Directorate: Agricultural Statistics, Private Bag X246, Pretoria, 0001

**From:** Ollen Mathole

**Tel:** 012  319 8047 **Fax:** 012  319 8031/5 **E-mail:** OllenM@nda.agric.za

Ref: 26.4.5

5 September 2008

## To all the members of the Crop Estimates Committee

**MEETING: SECOND PRODUCTION FORECAST OF WINTER CROPS (2008)**

Attached please find the Agenda and Minutes for the Crop Estimates Committee (CEC) meeting to be held on Tuesday, 23 September 2008 at **11:00** in the Board Room, 7th Floor, Sefala Building, 503 Belvedere Street, Arcadia, Pretoria.

**Please remember to submit your inputs before 12:00 on Monday, 22 September 2008.**

Kind regards,

**Ollen Mathole**

**STATISTICIAN**

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|  | **CROP ESTIMATES COMMITTEE** |

**DATE**: 23 September 2008

**TIME**: 11:00

**VENUE**: Board Room, 7th Floor, Sefala Building, 503 Belvedere Street, Arcadia, Pretoria.

**AGENDA**

**SECOND PRODUCTION FORECAST OF WINTER CROPS (2008)**

1. OPENING AND WELCOME

2. ATTENDANCE

3. PERSONALIA

4. FINALISATION OF AGENDA

5. APPROVAL OF PREVIOUS MINUTES

5.1 Meeting held on 27 August 2008

6. MATTERS ARISING

6.1

6.2

7. ADDITIONAL ITEMS

7.1 Analysis of the summer crops R. Beukes / B. Netshifhefhe

7.2

8. WEATHER CONDITIONS: INFORMATION SESSION

1. INPUTS FROM OTHER DATA SUPPLIERS

9.1

10. WINTER CROPS (2008 SEASON)

10.1 Second production forecast

11. NEXT MEETING – 23 October 2008

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**MINUTES OF THE CROP ESTIMATES COMMITTEE MEETING HELD ON 27 AUGUST 2008 AT 10:00, BOARD ROOM, 7TH FLOOR, SEFALA BUILDING, ARCADIA, PRETORIA.**

**1.** **OPENING AND WELCOME**

The Chairperson, Mr R.D. Dredge, welcomed the attendees.

**2. ATTENDANCE**

**PRESENT:**

Mr R. Dredge Chief Director, Economic and Statistical Services, DoA

Mr B. Netshifhefhe Agricultural Statistics, DoA

MrsR. Beukes Agricultural Statistics, DoA

Ms M. Scheepers Agricultural Statistics, DoA

Ms O. Mathole Agricultural Statistics, DoA

Mrs W. Durand ARC-Grain Crops Institute

Ms C. Potgieter ARC-Institute for Soil, Climate and Water (partial attendance)

Mr W. Kilian ARC-Small Grains Institute

Mr H. Cerfonteyn PDA-Western Cape

Mr A. Fourie PDA-Free State

Mrs L. Kok PDA-Free State

Ms A. Swanepoel PDA-Northern Cape

Mr G. Müller PDA-KwaZulu-Natal

Mr J. Slabbert PDA-Limpopo

Mrs Z. Rakuambo PDA-Gauteng

Mrs E. Victor PDA-North West

Mr F. Aucamp PDA-North West

Mr E. Kibuuka Stats SA

Mr E. du Preez NCSC (partial attendance)

**ABSENT WITH APOLOGY:**

Ms E. Matsei Director, Agricultural Statistics, DoA

Mr M.L. Scheltens PDA-Mpumalanga

Mr S. Netshifhefhe PDA-Gauteng

Ms Z. Mkula PDA-Eastern Cape

Mr T. Newby ARC-Institute for Soil, Climate and Water

**3. PERSONALIA**

The following members were congratulated on their birthdays during August:

Marda Scheepers (12th),

Garrett Müller (23rd), and

Terry Newby (30th).

**4. APPROVAL OF PREVIOUS MINUTES**

The minutes of the meeting held on 24 July 2008 were accepted, with the following amendment:

The name of “*Mr S. Netshifhefhe*” to be added to the attendance register under the heading “*Absent with apology*”.

**5. MATTERS ARISING**

None

**6. ADDITIONAL ITEMS**

6.1 Objective yield determination for winter crops: 2008 production season

A proposal with regard to the future planning for objective yield (OY) determination was sent to the Secretariat of the CEC by Mr Kilian. He explained that the current OY figures provided by the NCSC, through the ARC-SCI, are based on counts in the field that are interpreted with some **assumptions** to get to an average yield for the different provinces. Against this background, it was proposed that the OY determination be done once annually (instead of the current three or four times) at a growing stage where the kernels per ear can be counted, thus giving a more accurate figure. Another important improvement will be that due to the down-scaling of the number of field visits, the amount of points to be sampled will increase by approximately three times. The proposal is attached as Annexure A.

