



National Agricultural
Marketing Council

Promoting market access for South African agriculture

The NAMC, Maize Trust, Oil and Protein Seeds Development Trust, Sorghum Trust and Winter Cereal Trust jointly fund the Grain and Oilseeds Supply & Demand Estimates (S&DE) initiative.

South African Supply and Demand Estimates November 2019 Report

GRAIN & OILSEEDS SUPPLY & DEMAND ESTIMATES COMMITTEE (S&DEC)

SASDE – 78th meeting, 29th of November 2019

THE SOUTH AFRICAN SUPPLY AND DEMAND PROJECTIONS FOR GRAINS AND OILSEEDS FOR
November 2019 ARE AS FOLLOWS:

WHITE MAIZE (2019/20 Season)

Supply: The total supply of white maize is projected at 7 221 340 tons for the 2019/20 marketing season. This includes an opening stock level (at 1 May 2019) of 1 798 998 tons and local commercial deliveries of 5 378 240 tons. No whole white maize imports are estimated for the current season, with net early deliveries of 34 102 tons and a surplus of 10 000 tons.

Demand: The total demand (domestic plus exports) for white maize is projected at 6 069 000 tons. The total domestic demand is projected at 5 319 000 tons. This includes 4 670 000 tons processed for human consumption, 600 000 tons processed for animal and industrial consumption, 11 000 tons for gristing, 15 000 tons withdrawn by producers, 19 000 tons released to end-consumers and a balancing figure of 4 000 tons (net receipts and net dispatches). A projected export quantity of 90 000 tons of processed products and 660 000 tons of white whole maize is estimated for exports for the 2019/20 marketing season.

(Please note: When utilizing 45 days' stock as a proxy, there is potential for 1 025 000 tons of white maize available for exports for the 2019/20 marketing season. The S&DEC take cognizance of the maize requirements for countries north of South Africa).

Stock levels: The projected closing stock level at 30 April 2020 is estimated at 1 152 340 tons. At an average processed quantity of 440 083 tons per month, this represent available stock levels for 2.6 months or 80 days.

YELLOW MAIZE (2019/20 Season)

Supply: The total supply of yellow maize is projected at 6 816 653 tons for the 2019/20 marketing season. This includes an opening stock (at 1 May 2019) of 864 088 tons and local commercial deliveries of 5 369 610 tons. Yellow maize imports of 550 000 tons are estimated for the current season, early deliveries of 18 955 tons and a surplus of 14 000 tons.

Demand: The total demand (domestic plus exports) for yellow maize is projected at 6 276 500 tons. The total domestic demand is projected at 5 796 500 tons. This includes 580 000 tons processed for human consumption, 5 050 000 tons processed for animal and industrial consumption, 11 500 tons for gristing, 40 000 tons withdrawn by producers, 105 000 tons released to end-consumers and a balancing figure of 10 000 tons (net receipts and net dispatches). A projected export quantity of 130 000 tons of processed products and 350 000 tons of yellow whole maize is estimated for exports for the 2019/20 marketing season.

Stock levels: The projected closing stock level at 30 April 2020 is estimated at 540 153 tons. At an average processed quantity of 470 125 tons per month, this represent available stock levels for 1.1 months or 35 days.

TOTAL MAIZE (2019/20 Season)

Supply: The total supply of maize is projected at 14 037 993 tons for the 2019/20 marketing season. This includes an opening stock (at 1 May 2019) of 2 663 086 tons and local commercial deliveries of 10 747 850 tons. Whole maize imports of 550 000 tons are estimated, with early deliveries of 53 057 tons and a surplus of 24 000 tons.

Demand: The total demand (domestic plus exports) for maize is projected at 12 345 500 tons. The total domestic demand is projected at 11 115 500 tons. This includes 5 250 000 tons processed for human consumption, 5 650 000 tons processed for animal and industrial consumption, 22 500 tons for gristing, 55 000 tons withdrawn by producers, 124 000 tons released to end-consumers and a balancing figure of 14 000 tons (net receipts and net dispatches). A projected export quantity of 220 000 tons of processed products and 1 010 000 tons of total whole maize is estimated for exports for the 2019/20 marketing season.

