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

**From:** Marda Scheepers

**Tel:** 012  319 8033 **Fax:** 012  319 8031/5 **E-mail:** MardaS@nda.agric.za

Ref: 26.4.5

13 October 2008

## To all the members of the Crop Estimates Committee

**MEETING: THIRD PRODUCTION FORECAST OF WINTER CEREAL CROPS (2008) AND INTENTIONS TO PLANT SUMMER GRAIN CROPS (2008/09 PRODUCTION SEASON)**

Attached please find the Agenda and Minutes for the Crop Estimates Committee (CEC) meeting to be held on Thursday, 23 October 2008 at **10:00** in the Board Room, 7th Floor, Sefala Building, 503 Belvedere Street, Arcadia, Pretoria.

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

Kind regards,

**Marda Scheepers**

**STATISTICIAN**

|  |  |
| --- | --- |
|  | **CROP ESTIMATES COMMITTEE** |

**DATE**: 23 October 2008

**TIME**: 10:00

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

**AGENDA**

**THIRD PRODUCTION FORECAST OF WINTER CROPS (2008) AND**   
**INTENTIONS TO PLANT SUMMER CROPS (2008/09 PRODUCTION SEASON)**

1. OPENING AND WELCOME

2. ATTENDANCE

3. PERSONALIA

4. FINALISATION OF AGENDA

5. APPROVAL OF PREVIOUS MINUTES

5.1 Meeting held on 23 September 2008

6. MATTERS ARISING

6.1

6.2

7. ADDITIONAL ITEMS

7.1

7.2

8. WEATHER CONDITIONS: INFORMATION SESSION

1. INPUTS FROM OTHER DATA SUPPLIERS

9.1

10. WINTER CROPS (2008 SEASON)

10.1 Third production forecast

11. SUMMER CROPS (2008/09 PRODUCTION SEASON)

11.1 Intentions to plant summer crops

12. NEXT MEETING – 25 November 2008

-------------000-------------

**MINUTES OF THE CROP ESTIMATES COMMITTEE MEETING HELD ON 23 SEPTEMBER 2008 AT 11:00, 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

Ms E. Matsei Director, Agricultural Statistics, DoA

Mr B. Netshifhefhe Agricultural Statistics, DoA

MrsR. Beukes Agricultural Statistics, DoA

Ms M. Scheepers Agricultural Statistics, DoA

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

Mr J. Malherbe ARC-Institute for Soil, Climate and Water (partial attendance)

Mrs W. Durand ARC-Grain Crops Institute

Mr W. Kilian ARC-Small Grains Institute

Mr H. Cerfonteyn PDA-Western Cape

Mr A. Fourie PDA-Free State

Mr G. Müller PDA-KwaZulu-Natal

Mrs E. Victor PDA-North West

Mr F. Aucamp PDA-North West

Mr M.L. Scheltens PDA-Mpumalanga

Ms Z. Mkula PDA-Eastern Cape

Mrs L. Mellet NAMC

Mr F. Ferreira NCSC (partial attendance)

**ABSENT WITH APOLOGY:**

Ms A. Swanepoel PDA-Northern Cape

Dr. T Silwana PDA-Eastern Cape

Mr J. Slabbert PDA-Limpopo

Mrs Z. Rakuambo PDA-Gauteng

Mr E. du Preez NCSC

Ms O. Mathole Agricultural Statistics, DoA

**3. PERSONALIA**

The following members were congratulated on their birthdays during September:

Elna Victor (7th),

Deon du Toit (9th),

Marco Scheltens (17th), and

Zanele Mkula (21st).

Mr F. Ferreira and his company GeoterraImage was congratulated in coming third in the small business division of the AHI Entrepreneur of the Year awards.

**4. APPROVAL OF PREVIOUS MINUTES**

The minutes of the meeting held on 27 August 2008, were accepted without any amendments.

**5. MATTERS ARISING**

None.

**6. ADDITIONAL ITEMS**

**6.1 Analysis of the summer crops for the 2007/08 production season**

At the previous meeting it was requested that an analysis be carried out to identify the points of concern in the setting of the estimates.

