

Grain SA : S&D Projections / Wintergrain

Opgedateer / Updated
28-May-24

GSA's projections for the 2024/25 marketing season are based on the CEC's intentions to plant for wintergrains



Disclaimer: *Everything has been done to ensure the accuracy of this information, however Grain SA takes no responsibility for any losses or damage occurred due to the usage of this information.*

**DIE VRAAG-EN-AANBOD VAN KORING IN DIE RSA
THE SUPPLY AND DEMAND FOR WHEAT IN SOUTH AFRICA**

Opdateer \ Updated	GSA Projection	Scenario 1	Scenario 2	Scenario 3
28-May-24	Final CEC Estimate	Low yield	Average yield	High yield
Bemarkingsjaar / Marketing Year	2023/2024*	2024/2025*	2024/2025*	2024/2025*
<i>Oppervlak aangeplant/Area planted (x1 000 ha)</i>	538	520	520	520
<i>Opbrengs/Yield (ton/ha)</i>	3,9	3,3	3,8	4,0
<i>NOK produksie skatting/CEC crop estimate ('000ton)</i>	2078	1691	1977	2081
<i>Terughoudings en saadproduksie / Retentions and production of seed</i>	45	10	10	10
<i>Minus: vroeë lewerings 2015 / Early deliveries 2015</i>				
<i>Plus: vroeë lewerings 2016 / Early deliveries 2016</i>				
<i>Beskikbaar vir kommersiële lewerings / Available for commercial deliveries</i>	2033	1681	1967	2071
	Grain SA	Grain SA	Grain SA	Grain SA
Kommersiële aanbod / Commercial supply				
<i>Beginvoorraad (1 Oktober) / Opening stocks (1 October)</i>	563	617	617	617
<i>Kommersiële produksie / Commercial production</i>	2033	1681	1967	2071
<i>Surplus (Adjustment of the reconciliation)</i>	7	7	7	7
<i>Invoere / Imports</i>	1650	1749	1462	1358
Totale kommersiële aanbod / Total commercial supply	4253	4054	4053	4053
Kommersiële vraag / Commercial demand				
<i>Kommersiële verbruik / Commercial consumption</i>				
<i>Voedsel / Food</i>	3351	3401	3401	3401
<i>Voer / Feed</i>	19	22	22	22
Totaal / Total	3370	3423	3423	3423
<i>Ander verbruik / Other consumption</i>				
<i>Omruilmaal / Gristing</i>	0	0	0	0
<i>Onttrek deur produsente / Withdrawn by producers</i>	4	5	5	5
<i>Vrygestel aan eindverbruikers / Released to end consumers</i>	1	1	1	1
<i>Net receipts</i>	4			
<i>Saad vir plantdoeleindes / Seed for planting purposes</i>	19	19	19	19
<i>SAGIS (Nota 8)</i>	2	2		
<i>Totaal Ander verbruik / Total Other use</i>	29	27	25	25
Totaal RSA verbruik / Total RSA consumption	3399	3450	3448	3448
<i>Uitvoere / Exports</i>				
<i>Produkte / Products</i>	32	30	30	30
<i>Heelkoring / Whole wheat</i>	205	181	181	181
Totaal / Total	237	211	211	211
Totale vraag / Total demand	3636	3662	3659	3659
Eindvoorraad (30 September) / Carry-out (30 September)	617	392	394	394
<i>Benodigde pyplyn / Pipeline requirements</i>	413	419	419	419
Surplus bo pyplyn/ Surplus above pipeline	204	-27	-26	-26
% invoere t.o.v RSA verbruik/ % imported of RSA consumption	48,5%	50,7%	42,4%	39,4%
Eindvoorraad as % van RSA verbruik/ Carry-out as a % of RSA consumption	18,2%	11,4%	11,4%	11,4%
Eindvoorraad as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	17,0%	10,7%	10,8%	10,8%

*projection for new marketing year

For Projections:

Average yield: 10 Year Average

Low Yield: Lowest figure in the past 10 years

High Yield: Highest figure in the last 10 years

Imports: Balancing figure

Exports: 5 Year average

Rest of the figures: 3 Year average

For Projections:

Hectares: CEC intentions

Average yield: 5 Year Average

Low Yield: Lowest 5 yields

High Yield: Highest 5 yields

Imports: Balancing figure

Exports: 5 Year average

Human consumption: 1,5'