Stock levels: The projected closing stock level at 30 April 2020 is estimated at 1 692 493 tons. At an average processed quantity of 910 208 tons per month, this represents available stock levels for 1.9 months or 57 days.

See [Appendix 1](#) for detailed S&D table. An explanation of terms and calculations is available on the NAMC website (<http://www.namc.co.za>).

SWEET SORGHUM (2019/20 Season)

Supply: The total supply of sweet sorghum is projected at 166 769 tons for the 2019/20 marketing season. This includes an opening stock level (at 1 March 2019) of 34 954 tons, local commercial deliveries of 90 115 tons, imports of 41 000 tons for South Africa and a sweet sorghum surplus of 700 tons.

Demand: The total demand (domestic plus exports) for sweet sorghum is projected at 135 750 tons. This includes 1 000 tons for indoor malting, 18 000 tons for floor malting, 100 000 tons for meal, rice and grits, 8 650 tons for feed, 800 tons withdrawn by producers, 800 tons released to end consumers, and a balancing figure of 500 tons (net receipts and net dispatches). A projected export quantity of 6 000 tons of sweet sorghum is estimated for exports for the 2019/20 marketing season.

Stock levels: The projected closing stock level at 28 February 2020 is estimated at 31 019 tons. At an average processed quantity of 10 638 tons per month, this represent available stock levels for 2.9 months or 89 days.

BITTER SORGHUM (2019/20 Season)

Supply: The total supply of bitter sorghum is projected 57 366 tons for the 2019/20 marketing season. This includes an opening stock level (at 1 March 2019) of 16 906 tons, local commercial deliveries of 40 260 tons, no bitter sorghum imports and a surplus of 200 tons for South Africa.

Demand: The total demand (domestic plus exports) for bitter sorghum is projected at 48 005 tons. This includes 9 600 tons for indoor malting, 33 000 tons for floor malting, 2 500 tons for meal, rice and grits, 1 005 tons for feed, 400 tons withdrawn by producers, 50 tons released to end consumers, a balancing figure of 150 tons (net receipts and net dispatches), and a zero deficit. A projected export quantity of 1 300 tons of bitter sorghum is estimated for exports for the 2019/20 marketing season.

Stock levels: The projected closing stock level at 28 February 2020 is estimated at 9 361 tons. At an average processed quantity of 3 842 tons per month, this represent available stock levels for 2.4 months or 74 days.

TOTAL SORGHUM (2019/20 Season)

Supply: The total supply of sorghum is projected at 224 135 tons for the 2019/20 marketing season. This includes an opening stock level (at 1 March 2019) of 51 860 tons, local commercial deliveries of 130 375 tons, sorghum imports of 41 000 tons for South Africa with a surplus of 900 tons.

Demand: The total demand (domestic plus exports) for sorghum is projected at 183 755 tons. This includes 10 600 tons for indoor malting, 51 000 tons for floor malting, 102 500 tons for meal, rice and grits, 9 655 tons for feed, 1 200 tons withdrawn by producers, 850 tons released to end consumers, a balancing figure of 650 tons (net receipts and net dispatches), and a zero deficit. A projected export quantity of 7 300 tons of total sorghum is estimated for exports for the 2019/20 marketing season.

Stock levels: The projected closing stock level at 28 February 2020 is estimated at 40 380 tons. At an average processed quantity of 14 480 tons per month, this represent available stock levels for 2.8 months or 85 days.

See [Appendix 2](#) for detailed S&D table.

WHEAT (2019/20 Season)

Supply: The total supply of wheat is projected at 3 880 539 tons for the 2019/20 marketing season. This includes an opening stock level (at 1 October 2019) of 539 079 tons, local commercial deliveries of

1 583 460 tons, whole wheat imports estimated for South Africa of 1 750 000 tons and a surplus of 8 000 tons.

Demand: The total demand (domestic plus exports) for wheat is projected at 3 408 300 tons. This includes 3 270 000 tons processed for human consumption, 3 000 tons processed for animal consumption, 1 000 tons withdrawn by producers, 2 100 tons released to end consumers, 20 000 tons projected seed for planting purposes and a balancing figure of 4 200 tons (net receipts and net dispatches). A projected export quantity of 13 000 tons processed products and 95 000 tons whole wheat is estimated for exports for the 2019/20 marketing season.

