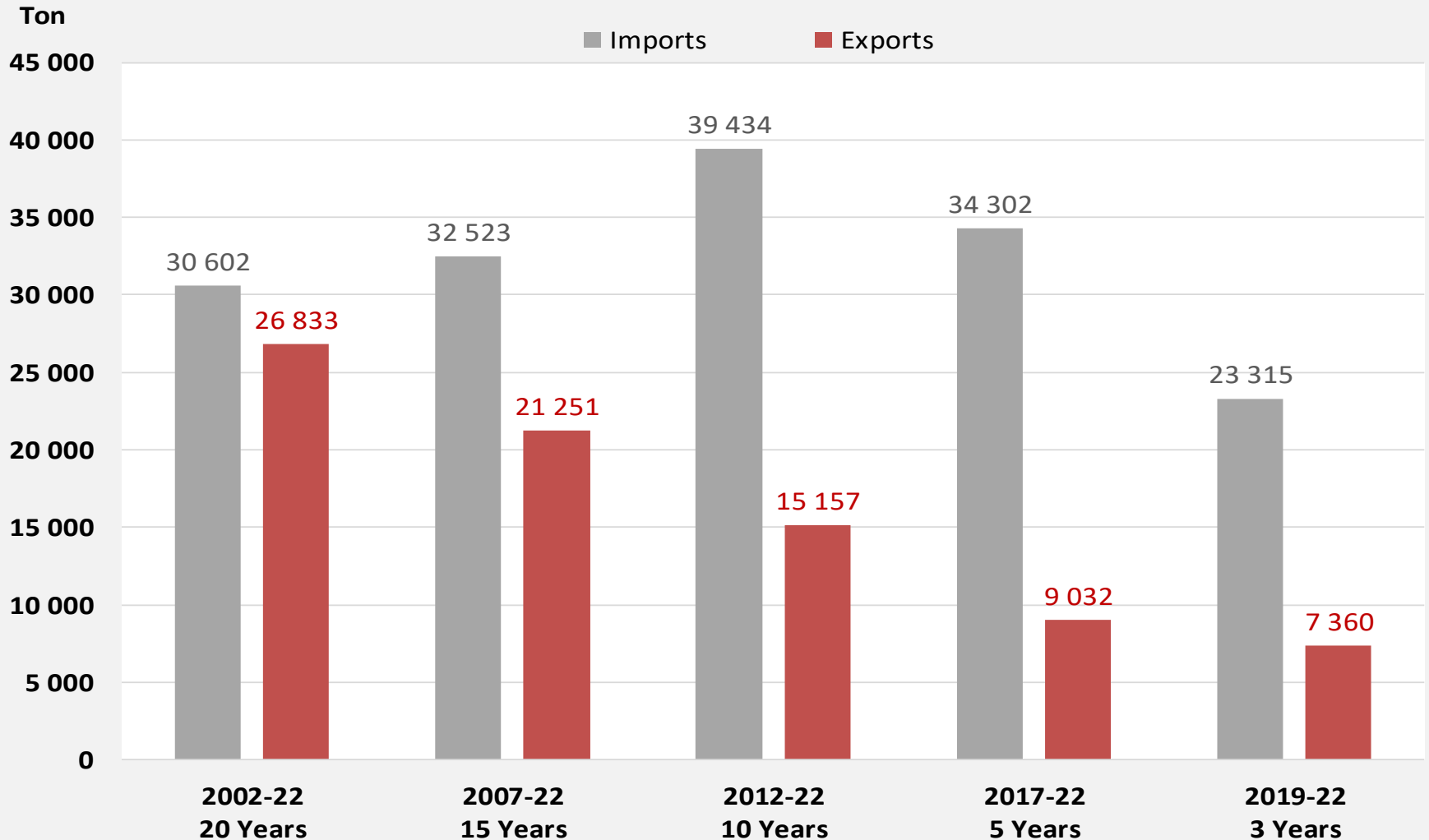


# Sorghum: Imports & Exports per marketing season



# Sorghum: Average Imports & Exports

**Sorghum: Import & Export Averages**  
(Full marketing years: Mar - Feb)





# Sorghum: Consumption

| Sorghum Processed  | SAGIS     |               |            |               | S&DEC          |
|--------------------|-----------|---------------|------------|---------------|----------------|
|                    | 2021/22 * |               | 2022/23 ** |               | 2022/23 **     |
|                    | Firms     | Tons          | Firms      | Tons          | Tons           |
| Indoor malting     | 6         | 6 557         | 6          | 6 815         | 12 500         |
| Floor malting      | 8         | 24 619        | 9          | 25 558        | 51 000         |
| Meal, rice & grits | 24        | 36 646        | 22         | 36 319        | 72 000         |
| Pet Food           | 3         | 343           | 3          | 239           | 505            |
| Poultry feed       | 31        | 4 315         | 30         | 4 684         | 9 300          |
| Livestock feed     | 5         | 1 058         | 6          | 5 483         | 9 500          |
|                    |           | <b>73 538</b> |            | <b>79 098</b> | <b>154 805</b> |