Animal feed: 5 Year average

Rest of the figures: 5 Year average

DIE VRAAG-EN-AANBOD VAN GARS IN DIE RSA THE SUPPLY AND DEMAND FOR BARLEY IN SOUTH AFRICA 28-May-24	GSA Projection	Scenario 1	Scenario 2	Scenario 3
	Final CEC Estimate	Low yield	Average yield	High yield
Bemarkingsjaar / Marketing Year	2023/2024*	2024/2025*	2024/2025*	2024/2025*
Oppervlak aangeplant/Area planted (ha)	107600	102 000	102 000	102 000
Opbrengs/Yield (ton/ha)	3,5	3,3	3,4	3,9
NOK produksie skatting/CEC crop estimate (ton)	376 195	338 640	346 800	394 740
Beskikbaar vir kommersiële lewerings / Available for commercial deliveries	376 195	338 640	346 800	394 740
	Grain SA	Grain SA	Grain SA	Grain SA
Kommersiële aanbod / Commercial supply				
Beginvoorraad (1 Oktober) / Opening stocks (1 October)	149 928	235 037	235 037	235 037
Kommersiële produksie / Commercial production	376 195	338 640	346 800	394 740
Invoere / Imports	187 743	-	-	-
Totale kommersiële aanbod / Total commercial supply	713 866	573 677	581 837	629 777
Kommersiële vraag / Commercial demand				
Menslik / Human	316 935	310 596	310 596	310 596
Voer / Feed	106 833	102 638	102 638	102 638
Totaal kommersieel / Total commercial consumption	423 768	413 234	413 234	413 234
Totaal Ander verbruik / Total Other use	12 960	16 320	16 320	16 320
Totaal RSA verbruik / Total RSA consumption	436 728	429 554	429 554	429 554
Uitvoere / Exports				
Heelgars / Whole barley	10 481	10 481	10 481	10 481
Produkte/Products	31 620	31 620	31 620	31 620
Totaal / Total	42 101	105 158	113 318	161 258
Totale vraag / Total demand	478 829	534 711	542 871	590 811
Eindvoorraad (30 September) / Carry-out (30 September)	235 037	38 966	38 966	38 966
Benodigde pyplyn / Pipeline requirements	52 245	50 947	50 947	50 947
Surplus bo pyplyn/ Surplus above pipeline	182 792	-11 981	-11 981	-11 981
% invoere t.o.v RSA verbruik/ % imported of RSA consumption	43%	0%	0%	0%
Eindvoorrade as % van RSA verbruik/ Carry-out as a % of RSA consumption	54%	9%	9%	9%
Eindvoorrade as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	49%	7%	7%	7%

For Projections:

Hectares: CEC intentions

Average yield: 5 Year Average

Low Yield: Lowest 5 yields in the past 10 years.

High Yield: Lowest 5 yields in the past 10 years.

Imports: Balancing figure

Exports: Previous season figure

Human consumption: -2% growth

Animal feed: 5 Year average

**DIE VRAAG-EN-AANBOD VAN HAWER IN DIE RSA/
THE SUPPLY AND DEMAND FOR OATS IN SOUTH AFRICA**

Opdateer \ Updated	GSA Projection	Scenario 1	Scenario 2	Scenario 3
28-May-24	Final CEC Estimate	Low yield	Average yield	High yield
Bemarkingsjaar / Marketing Year	2023/2024*	2024/2025*	2024/2025*	2024/2025*
Area aangeplant / Area planted	27 500	20 500	20 500	20 500
Opbrengs / Yield (ton/ha)	1,464	1,2	1,4	3,4
NOK produksie skatting / CEC crop estimate (ton)	40 250	23 985	28 085	69 085
Beskikbaar vir kommersiële lewerings / Available for commercial deliveries	40 250	23 985	28 085	69 085
	Grain SA	Grain SA	Grain SA	Grain SA
Komersiële aanbod / Commercial supply *				
Beginvoorraad (1 Oktober) / Opening stocks (1 October)	23 401	-6 678	-6 678	-6 678
Komersiële produksie / Commercial production	40 250	23 985	28 085	69 085
Invoere / Imports	399	58 156	54 056	13 056
Totale kommersiële aanbod / Total commercial supply	64 050	75 464	75 464	75 464
Komersiële vraag / Commercial demand				
Voedsel / Food	49 524	50 019	50 019	50 019
Voer / Feed	13 378	13 913	13 913	13 913
Totaal kommersieel / Total commercial consumption	62 902	63 932	63 932	63 932
Totaal Ander verbruik / Total Other use	7 759	7 115	7 115	7 115
Totaal RSA verbruik / Total RSA consumption	70 661	71 047	71 047	71 047
Uitvoere / Exports	67	119	119	119
Totale vraag / Total demand	70 728	71 166	71 166	71 166
Eindvoorraad (30 September) / Carry-out (30 September)	-6 678	4 298	4 298	4 298
Benodigde pyplyn / Pipeline requirements	7 755	7 882	7 882	7 882
Surplus bo pyplyn/ Surplus above pipeline	-14 433	-3 584	-3 584	-3 584
% invoere t.o.v RSA verbruik/ % imported of RSA consumption	1%	82%	76%	18%
Eindvoorraade as % van RSA verbruik/ Carry-out as a % of RSA consumption	-9%	6%	6%	6%
Eindvoorraade as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	-9%	6%	6%	6%

For Projections:

Hectares: CEC intentions

Average yield: 5 Year Average

Low Yield: Lowest 5 yields in the past 10 y

High Yield: Highest 5 yields in the past 10 y

Imports: Balancing figure

Exports: Previous season figure

Human consumption: 0,1% growth

Animal feed: 4% increase