Stock levels: The projected closing stock level at 30 September 2020 is estimated at 472 239 tons. At an average processed quantity of 272 750 tons per month, this represent available stock levels for 1.7 months or 53 days.

See [Appendix 3](#) for detailed S&D table.

SUNFLOWER SEED (2019/20 Season)

Supply: The total supply of sunflower seed is projected at 827 105 tons for the 2019/20 marketing season. This includes an opening stock level (at 1 March 2019) of 120 165 tons, local commercial deliveries of 680 940 tons, sunflower seed imports of 40 000 tons for South Africa and a surplus of 6 000 tons.

Demand: The total demand (domestic plus exports) for sunflower seed is projected at 734 300 tons. This includes 1 550 tons processed for human consumption, 5 800 tons processed for animal consumption, 720 000 tons for crush (oil and oilcake), 750 tons withdrawn by producers, 1 100 tons released to end consumers, 3 000 tons seed for planting purposes and a balancing figure of 1 500 tons (net receipts and net dispatches). A quantity of 600 tons is estimated for exports for the 2019/20 marketing season.

Stock levels: The projected closing stock level at 28 February 2020 is estimated at 92 805 tons. At an average processed quantity of 60 613 tons per month, this represents available stock levels for 1.5 months or 47 days.

See [Appendix 4](#) for detailed S&D table.

SOYBEANS (2019/20 Season)

Supply: The total supply of soybeans is projected at 1 655 086 tons for the 2019/20 marketing season. This includes an opening stock level (at 1 March 2019) of 502 241 tons, local commercial deliveries of 1 140 345 tons, soybean import of 9 500 tons for South Africa and a surplus of 3 000 tons.

Demand: The total demand (domestic plus exports) for soybeans is projected at 1 463 950 tons. This includes 25 000 tons processed for human consumption, 215 000 tons processed for animal (full fat) consumption, 1 210 000 tons for crush (oil and oilcake), 750 tons withdrawn by producers, 450 tons released to end consumers, 8 000 tons seed for planting purposes, and a balancing figure of 750 tons (net receipts and net dispatches). A quantity of 4 000 tons soybeans is estimated for exports for the 2019/20 marketing season.

Stock levels: The projected closing stock level at 28 February 2020 is estimated at 191 136 tons. At an average processed quantity of 120 833 tons per month, this represents available stock levels for 1.6 months or 48 days.

See *Appendix 5* for detailed S&D table.

PLEASE NOTE: The December 2019 SASDE Report will be released on the 14th of January 2020.

Appendix 1: Detailed S & D table for White, Yellow and Total Maize - November 2019

		White Maize		Yellow Maize		Total Maize	
	Marketing season	Final for 2018/19	Projection for 2019/20	Final for 2018/19	Projection for 2019/20	Final for 2018/19	Projection for 2019/20
		tons	tons	tons	tons	tons	tons
1	CEC (Crop Estimate)	6,540,000	5,538,240	5,970,000	5,719,610	12,510,000	11,257,850
2	CEC (Retention)	0	160,000	0	350,000	0	510,000
3	Min: Early deliveries for current season (March + April)*	0	85,898	0	181,045	0	266,943
4	Plus: Early deliveries for next season (March + April)*	0	120,000	0	200,000	0	320,000
5	Available for the commercial market	6,540,000	5,412,342	5,970,000	5,388,565	12,510,000	10,800,907
6 SUPPLY							
7	Opening stock (1 May)	2,428,653	1, 798,998	1,260,823	864,088	3,689,476	2,663,086
8	Producer deliveries	6,308,941	5, 378,240	5,674,911	5,369,610	11,983,852	10,747,850
9	Imports for South Africa	0	0	171,622	550,000	171,622	550,000
10	Early deliveries (Net)	0	34,102	0	18,955	0	53,057
11	Surplus	1,403	10,000	20,770	14,000	22,173	24,000
12	Total Supply	8,738,997	7,221,340	7,128,126	6,816,653	15,867,123	14,037,993
13 DEMAND							
14	Processed for the local market	6,283,320	5,281,000	4,407,657	5,641,500	10,690,977	10,922,500
15	- human	4,594,123	4,670,000	566,649	580,000	5,160,772	5,250,000

