



Sunflower & Soybean Forum

2 October 2024

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General Manager



Sunflower

Sunflower: Supply & Demand

(Year on Year)

Sunflower	Same period: March - August				
	2022	Year on year	2023	Year on year	2024 (d)
	Ton	%	Ton	%	Ton
Opening stocks	31 790	131.30	73 517	72.90	127 144
Producer deliveries	828 142	-14.40	708 757	-12.70	618 996
Imports	6 109	-11.40	5 412	-81.30	1 012
Processed (a)	434 626	-12.00	382 481	-4.90	363 892
Exports	134	-67.90	43	5 220.90	2 288
Sundries (b)	-2 227	-156.50	1 259	-430.80	-4 165
Closing stocks (c)	433 508	-6.80	403 903	-4.60	385 137

Weekly Producer deliveries: Comparison Week 1 - 30 with previous years					
Week 1 - 30	831 888	-14.60	710 588	-12.60	621 301

(a) Including producer withdrawals, seed and end users

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

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

(d) Processing for March - August 2024 represents sunflower seed processed for the local market only

Sunflower: CEC Crop Estimate vs. SAGIS Monthly Producer deliveries

Sunflower	2022/23	2023/24	2024/25
	Ton		
CEC Production	845 550	720 000	635 750 *
SAGIS Deliveries	841 784	721 752	618 996 **
Difference	3 766	-1 752	16 754

* Eighth production estimate

** SAGIS: Aug '24

Sunflower: Imports for RSA

2024/25)

Month	Argentina	Botswana	Egypt	Malawi	Zimbabwe	Month Total	Progr. Total
Ton							
2024/03	0	0	23	0	0	23	23
2024/04	0	0	0	0	0	0	23
2024/05	42	430	0	0	0	472	495
2024/06	0	0	0	0	0	0	495
2024/07	0	312	0	30	0	342	837
2024/08	0	175	0	0	0	175	1 012
Total	42	917	23	30	0	1 012	

2024/25: Progr.

Source: SAGIS

Sunflower: Processed

(Same period previous year)

Sunflower Processed	2023/24 *		2024/25 **	
	Firms	Tons	Firms	Tons
Human Consumption	2	979	2	763
Animal Feed	53	2 709	46	2 704
Oil and Oilcake	9	376 830	8	361 131
	64	380 518	56	364 598