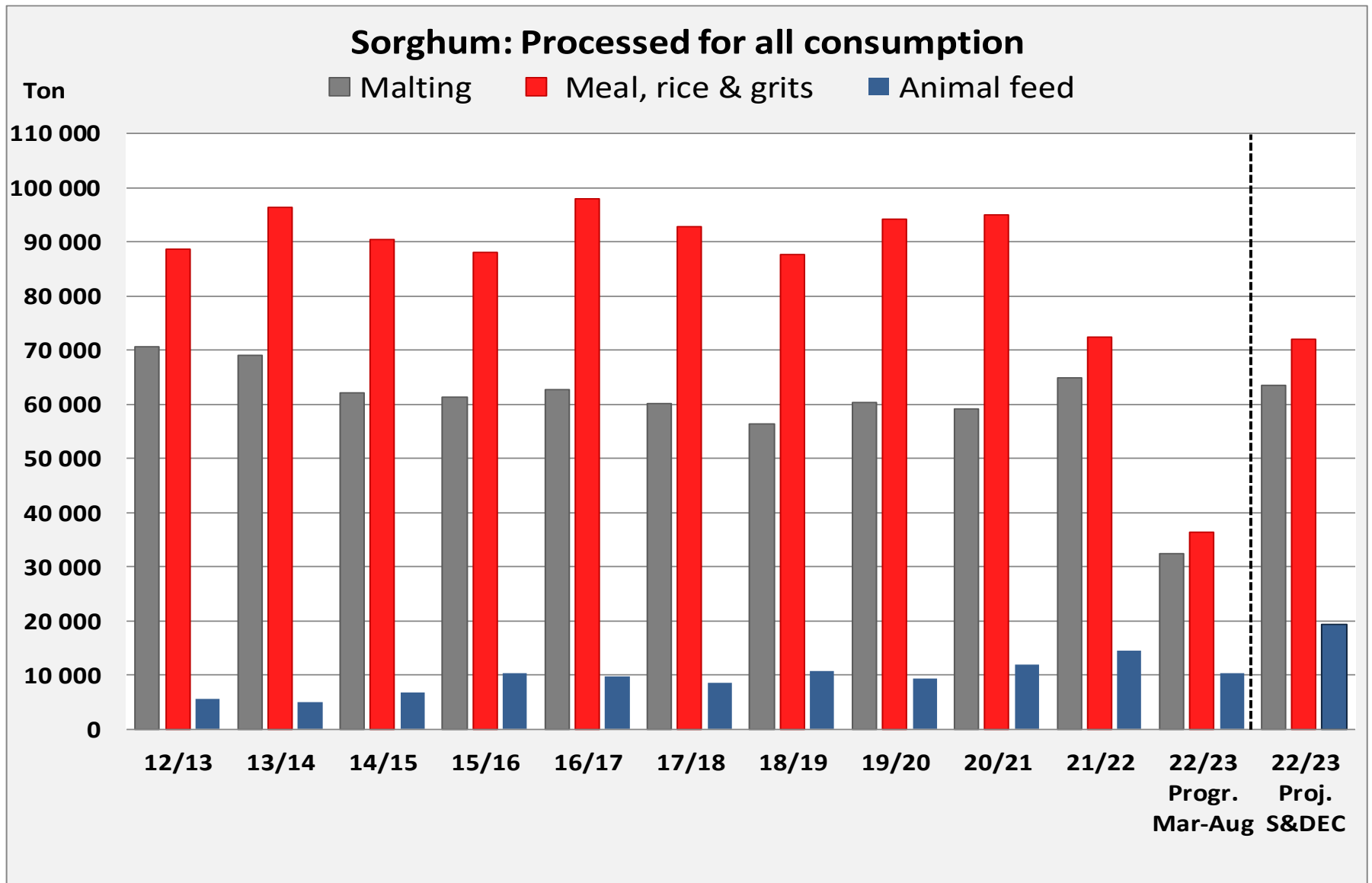
\* 2021/22: 1 Mar - 31 Aug '21

\*\* 2022/23: 1 Mar - 31 Aug '22

Source: SAGIS, S&DEC

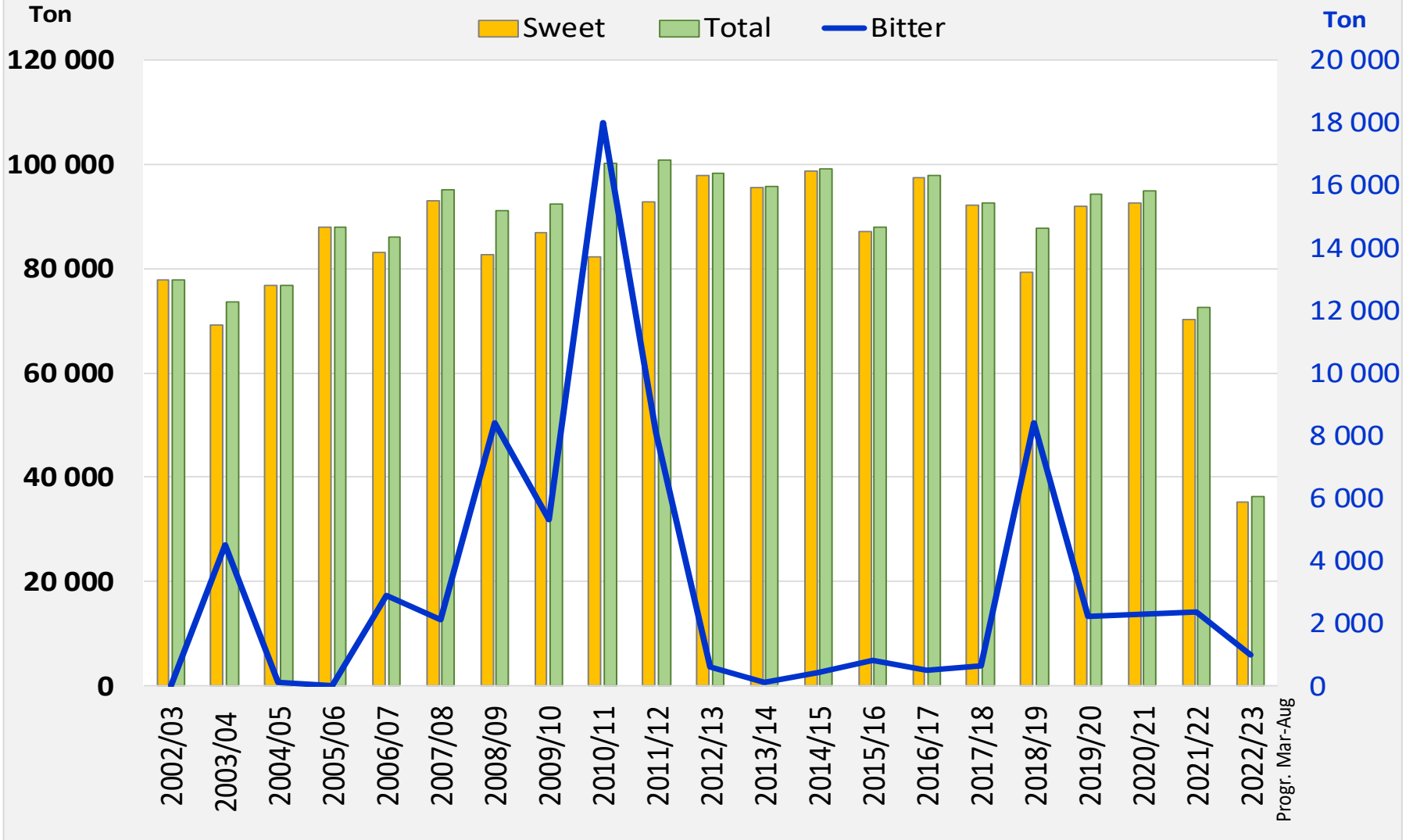