		White Maize		Yellow Maize		Total Maize	
	Marketing season	Final for 2018/19	Projection for 2019/20	Final for 2018/19	Projection for 2019/20	Final for 2018/19	Projection for 2019/20
		tons	tons	tons	tons	tons	tons
16	- animal and industrial	1,677,236	600,000	3,829,944	5,050,000	5,507,180	5,650,000
17	- gristing	11,961	11,000	11,064	11,500	23,025	22,500
18	Withdrawn by prod	12,844	15,000	51,420	40,000	64,264	55,000
19	Released to end-cons	22,946	19,000	128,697	105,000	151,643	124,000
20	Net receipts(-)/disp(+)	4,238	4,000	8,857	10,000	13,095	14,000
21	Deficit	0	0	0	0	0	0
22	Local demand	6,323,348	5,319,000	4,596,631	5,796,500	10,919,979	11,115,500
23	Exports	616,651	750,000	1,667,407	480,000	2,284,058	1,230,000
24	- products	72,280	90,000	141,312	130,000	213,592	220,000
25	- whole maize	544,371	660,000	1,526,095	350,000	2,070,466	1,010,000
26	Total Demand	6,939,999	6,069,000	6,264,038	6,276,500	13,204,037	12,345,500
27	Closing Stock (30 Apr)	1,798,998	1,152,340	864,088	540,153	2,663,086	1,692,493
28	- processed p/month	523,610	440,083	367,305	470,125	890,915	910,208
29	- months' stock	3.4	2.6	2.4	1.1	3.0	1.9
30	- days' stock	105	80	72	35	91	57
<p><i>*For the current marketing season early deliveries of maize which occurred during January and February 2019, are included in the 2019/20 seasons' estimate (as per CEC estimates).</i></p>							

Appendix 2: Detailed S & D table for Sorghum - November 2019

		Sweet Sorghum		Bitter Sorghum		Total Sorghum	
	Marketing season	Final for 2018/19	Projection for 2019/20	Final for 2018/19	Projection for 2019/20	Final for 2018/19	Projection for 2019/20
		tons	tons	tons	tons	tons	tons
1	CEC (Crop Estimate)	65,150	90, 515	49,850	40,360	115,000	130,875
2	CEC Retentions	300	400	150	100	450	500
3	Available for the commercial market	64,850	90, 115	49,700	40,260	114,550	130,375
4	SUPPLY						
5	Opening stock (1 Mch)	31,211	34,954	28,035	16,906	59,246	51,860
6	Prod deliveries	64,887	90,115	50,507	40,260	115,394	130,375
7	Imports for South Africa	43, 620	41,000	2,119	0	45,739	41,000
8	Surplus	2, 955	700	0	200	2,955	900
9	Total Supply	142,673	166,769	80,661	57,366	223,334	224,135
10	DEMAND						
11	Processed	99,131	127,650	55,613	46,105	154,744	173,755
12	- Indoor malting	618	1,000	9,121	9,600	9,739	10,600
13	- Floor malting	10,569	18,000	36,044	33,000	46,613	51,000
14	- Meal, rice & grits	79,316	100,000	8,399	2,500	87,715	102,500
15	- Pet Food	850	750	0	5	850	755
16	- Poultry feed	5,615	5,900	985	800	6,600	6,700
17	- Livestock feed	2,163	2,000	1,064	200	3,227	2,200

		Sweet Sorghum	
	Marketing season	Final for 2018/19	Projection for 2019/20
		tons	tons
18	Bio-fuel	0	0
19	Withdrawn by prod	644	800
20	Released to end-cons	740	800
21	Net receipts(-)/disp(+)	383	500
22	Deficit	0	0
23	Exports	6,821	6,000
24	Total Demand	107,719	135,750

		Bitter Sorghum	
	Marketing season	Final for 2018/19	Projection for 2019/20
		tons	tons
		0	0
		388	400
		26	50
		500	150
		4,567	0
		2,661	1,300
		63,755	48,005

		Total Sorghum	
	Marketing season	Final for 2018/19	Projection for 2019/20
		tons	tons
		0	0
		1,032	1,200
		766	850
		883	650
		4,567	0
		9,482	7,300
		171,474	183,755

25	Ending Stock (28/29 Feb)	34,954	31,019
26	- processed p/month	8,261	10,638
27	- months' stock	4.2	2.9
28	- days' stock	129	89