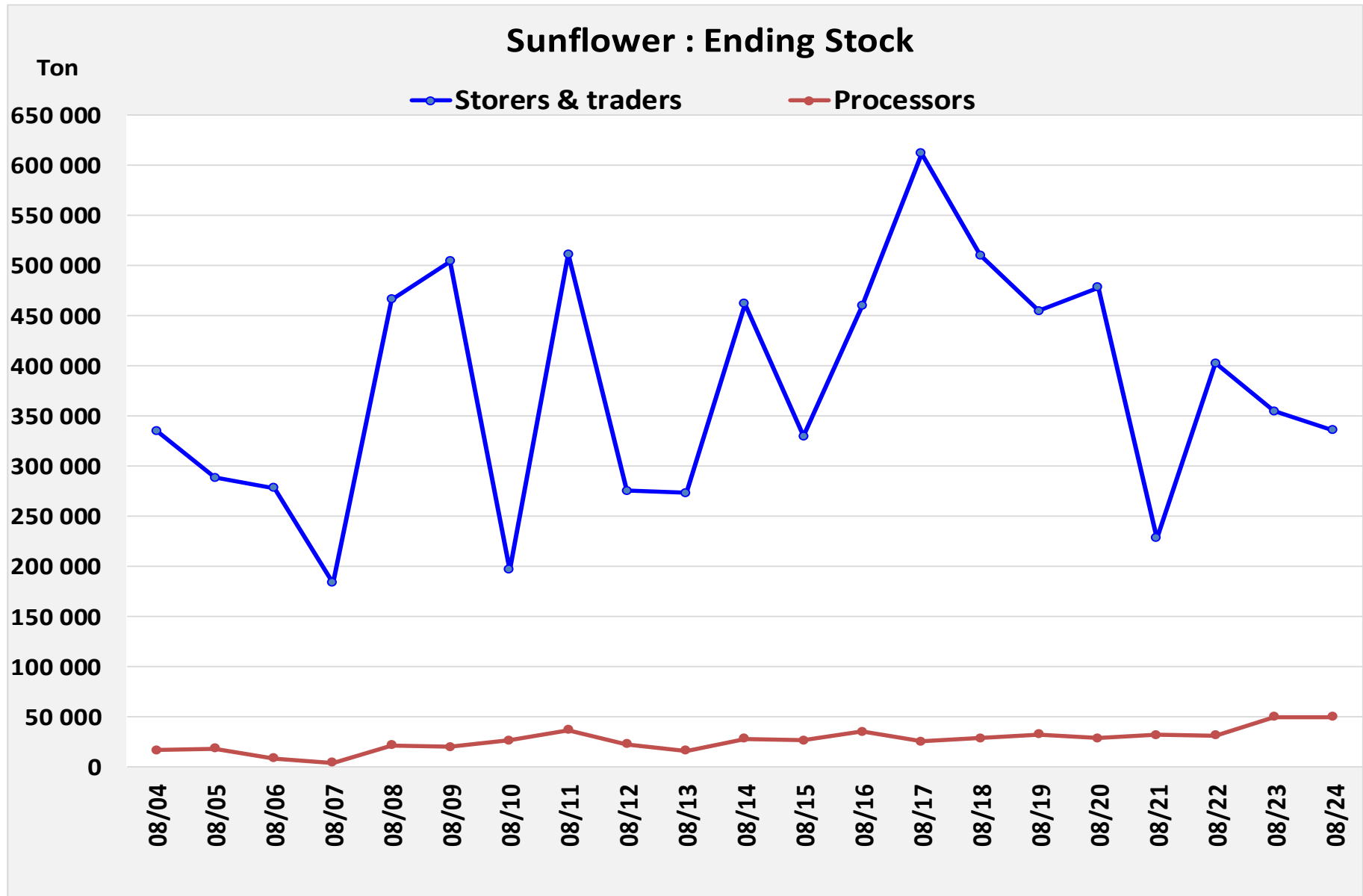
* 2023/24: Mar - Aug '23

Source: SAGIS

** 2024/25: Mar - Aug '24

Note: Total processing. Includes local market and product equivalent exported

Sunflower: Ending stock





Soybeans

Soybeans: Supply & Demand

(Year on Year)

Soybeans	Same period: March - August				
	2022	Year on year	2023	Year on year	2024 (d)
	Ton	%	Ton	%	Ton
Opening stocks	1 481 195	-88.40	171 897	86.50	320 637
Producer deliveries	19 467	13461.90	2 640 100	-35.10	1 714 035
Imports	1 540	-30.60	1 069	-55.80	472
Processed (a)	175 548	480.40	1 018 920	-6.80	949 480
Exports	34 154	546.40	220 759	-26.70	161 836
Sundries (b)	-165	-209.10	180	356.10	821
Closing stocks (c)	1 292 665	21.70	1 573 207	-41.30	923 007
Weekly Producer deliveries: Comparison Week 1 - 30 with previous years					
Week 1 - 30	2 131 956	24.90	2 663 656	-35.20	1 725 855

(a) Including producer withdrawals, seed and end users

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

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

(d) Processing for March - August 2024 represents soybeans processed for the local market only

Soybeans: CEC Crop estimate vs. SAGIS Producer deliveries

Soybeans	2022/23	2023/24	2024/25
	Ton		
CEC Production	2 230 000	2 770 000	1 810 790 *
Less Retentions	42 000	49 000	46 000
Total available	2 188 000	2 721 000	1 764 790
SAGIS Deliveries	2 186 711	2 726 389	1 714 035 **
Difference	1 289	-5 389	50 755

* Eighth production estimate

** SAGIS: Aug '24

Whole Soybeans: RSA Exports (2024/25)

Soybeans: RSA Exports

Month	Botswana	Eswatini	Mozam- bique	Vietnam	Zimbabwe	Month Total	Progressive Total
Ton							
2024/03	0	0	211	27 658	1 336	29 205	29 205
2024/04	209	0	201	0	6 532	6 942	36 147
2024/05	1 239	0	206	0	5 547	6 992	43 139
2024/06	66	69	206	0	10 308	10 649	53 788
2024/07	0	140	0	0	7 712	7 852	61 640
2024/08	0	0	0	0	12 581	12 581	74 221
Total	1 514	209	824	27 658	44 016	74 221	

2024/25: Progr.