Mrs Durand also supported the proposal and added that NASS-USDA has applied this specific method for almost 45 years. She stated that in their system, besides applying models based on a 15 year data set, the trend over time is also considered. In South Africa, each estimate is perceived to be independent from the previous, and a convergence of evidence methodology is followed. As many unknown variables are used to calculate yield early in the season, these yields vary from survey to survey. These large variations from survey to survey had led to confusion in the case of maize, as these figures, in South Africa, are not evaluated in context with each other (trend) or in relation to the growth stage of the crop. She thus suggested that for wheat in South Africa, as for maize, only one OY survey should be undertaken at a time when the crop is mature enough to allow actual kernel measurements to be made.

Mr Kilian also indicated that the NCSC will be able to supply trustworthy figures on the split between dry land and irrigation for wheat, due to the higher number of points that will be sampled.

The meeting supported the proposal that the OY be done once annually. Furthermore, the Chairperson requested the Secretariat to amend the relevant documentation in this regard.

**7. WEATHER CONDITIONS: INFORMATION SESSION**

Ms C. Potgieter of the ARC: ISCW presented an overview of the weather conditions.

**Total rainfall for July 2008 compared to the long term mean:**

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| The most important aspect of the rainfall distribution during July 2008 was the above-average rainfall over the winter rainfall regions. Only the eastern parts of the winter rainfall region received below average rainfall. Rainfall totals exceeded 150 mm over most of the Swartland and 300 mm over certain areas of the Boland. The Overberg-area - southern part of the winter rainfall area - was mostly drier than average.  Some areas over the Limpopo, North West and Gauteng Provinces also received above-average rainfall. Totals were mostly below 5 mm over these regions, except for the north-eastern parts of Limpopo. The rest of the country was dry, which is normal for this time of the year. |

**NDVI difference map for May 2008 to July 2008 compared to May 2007 to July 2007:**

Considering the NDVI difference map for May 2008 to July 2008 compared to the same period the previous year, higher vegetation activity can be seen over the summer rainfall areas for May to July 2008, than for the same period in 2007. Lower vegetation activity can be seen in the Limpopo and Eastern Cape Provinces, as well as the Kruger National Park.

**FOLLOW-UP ACTION:**

* Mrs Beukes suggested that the ARC:ISCW create another layer on their presentations, indicating the summer and winter producing areas.

**8. INPUTS FROM OTHER DATA SUPPLIERS**

8.1 National Crop Statistics Consortium

On request of the Chairperson, Mr Du Preez explained the methodology used by the Consortium to the new members of the CEC. A detailed report on the methodologies used by the input suppliers to the CEC can be downloaded from the following website: http://[www.nda.agric.za](http://www.nda.agric.za), click on “Food Security Statistics”, go to "Methodologies used by the CEC” and download the relevant file.

Mr Du Preez also reported on the results obtained from the PICES survey for winter crops for the Western and Northern Cape Provinces, as well as on the results obtained from the telephonic survey for the Free State (presentation attached as Annexure B). Due to the crops being planted later in the season in the Free State, the PICES survey will be done in September 2008, whereafter the results will be made available to the CEC.

**FOLLOW-UP ACTION**:

* The Chairperson requested the Secretariat to, in future, make copies of the NCSC presentation(s) available at the time of the meeting.

**9. WINTER CROPS (2008 PRODUCTION SEASON)**

9.1 Revised area estimate and first production forecast

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| --- | --- | --- | --- | --- | --- |
| CROP | **AREA PLANTED**  **2008**  **HA** **A** | **1st Forecast**  **2008**  **TONS** **B** | AREA PLANTED  2007  HA C | FINAL CROP  2007  TONS D | CHANGE  2008 vs 2007 % B/D |
| **Commercial:** | | | | | |
| Wheat | **748 000** | **2 185 350** | 632 000 | 1 905 000 | +14,72 |
| Malting barley | **65 045** | **170 924** | 73 360 | 222 500 | -23,18 |
| Canola | **35 000** | **35 000** | 33 200 | 38 150 | -8,26 |
| TOTAL | **848 045** | **2 391 274** | 738 560 | 2 165 650 | +10,42 |

9.2 Discussion

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| WHEAT: | Based on the information at its disposal, the CEC revised the area estimate for wheat to 748  000 ha, which is 0,6% less than the 752  500 ha of the previous forecast. An estimated 350  000 ha or 47% is planted in the Western Cape, 280  000 ha or 37% in the Free State and 50  000 ha or 7% in the Northern Cape. |
| OTHER CROPS: | The production forecast for malting barley is 170  924 tons. The area planted is estimated at 65  045 ha, while the expected yield is 2,63t/ha. The expected canola crop is 35 000 tons. The area estimate for canola is also 35 000 ha, with an expected yield of 1,0 t/ha. |