		16,906	9,361
		4,634	3,842
		3.6	2.4
		111	74

		51,860	40,380
		12,895	14,480
		4.0	2.8
		122	85

Appendix 3: Detailed S & D table for Wheat - November 2019

		Wheat	
	Marketing season	Final for 2018/19	Projection for 2019/20
		tons	tons
1	CEC (Crop Estimate)	1,868,000	1,618,460
2	CEC (Retention)	33,000	35,000
3	SUPPLY		
4	Opening stock (1 Oct)	721,534	539,079
5	Prod deliveries	1,847,134	1,583,460
6	Imports for South Africa	1,369,380	1,750,000
7	Surplus	11,989	8,000
8	Total Supply	3,950,037	3,880,539
9	DEMAND		
10	Processed	3,265,339	3,273,000
11	- human	3,262,158	3,270,000
12	- animal	3,181	3,000
13	- gristing	0	0
14	Withdrawn by producers	1,005	1,000
15	Released to end-consumers	2,188	2,100
16	Seed for planting purposes	19,222	20,000
17	Net receipts(-)/disp(+)	2,151	4 200
18	Deficit	0	0
19	Exports	118,312	108,000
20	- products	10,055	13,000
21	- whole wheat	108,257	95,000
22	Total Demand	3,408,217	3,408,300
23	Closing Stock (30 Sep)	541,820	472,239
24	- processed p/month	272,112	272,750
25	- months' stock	2.0	1.7
26	- days' stock	61	53

Appendix 4: Detailed S & D table for Sunflower Seed – November 2019

		Sunflower Seed	
	Marketing season	Final for 2018/19	Projection for 2019/20
		tons	tons
1	CEC (Crop Estimate)	862,000	680,940
2	SUPPLY		
3	Opening stock (1 Mch)	154,841	120,165
4	Prod deliveries	863,184	680,940
5	Imports for South Africa	1,324	40,000
6	Surplus	6,863	6,000
7	Total Supply	1,026,212	827,105
8	DEMAND		
9	Processed	900,045	727,350
10	- human	1,609	1,550
11	- animal	5,114	5,800
12	- crush (oil and oilcake)	893,322	720,000
13	Withdrawn by producers	519	750
14	Released to end-consumers	1,764	1,100
15	Seed for planting purposes	3,582	3,000
16	Net receipts(-)/disp(+)	-378	1,500
17	Deficit	0	0
18	Exports	515	600
19	Total Demand	906,047	734,300
20	Ending Stock (28/29 Feb)	120,165	92,805
21	- processed p/month	75,004	60,613
22	- months' stock	1.6	1.5
23	- days' stock	49	47

Appendix 5: Detailed S & D table for Soybeans – November 2019

		Soybeans	
	Marketing season	Final for 2018/19	Projection for 2019/20
		tons	tons
1	CEC (Crop Estimate)	1,540,000	1,170,345
2	Retention	0	30,000
3	SUPPLY		
4	Opening stock (1 Mch)	330,535	502,241
5	Prod deliveries	1,502,976	1,140,345
6	Imports for South Africa	6,945	9,500
7	Surplus	4,497	3,000
8	Total Supply	1,844,953	1,655,086
9	DEMAND		
10	Processed	1,298,544	1,450,000
11	- human	25,005	25,000
12	- animal feed (full fat soya)	218,973	215,000
13	- crush (oil/oilcake)	1,054,566	1,210,000
14	Withdrawn by producers	567	750
15	Released to end-consumers	431	450
16	Seed for planting purposes	10,599	8,000
17	Net receipts(-)/disp(+)	-239	750
18	Deficit	0	0
19	Exports	32,810	4,000
20	Total Demand	1,342,712	1,463,950
21	Closing Stock (28/29 Feb)	502,241	191,136
22	- processed p/month	108,212	120,833
23	- months' stock	4.6	1.6
24	- days stock	141	48

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Compiled by the South African Grain & Oilseeds Supply & Demand Estimates Committee

Enquiries: Dr Abongile Balarane

+27(0)12 341 1115/+27(0)76 752 4846

abalarane@namc.co.za

Dr Christo Joubert

+27(0)12 341 1115/+27(0)76 999 7766

christo@namc.co.za

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