# Sorghum: Processed – all consumption

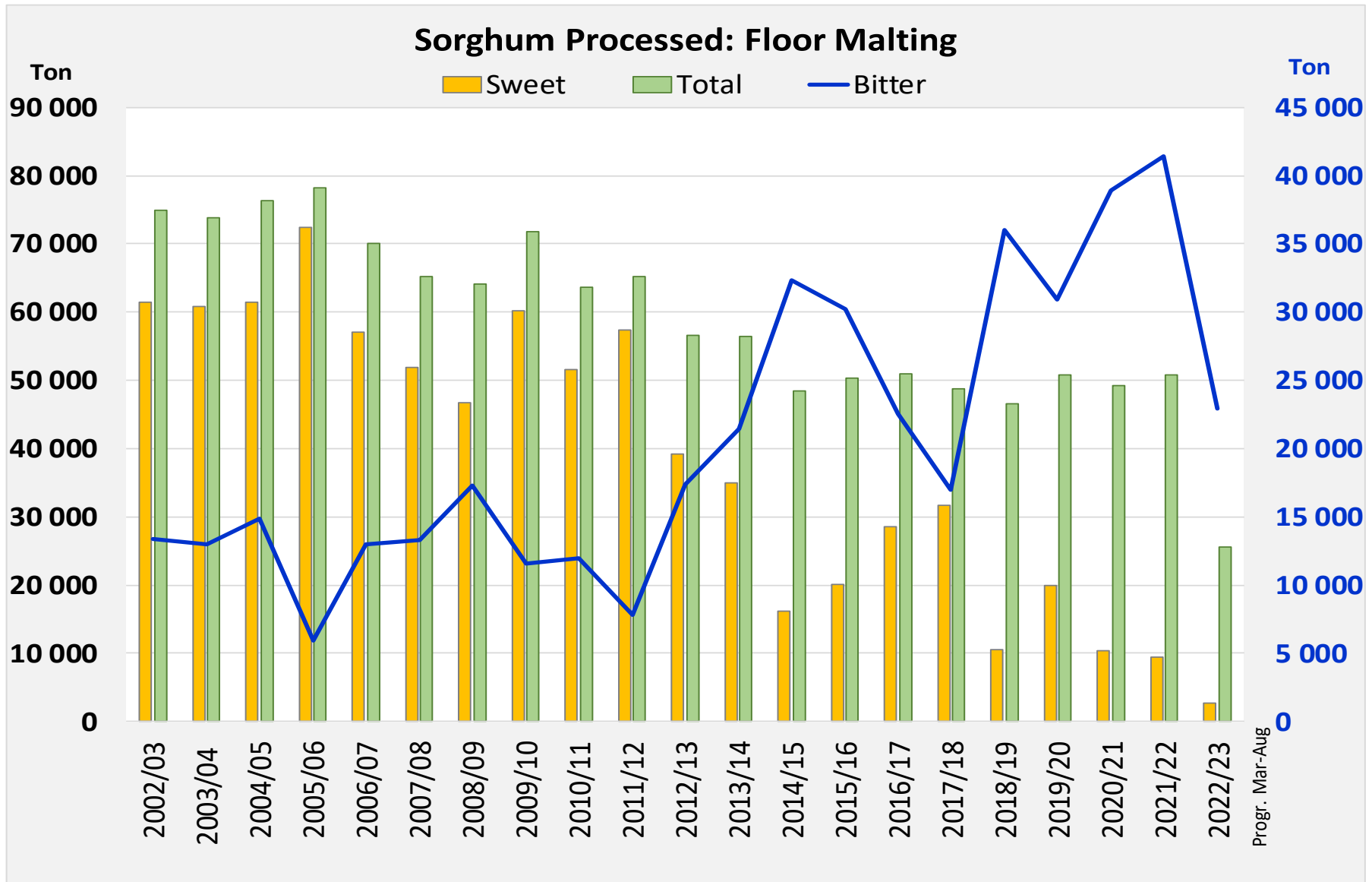


# Sorghum: Processed – Meal, rice & grits

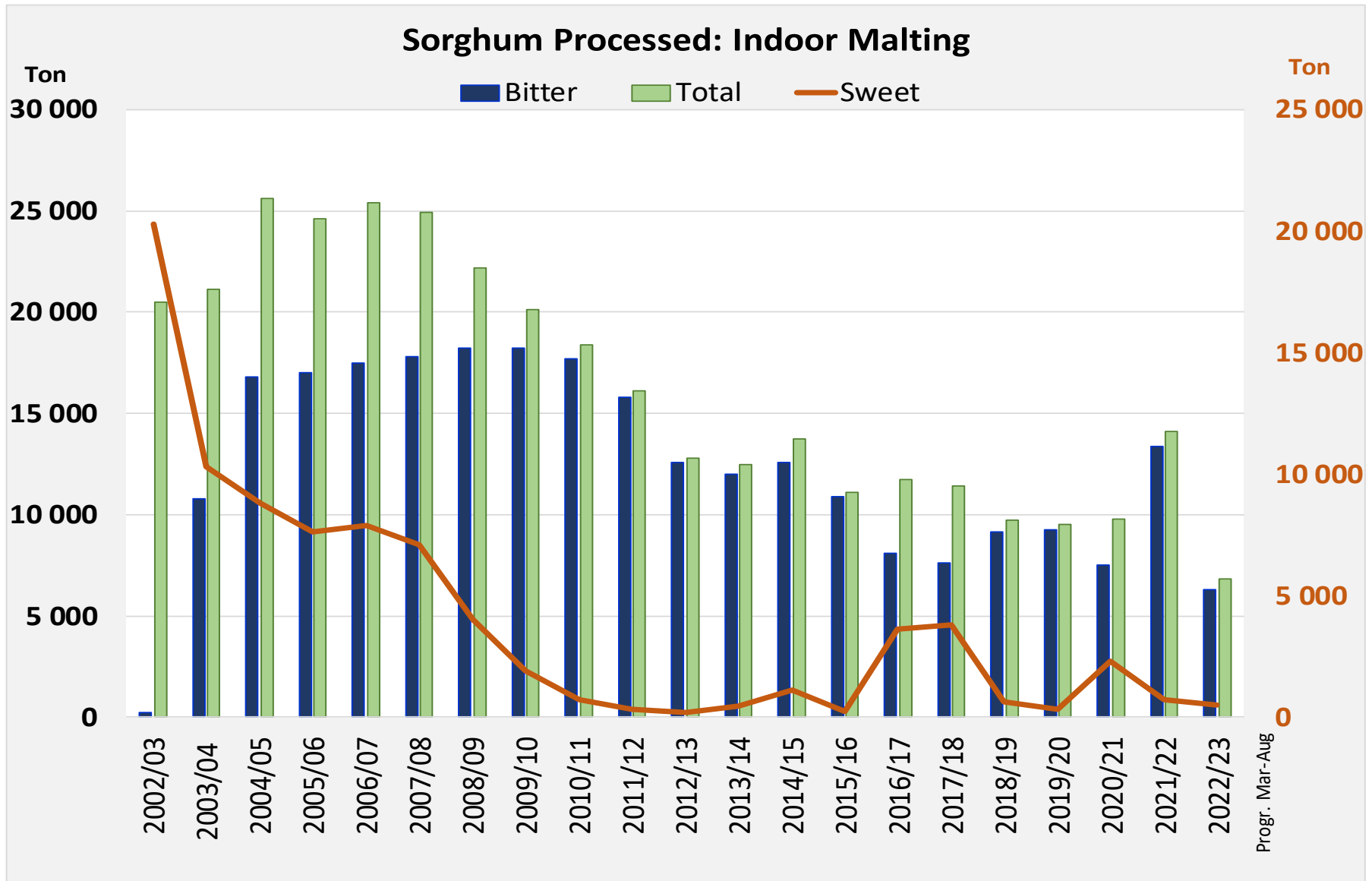
## Sorghum Processed: Meal, Rice and Grits