**10. SUMMER CROPS (2007/08 PRODUCTION SEASON)**

10.1 Area and final production estimate

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| --- | --- | --- | --- | --- | --- | --- |
| Crop | **Area Planted**  **2007/08**  **Ha** | **Final Estimate**  **2007/08**  **Tons** | 6th Forecast  2007/08  Tons | Area Planted  2006/07  Ha | Final Crop  2006/07  Tons | Change  2007/08 vs 2006/07  % |
|  | **(A)** | **(B)** | (C) | (D) | (E) | (B) ÷ (C) |
| **Commercial:** | | | | | | |
| White Maize | **1  737  000** | **7 098 250** | 6 861 400 | 1 624 800 | 4 315 000 | +3,45 |
| Yellow Maize | **1  062  000** | **4 922 900** | 4 736 200 | 927 000 | 2 810 000 | +3,94 |
| Total maize | **2  799  000** | **12 021 150** | 11 597 600 | 2 551 800 | 7 125 000 | +3,65 |
| Sunflower seed | **564  300** | **885 560** | 885 560 | 316 350 | 300 000 | - |
| Soya-beans | **165  400** | **308 295** | 322 995 | 183 000 | 205 000 | -4,55 |
| Groundnuts | **54  200** | **85 360** | 85 360 | 40 770 | 58 000 | - |
| Sorghum | **86  800** | **260 425** | 269 425 | 69 000 | 176 000 | -3,34 |
| Dry beans | **43  800** | **58 975** | 58 975 | 50 725 | 39 545 | - |
| TOTAL | **3 713 500** | **13 619 765** | 13 219 915 | 3 211 645 | 7 903 545 | +3,02 |

10.2 Discussion

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| COMMERCIAL MAIZE: | The final production estimate of the commercial maize crop was set at 12,021 mill. tons, which is 3,65% more than the previous forecast of 11,598 mill. tons. The final estimate was marginally increased due to higher yields this season. The area planted remained unchanged at 2,799 mill. ha with an expected yield of 4,29 t/ha. The area for white maize is 1,737 mill. ha, and for yellow maize it is 1,062 mill. ha. The ratio of white to yellow maize plantings is 62:38 as against the previous seasons’ 64:36.  The final production of white maize is 7,098 mill. tons, which is 3,45% more than the 6,861 mill. tons of the previous forecast, while the yield for white maize is 4,09 t/ha. In the case of yellow maize the final production estimate is 4,923 mill. tons, which is 3,94% more than the 4,736 mill. tons of the previous forecast, while the yield for the yellow maize is 4,64 t/ha. |
| SUNFLOWER SEED: | The production estimate for sunflower seed remained unchanged at 885  560 tons. The estimated area planted to sunflower seed also remained unchanged at 564 300 ha. The expected yield is 1,57 t/ha. |
| OTHER CROPS: | Taking the SAGIS producer deliveries into consideration, the final **soya-beans** estimate was decreased by 4,55% to 308  295 tons. The area planted to soya-beans was also adjusted downward by 5,16% to 165  400 ha, while the expected yield is 1,86 t/ha.  The expected **groundnut** crop remained unchanged at 85  360 tons. The area estimate also remained unchanged at 54  200 ha, while the expected yield is 1,57 t/ha.  Based on the actual SAGIS producer deliveries, the final **sorghum** estimate was adjusted downward by 3,34% to 260  425 tons. The area estimate for sorghum was also decreased to 86  800 ha ─ a decline of 3,34%. The expected yield is 3,0 t/ha.  In the case of **dry beans,** the production estimate as well as the area planted remained unchanged at 58  975 tons and 43  800 ha, respectively. The expected yield is 1,35 t/ha. |
| SUBSISTENCE AGRICULTURE: | The production forecast as well as the area planted to maize in the subsistence agricultural sector was left unchanged at 497  980 ha and 464  069 tons, respectively. |

**FOLLOW-UP ACTION:**

* Due to the fact that it was the final estimate for summer crops for the 2007/08 season, it was proposed that the Secretariat do an analysis/compare the data on area planted that was supplied by the DoA and the NCSC to the CEC during the past season.

**11.** The meeting adjourned at 12:20.

**12. NEXT MEETING**

The next meeting of the Crop Estimates Committee will be held DV on **Tuesday, 23 September  2008 at *11:00***. The meeting will be held in the **Board Room**, 7th Floor, Sefala Building, 503 Belvedere Street, Arcadia, Pretoria.