Source: SAGIS

Soybeans: Processed

(Same time previous year)

Soybeans Processed	2023/24 *		2024/25 **	
	Firms	Tons	Firms	Tons
Human Consumption	12	10 384	11	11 595
Animal Feed	32	94 007	35	61 490
Oil and Oilcake	16	905 840	15	956 066
	60	1 010 231	61	1 029 151

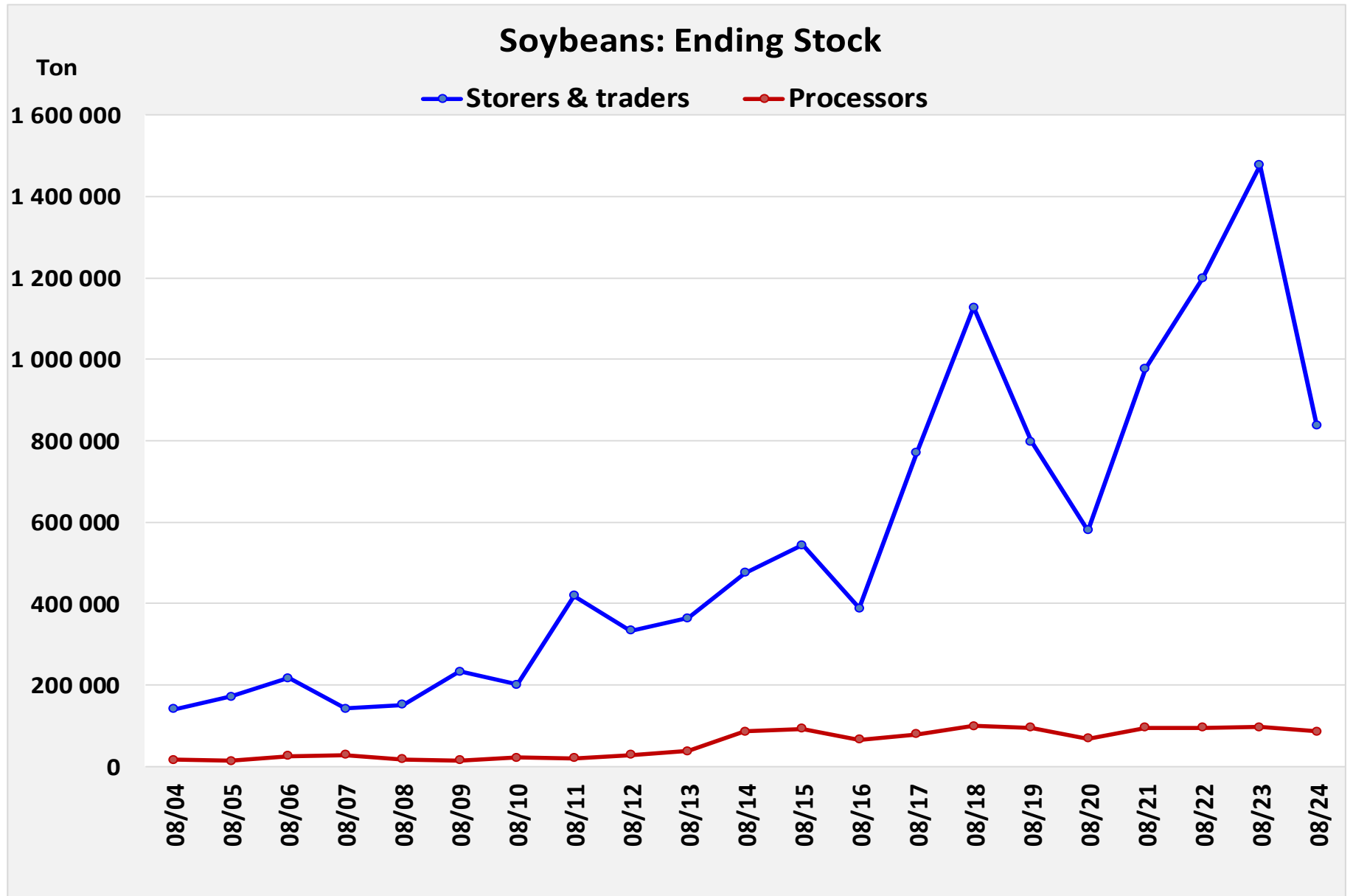
* 2023/24: Mar - Aug '23

Source: SAGIS

** 2024/25: Mar - Aug '24

Note: Total processing. Including local market and product equivalent exported

Soybeans: Ending stock





Oilseeds Products

Oilseeds: Products Manufactured

Oilseeds Manufactured	Mar '22 - Feb '23 (12 months)	% Y/Y	Mar '23 - Feb 24 (12 months)	Mar '24 - Jul '25 Progr. (5 months)
	Tons			
Palm Oil and Derivatives	0		0	0
Soybean Oil	287 762	8.08	311 007	139 620
Sunflower Oil	295 476	-14.20	253 507	113 662
Coconut Oil / Groundnut Oil / Canola Oil / Corn (Maize) Oil / Blends or mixes of Oils which includes one of the above Oils / Biodiesel / Cottonseed Oil	67 862	19.08	80 812	35 546
Sunflower Oilcake	319 018	-15.58	269 302	123 025
Coconut Oilcake	0		0	0
Palmnut Oilcake	0		0	0
Soybean Oilcake / Canola Oilcake / Cottonseed Oilcake	1 379 161	7.08	1 476 779	653 325
Soybean Flours and Meals / Textured Vegetable Protein	41 726	20.97	50 478	20 678
Soybean Fullfat	173 986	-12.05	153 025	47 816
Peanut Butter and Paste	30 519	0.74	30 744	13 516
Total	2 595 510	1.16	2 625 654	1 147 188

Price Movements

Products: Year on year price changes

Food prices		August				
		2022	% Year on Year	2023	% Year on Year	2024
		Price R		Price R		Price R
Tub Margarine spread	500g	34.59	10.09	38.08	3.86	39.55
Brick Margarine	500g	29.36	-6.10	27.57	8.20	29.83
Peanut Butter	400g	37.22	8.14	40.25	17.47	47.28
Sunflower Oil	750ml	44.51	-20.42	35.42	-1.50	34.89

Source: SA Statistics



The South Africa I know, the home I understand



General

Sunflower & Soybean: Inspection

Physical stock declared incorrect (Mar – Aug)