# Sorghum: Processed – Floor malting

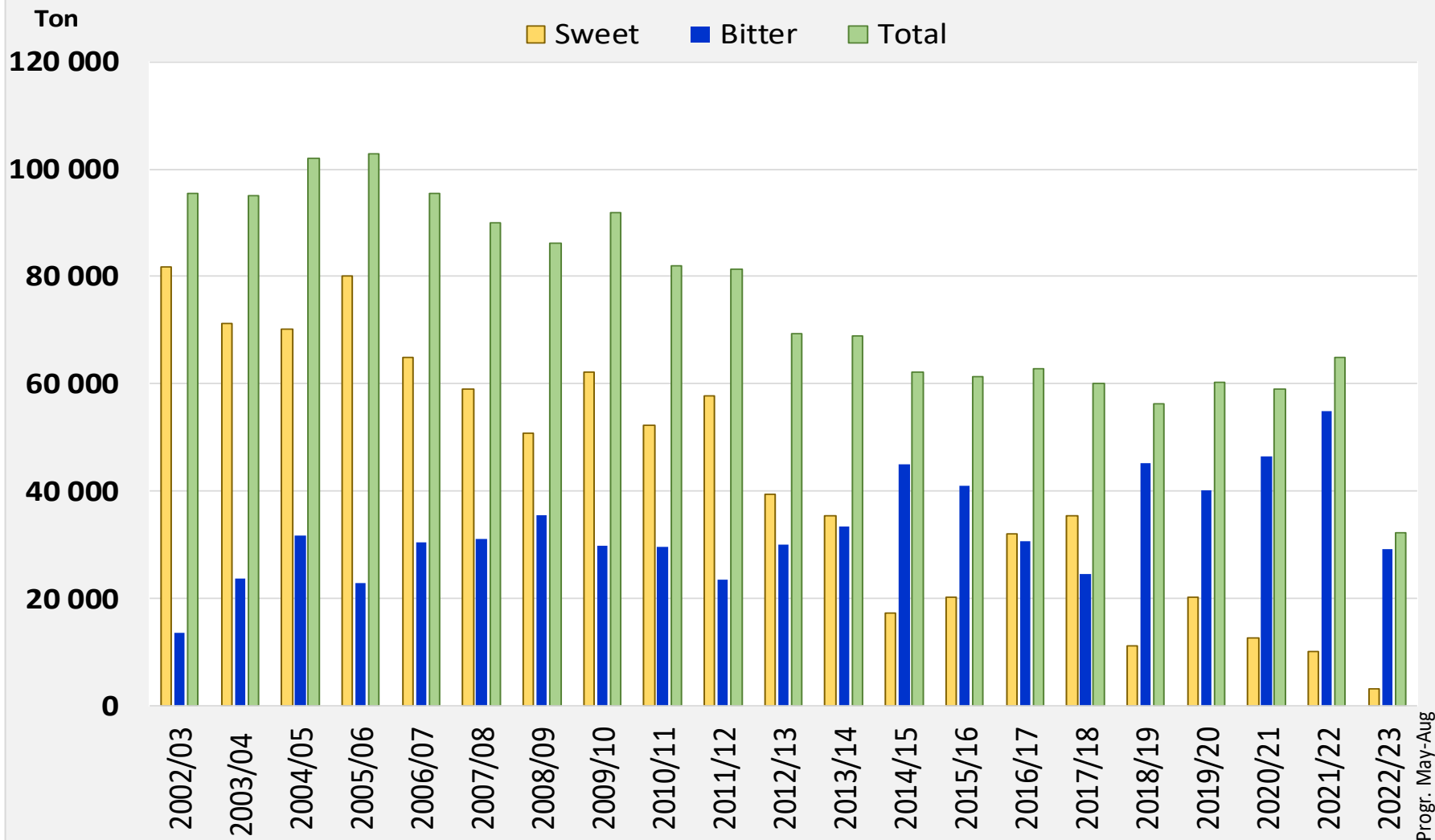


# Sorghum: Processed – Indoor malting



# Sorghum: Processed – Total malt

## Sorghum Processed: Total Malt



Progr. May-Aug

# Sweet & Bitter Sorghum: Supply & Demand

| Marketing year:<br>Mar - Feb | SAGIS            |        |         | NAMC<br>(S&DEC)        |        |         | SAGIS                                    |        |         |
|------------------------------|------------------|--------|---------|------------------------|--------|---------|--|--------|---------|
|                              | Final<br>2021/22 |        |         | Projection:<br>2022/23 |        |         | Progressive:<br>2022/23<br>Mar - Aug '22 |        |         |
|                              | Ton              |        |         |                        |        |         |  |        |         |
|                              | Sweet            | Bitter | Total   | Sweet                  | Bitter | Total   | Sweet                                    | Bitter | Total   |
| Opening stocks               | 25 372           | 26 423 | 51 795  | 51 986                 | 54 171 | 106 157 | 51 986                                   | 54 171 | 106 157 |
| Production                   | 120 359          | 93 099 | 213 458 | 85 600                 | 37 400 | 123 000 | 63 005                                   | 19 794 | 82 799  |
| Imports                      | 4 147            | 0      | 4 147   | 2 000                  | 0      | 2 000   | 380                                      | 0      | 380     |
| Total use                    | 90 857           | 63 723 | 154 580 | 91 850                 | 65 955 | 157 805 | 46 229                                   | 34 578 | 80 807  |
| Exports                      | 7 532            | 1 526  | 9 058   | 8 000                  | 2 000  | 10 000  | 5 288                                    | 1 227  | 6 515   |
| Sundries (a)                 | -497             | 102    | -395    | -9 400                 | -550   | -9 950  | -8 846                                   | -743   | -9 589  |
| Closing stocks (b)           | 51 986           | 54 171 | 106 157 | 49 136                 | 24 166 | 73 302  | 72 700                                   | 38 903 | 111 603 |

(a) Net dispatches(+)/Receipts(-) plus Surplus (-)/Deficit(+)

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

Source: SAGIS, NAMC: S&DEC

# Sorghum: Total Supply & Demand

(National vs. International – Marketing season)

|                 | SAGIS                  | NAMC<br>(S&DEC)        | SAGIS                                  | International<br>(IGC) |                        |
|-----------------|------------------------|------------------------|--|------------------------|------------------------|
| Marketing year: | Mar - Feb              |                        |  | Sep - Aug              |                        |
|                 | Final<br>2021/22       | Projection:<br>2022/23 | Progressive:<br>Mar-Aug '22<br>2022/23 | Estimate:<br>2021/22   | Projection:<br>2022/23 |
|                 | Ton                    |                        |  | Mil ton                |                        |
| Opening stocks  | 51 795                 | 106 157                | 106 157                                | 3.9                    | 4.3                    |
| Production      | 213 458                | 123 000                | 82 799                                 | 62.1                   | 60.3                   |
| Imports         | 4 147                  | 2 000                  | 380                                    | 11.9                   | 9.3                    |
| Total use       | 154 580 <sup>(a)</sup> | 157 805 <sup>(a)</sup> | 80 807 <sup>(a)</sup>                  | 61.6                   | 60.4                   |
| Exports         | 9 058                  | 10 000                 | 6 515                                  | 12.0                   | 9.9                    |
| Sundries        | -395 <sup>(b)</sup>    | -9 950 <sup>(b)</sup>  | -9 589 <sup>(b)</sup>                  |                        |                        |
| Closing stocks  | 106 157 <sup>(c)</sup> | 73 302 <sup>(c)</sup>  | 111 603 <sup>(c)</sup>                 | 4.3                    | 3.7                    |

(a) Including producer withdrawals, seed and end users

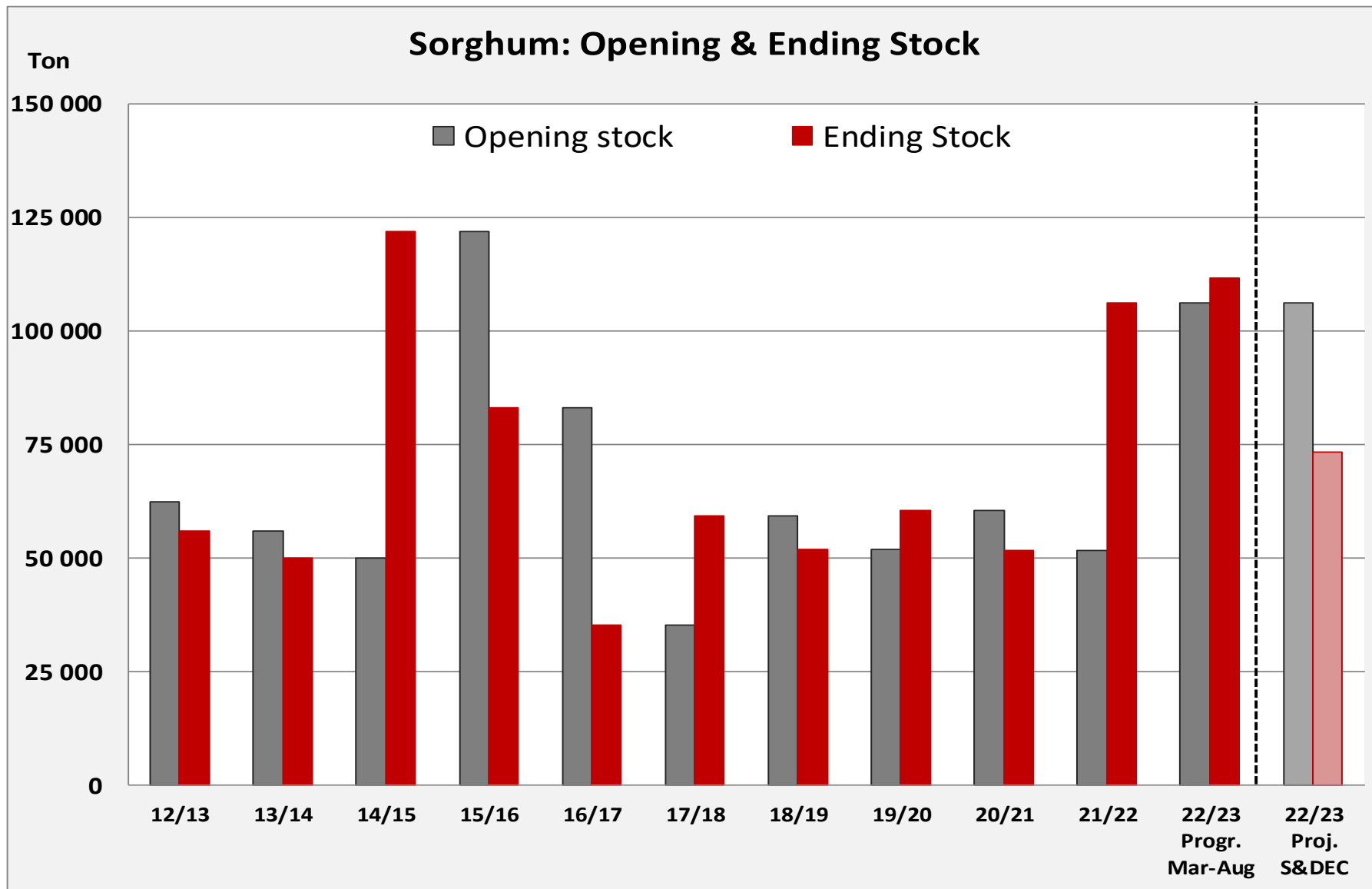
(b) Net dispatches(+)/Receipts(-) plus Surplus (-)/Deficit(+)