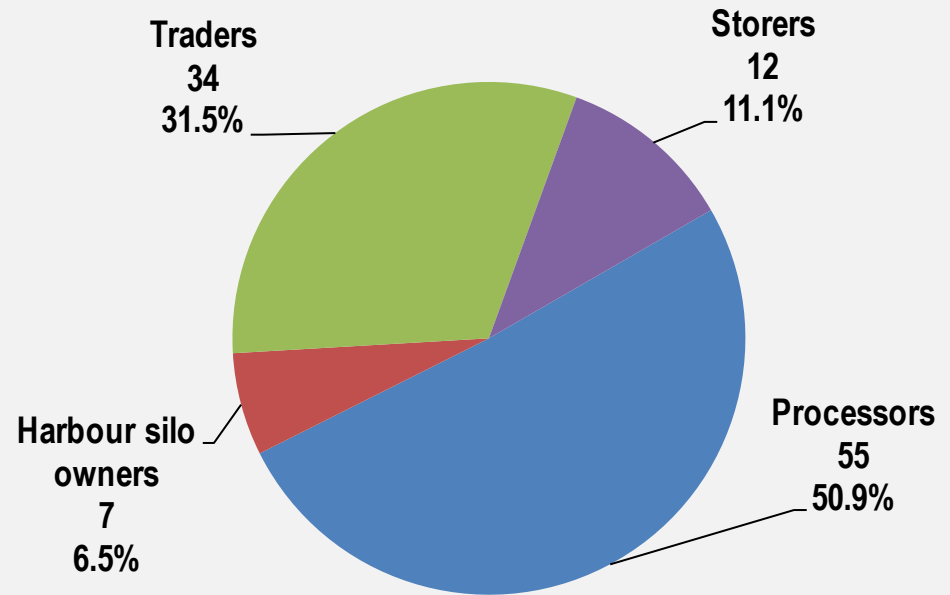
Difference between stock counted and declared on returns								
March - August								
	Under declared		Over declared		Under declared		Over declared	
	Ton				%			
	2023	2024	2023	2024	2023	2024	2023	2024
Barley	-	-	624	419	-	-	2.11	2.40
Canola	286	-	-	-	1.01	-	-	-
Groundnuts	-	-	3 388	11	-	-	22.24	0.15
Maize (white)	2 078	-	-	4 287	-	-	-	0.72
Maize (yellow)	9 335	-	-	1 463	1.88	-	-	0.15
Oats	-	-	-	5	-	-	-	1.79
Sorghum	10	116	-	-	0.19	0.49	-	-
Soybeans	-	-	656	1 719	-	-	0.81	0.69
Sunflower	1 231	-	-	2 343	3.59	-	-	2.82
Wheat	-	-	3 391	743	-	-	1.73	0.33
	12 940	116	8 059	10 990	1.05	0.01	0.66	0.50

* Progressive figures for the same period each year.

Facility type	Sunflower	Soybeans
Cement & Steel	67.00%	68.60%
Other (Silo bags, Stores, Bunkers, Dams)	33.00%	31.40%

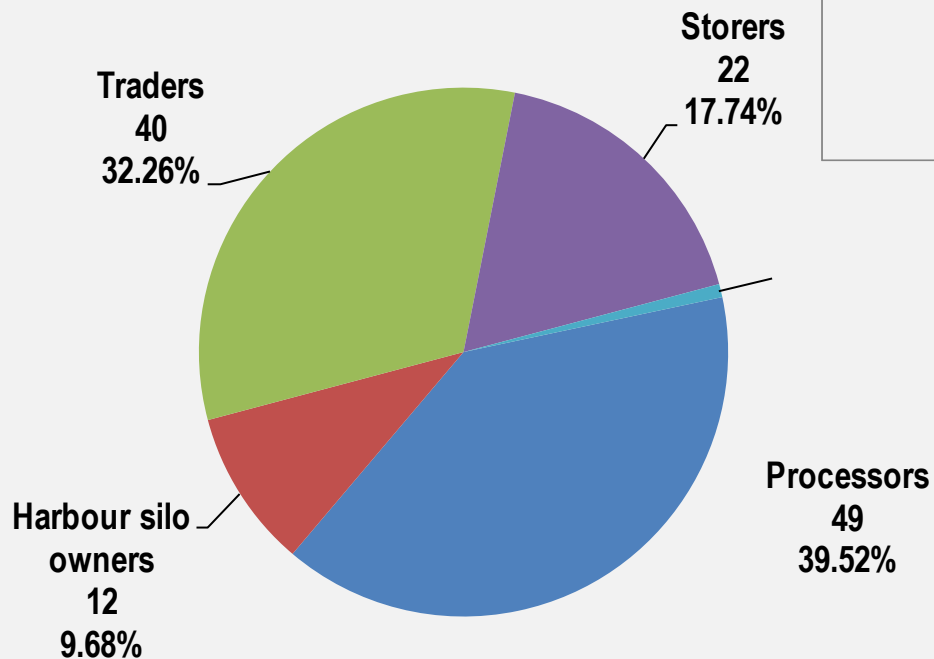
Sunflower & Soybean: Co-workers registered

Sunflower: Firms registered



Total firms: 108

Soybeans: Firms registered



Total firms: 124

Acknowledgement

Gratitude

The following parties makes it possible for SAGIS to fulfil its 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 website of
SAGIS under Presentations