(c) All stocks, regardless ownership thereof, in commercial structures

Source: SAGIS, NAMC: S&DEC, CEC & USDA



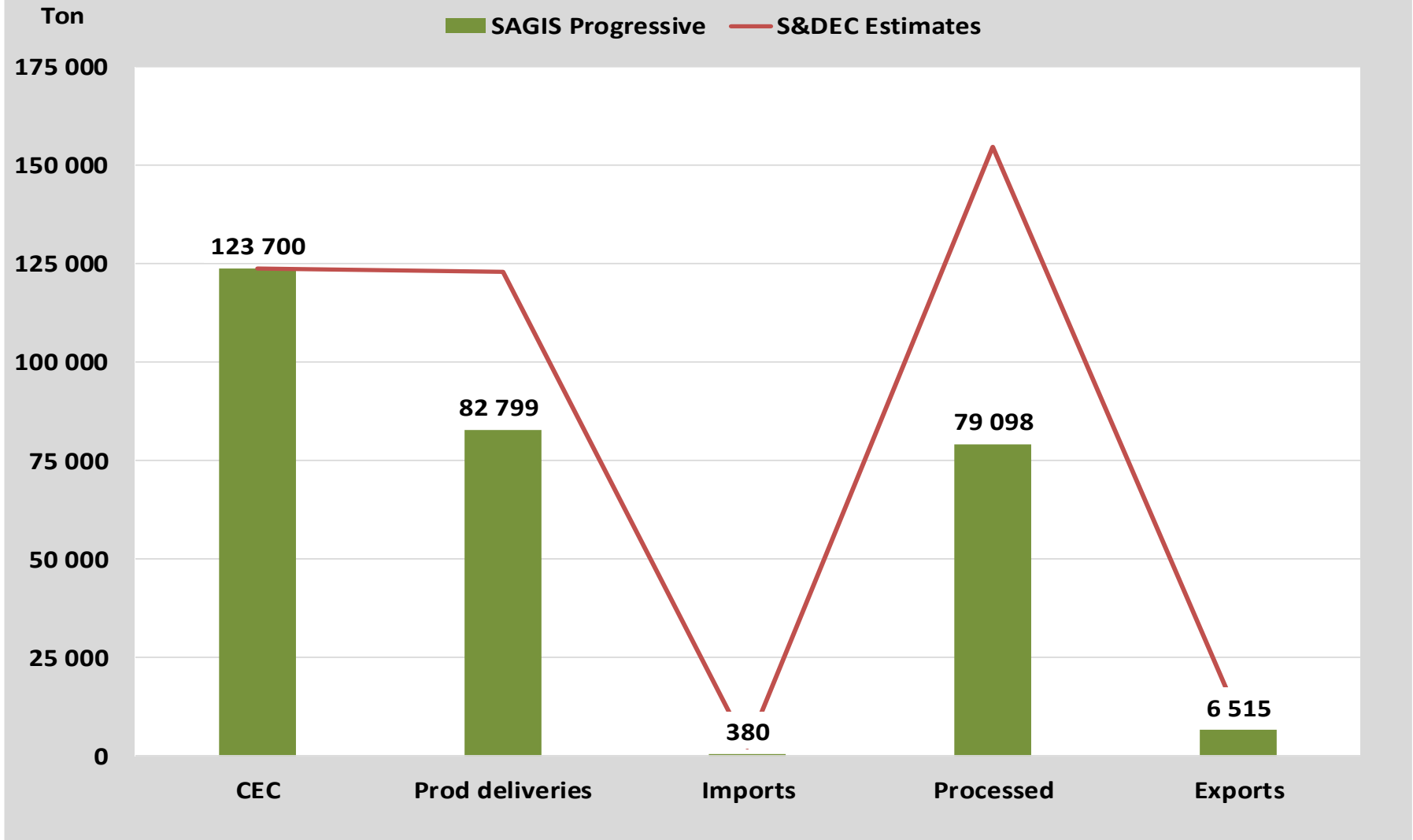
# Sorghum: Opening & Ending Stocks



# Sorghum: 2022/23 Marketing Year

(Progr. 1 Mar – 31 Aug '22)

## SORGHUM CURRENT MARKETING YEAR



# Price movements



# Sorghum: Price movements

## Indicative **Import** Parity Prices

| 2022/10/11                             | Sorghum<br>USA<br>Golf<br>Nov '22 | Sorghum<br>Argentine<br>Up River<br>Nov '22 | Sorghum<br>Australian<br>Brisbane<br>Nov '22 |
|--|-----------------------------------|---|--|
|  | \$/t                              | \$/t  | \$/t   |
| FOB value                              | 367.00                            | 285.00                                      | 292.00                                       |
| Freight                                | 45.00                             | 44.00                                       | 44.00  |
| Insurance (0.3% of FOB)                | 1.10                              | 0.86  | 0.88   |
| Cost, insurance and freight (CIF) \$/t | 413.10                            | 329.86                                      | 336.88                                       |
| <i>Converted to R/t</i>                |                                   |   |  |
| R/\$ Exchange rate on: 2022/10/11      | 18.1006                           | 18.1006                                     | 18.1006                                      |
|  | R/t                               | R/t   | R/t  |
| Cost, insurance and freight (CIF)      | 7 477.36                          | 5 970.66                                    | 6 097.73                                     |
| Financing                              | 59.92                             | 47.85                                       | 48.87  |
| Cost, insurance, freight & financing   | 7 537.28                          | 6 018.51                                    | 6 146.60                                     |
| Discharging (Durban)                   | 219.30                            | 219.30                                      | 219.30                                       |
| Import tariff                          | 199.29                            | 154.76                                      | 158.56                                       |
| FOR at Durban                          | 7 736.57                          | 6 173.27                                    | 6 305.16                                     |
| Railage: Durban to Randfontein         | 263.25                            | 263.25                                      | 263.25                                       |
| DELIVERED - Durban to Randfontein      | 7 999.82                          | 6 436.52                                    | 6 568.41                                     |

# Sorghum: Price Movements

## CBOT International prices

### FOB Month on month:

|                     | 2022/10/11  | % Month<br>on Month | 2022/09/13  |
|---------------------|-------------|---------------------|-------------|
|                     | Price<br>\$ |                     | Price<br>\$ |
| US Gulf             | 367.00      | 2.23                | 359.00      |
| Argentina, Up River | 285.00      | 0.00                | 285.00      |

### FOB Year on year:

|                     | 2022/10/11  | % Year<br>on Year | 2021/10/12  |
|---------------------|-------------|-------------------|-------------|
|                     | Price<br>\$ |                   | Price<br>\$ |
| US Gulf             | 367.00      | 24.83             | 294.00      |
| Argentina, Up River | 285.00      | 18.75             | 240.00      |

Source: CBOT



# Sorghum: Grain Imports SARS FOB Prices

(2022/23: Progr. 1 Mar – 31 Aug '22)

| <b>GRAIN SORGHUM</b><br><b>1007.90</b><br><b>March - February</b> |                      | <b>2020/21</b> | <b>2021/22</b> | <b>2022/23</b><br><b>Progr.</b><br><b>Mar - Aug '22</b> |
|---|----------------------|----------------|----------------|---|
| <b>Imports</b>  | Quantity<br>(Ton)    | 7 153          | 4 454          | 480   |
| <b>Total value of imports</b>                                     | FOB value<br>(R'000) | 23 644.08      | 14 421.02      | 2 294.69  |
| <b>Value per ton</b>  | R/Ton                | 3 305.70       | 3 237.62       | 4 776.13  |

Source: SARS

*SAGIS: 380 t*



# Sorghum: Grain Imports per country – SARS FOB Prices

(2022/23: Progr. 1 Mar – 31 Aug '22)

| Imports      |                   | Tariff Line 1007.90 Grain sorghum - Other |                 |
|--------------|-------------------|---|-----------------|
| Country      | Quantity<br>(Ton) | FOB value<br>(R'000)                      | R/Ton           |
| Botswana     | 387.000           | 1 804.74                                  | 4 663.42        |
| Eswatini     | 0.003             | 0.13                                      | 40 000.00       |
| France       | 2.500             | 31.90                                     | 12 760.40       |
| Malawi       | 49.000            | 169.24                                    | 3 453.84        |
| Uganda       | 0.045             | 0.03                                      |                 |
| Ukraine      | 41.900            | 288.64                                    | 6 888.78        |
| <b>Total</b> | <b>480.448</b>    | <b>2 294.69</b>                           | <b>4 776.13</b> |

Source: SARS



# Sorghum: Grain Exports SARS FOB Prices

(2022/23: Progr. 1 Mar – 31 Aug '22)

| <b>GRAIN SORGHUM</b><br><b>1007.90</b><br><b>March - February</b> |                      | <b>2020/21</b> | <b>2021/22</b> | <b>2022/23</b><br><b>Progr.</b><br><b>Mar - Aug '22</b> |
|---|----------------------|----------------|----------------|---|
| <b>Exports</b>  | Quantity<br>(Ton)    | 7 082          | 9 404          | 7 813   |
| <b>Total value of exports</b>                                     | FOB value<br>(R'000) | 41 925.32      | 41 925.32      | 36 462.70   |
| <b>Value per ton</b>  | R/Ton                | 5 919.61       | 4 458.27       | 4 666.83  |

Source: SARS

*SAGIS: 5 621 t (Whole Sorghum)*





# Sorghum: Grain Exports per country – SARS FOB Prices (2022/23: Progr. 1 Mar – 31 Aug '22)

Exports      Tariff Line 1007.90 Grain sorghum - Other

| Country      | Quantity<br>(Ton) | FOB value<br>(R'000) | R/Ton           |
|--------------|-------------------|----------------------|-----------------|
| Botswana     | 6 512.335         | 30 256.91            | 4 646.09        |
| Eswatini     | 1 080.748         | 4 934.67             | 4 565.98        |
| Etiopia      | 0.006             | 0.31                 | 51 000.00       |
| Germany      | 0.013             | 0.30                 | 22 556.39       |
| Lesotho      | 21.500            | 114.10               | 5 306.98        |
| Mozambique   | 2.930             | 36.90                | 12 594.54       |
| Namibia      | 122.689           | 710.63               | 5 792.11        |
| Netherlands  | 0.006             | 0.10                 | 16 666.67       |
| Nigeria      | 0.080             | 2.05                 | 25 575.00       |
| Unknown      | 72.840            | 405.99               | 5 573.71        |
| Zimbabwe     | 0.020             | 0.75                 | 37 400.00       |
| <b>Total</b> | <b>7 813.167</b>  | <b>36 462.70</b>     | <b>4 666.83</b> |

Source: SARS



# General



# Sorghum: Inspection

(1 Mar – 30 Sep '22)

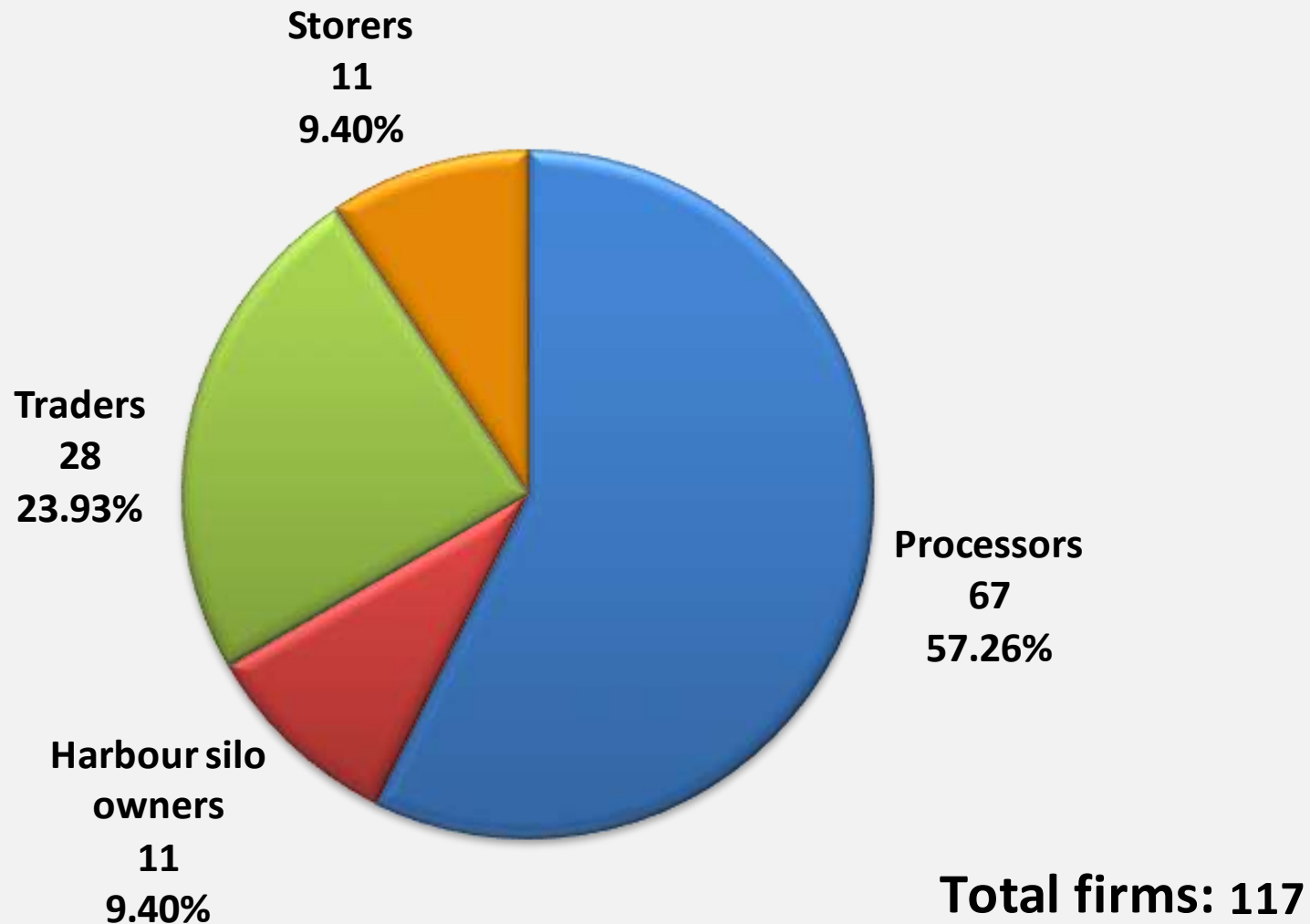


| March - September |                    |           |                     |           |                               |           |                        |               |  |            |                                       |          |
|-------------------|--------------------|-----------|---------------------|-----------|-------------------------------|-----------|------------------------|---------------|--|------------|---------------------------------------|----------|
|                   | Mass over declared |           | Mass under declared |           | Total mass declared incorrect |           | Total received audited |               | Mass declared incorrect as % of total received |            | Net effect of (under) / over declared |          |
|                   | Ton                |           | Ton                 |           | Ton                           |           | Ton                    |               | %  |            | Ton                                   |          |
|                   | a                  | b         | c                   | d         | e                             | f         | g                      | h             | e : g  | f : h      | a - c                                 | b - d    |
|                   | 2021               | 2022      | 2021                | 2022      | 2021                          | 2022      | 2021                   | 2022          | 2021   | 2022       | 2021                                  | 2022     |
| Barley            | -                  | 316       | -                   | -         | -                             | 316       | 323 368                | 250 224       | -  | 0.1        | -                                     | 316      |
| Canola            | -                  | -         | -                   | -         | -                             | -         | 159 259                | 129 794       | -  | -          | -                                     | -        |
| Groundnuts        | -                  | 522       | -                   | 518       | -                             | 1 040     | 7 810                  | 28 172        | -  | 3.7        | -                                     | 4        |
| Maize (white)     | 2 145              | 4 634     | 3 220               | 5 737     | 5 365                         | 10 371    | 1 971 079              | 2 798 619     | 0.3  | 0.4        | (1 075)                               | (1 103)  |
| Maize (yellow)    | 7 926              | 1 703     | 8 267               | 2 771     | 16 193                        | 4 474     | 1 970 984              | 1 551 635     | 0.8  | 0.3        | (341)                                 | (1 068)  |
| Oats              | -                  | -         | -                   | -         | -                             | -         | 29 588                 | 10 491        | -  | -          | -                                     | -        |
| <b>Sorghum</b>    | <b>34</b>          | <b>18</b> | <b>34</b>           | <b>18</b> | <b>68</b>                     | <b>36</b> | <b>14 150</b>          | <b>45 034</b> | <b>0.5</b>                                     | <b>0.1</b> | <b>-</b>                              | <b>-</b> |
| Soybeans          | -                  | -         | -                   | 321       | -                             | 321       | 349 667                | 832 308       | -  | -          | -                                     | (321)    |
| Sunflower         | 89                 | -         | 95                  | -         | 184                           | -         | 209 838                | 501 433       | 0.1  | -          | (6)                                   | -        |
| Wheat             | 1 047              | 28        | 1 047               | 83        | 2 094                         | 111       | 2 093 687              | 2 102 599     | 0.1  | -          | -                                     | (55)     |

\* Progressive figures for the same period each year.

## Sorghum: Firms registered with SAGIS

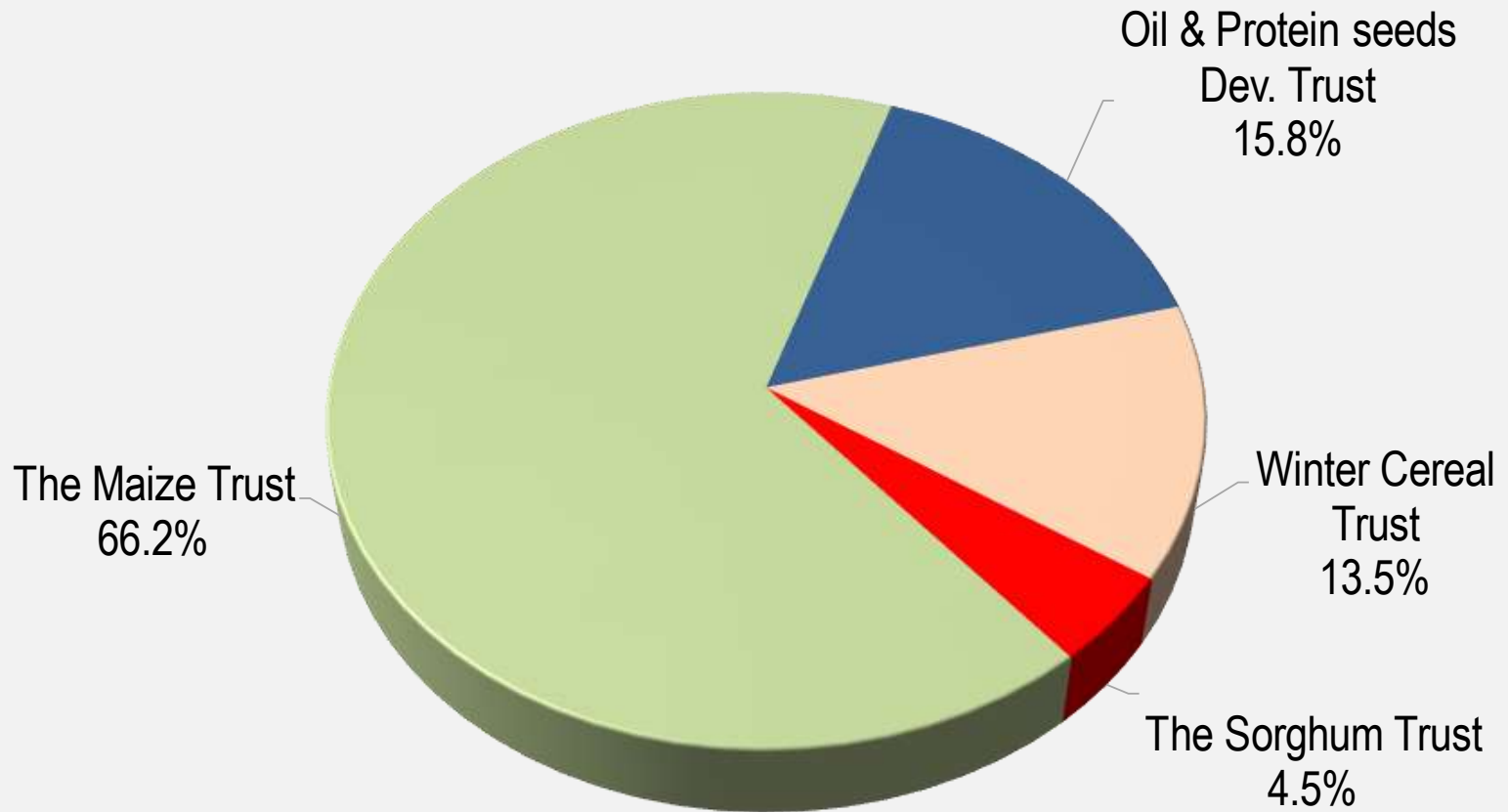
2022/23



# Sorghum: Whole grain Member basis

(2022/23 financial year)

## Member basis of subscription Whole grain & Oilseeds



# Acknowledgement

## Board of Directors

Sorghum Industry is represented by:



Mr Happy Mohane  
**Director**



Mr Willem Groothof  
**Director**



Mr Dawid Beets  
**Alternate Director**



Dr Erhard Briedenhann  
**Chairperson**

# Acknowledgement

## Gratitude

The following parties makes it possible for SAGIS to fulfil all commitments:

- Sorghum Trust
- Sorghum Forum
- Relevant Associations
- Board of Directors
- Co-workers
- Staff

The SAGIS logo features the word "SAGIS" in a bold, black, sans-serif font. The letter "i" is stylized with a green dot above it and a green vertical bar extending downwards from the top of the letter. The background of the slide is a faded image of a sorghum processing facility, showing a conveyor belt, a large truck, and a boat.

### **Note:**

The complete presentation is available on the SAGIS website under Presentations