Mrs R. Beukes carried out the analysis on the area planted to summer crops in the Free State, Mpumalanga, Gauteng and North West Provinces. She presented graphs of all the input providers of each crop in the mentioned Provinces. She mentioned that it is very important to note that at the Crop Estimates Liaison Committee (CELC) meeting held on 29 November 2008, it was agreed that the Producer Independent Crop Estimates System (PICES) should be used in future as the benchmark of the area planted figures. Considering white maize, Mrs Beukes mentioned that in 75% of the cases the inputs of the PDAs were the closest to the area planted figure of the Crop Estimates Committee (CEC). For yellow maize the inputs of the National Crop Statistics Consortium (NCSC) were in 50% of the cases the closest to the area planted figure of the CEC. Mrs W. Durand stated that the inputs of the PDAs are biased as it is based on ‘gut feel’ and the figures of the other input providers. Mrs Beukes responded by stating that considering the graphs it is a fact that the PDAs play an important role in the setting of the area estimates. She further elaborated and said that the CEC is not consistent in setting the area estimate for every province (presentation attached as Annexure A).

**FOLLOW-UP ACTION:**

* Mrs Durand proposed that a workshop be held to discuss the different means by which every input provider can present their estimates to make it more understandable for all the CEC members.
* Mrs Beukes also suggested that a meeting be scheduled with Mrs Durand to improve the CEC meeting document.
* It was suggested that this analysis be redone for the area, yield and production after the finalisation of the summer crops during the November 2008 CELC Meeting. The analysis should include the last two seasons’ data and the NCSC will assist the secretariat with this exercise.

**6.2 An additional summer crop estimate in September 2008**

The chairperson informed the meeting that CELC, through the South African Cereal and Oilseeds Trade Association (SACOTA), requested that an additional summer crop estimate be released in September 2008. As no new information was available to revise the previous estimate, the CEC chairperson had decided against another estimate.

**7. WEATHER CONDITIONS: INFORMATION SESSION**

Mr J. Malherbe of the ARC: ISCW presented an overview of the weather conditions.

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

|  |  |
| --- | --- |
|  |  |
| According to the South African Weather Service for the period 1 to 20 September 2008, rainfall occurrences were again restricted to the coastal areas, especially in the Western Cape. The central and eastern parts of the country remained dry for the mentioned period, but some good rainfall amounts are needed to boost the soil moisture levels as the planting season approaches. September usually signals the start of the summer rainfall season.  Comparing the rainfall of September with the long-term mean, it is evident that it was below average for the eastern parts of the country, but above average in the western parts especially the winter rainfall areas of the Swartland. | |

**NDVI difference map for September compared to the long-term mean:**

|  |
| --- |
|  |
| Vegetation conditions for September compared to the long-term mean were normal to below-normal throughout the country. Lower vegetation activity than the long-term mean, is evident in the southern parts of the Western and Eastern Cape as well as the northern parts of KwaZulu-Natal. |

**8. INPUTS FROM OTHER DATA SUPPLIERS**

8.1 National Crop Statistics Consortium

Mr Fanie Ferreira reported on the results obtained from the PICES survey of the winter crops for the Free State Province. He mentioned that the coefficient of variance (cv) of PICES for wheat has improved by 1% from the previous season. The improvement can be attributed to the creation of an extra stratum called a “very high winter stratum” by using the February and March 2007 Landsat satellite imagery. He also mentioned that it is important to note that there has been a shift in the wheat plantings of the Free State from the western to the eastern areas. The reason for this can be debated, but the price of wheat could definitely be a contributing factor (presentation attached as Annexure B).

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

9.1 Revised area estimate and second production forecast

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| CROP | **AREA PLANTED**  **2008**  **HA** **A** | **2nd Forecast**  **2008**  **TONS** **B** | 1st Forecast  2008  TONS C | AREA PLANTED  2007  HA D | FINAL CROP  2007  TONS E | CHANGE  2008 vs 2007 % B/C |
| **Commercial:** | | | | | | |
| Wheat | **748 000** | **2 186 500** | 2 185 350 | 632 000 | 1 905 000 | +0,05 |
| Malting barley | **65 045** | **170 924** | 170 924 | 73 360 | 222 500 | - |
| Canola | **34 000** | **34 000** | 35 000 | 33 200 | 38 150 | -2,86 |
| TOTAL | **847 045** | **2 391 474** | 2 391 274 | 738 560 | 2 165 650 | +0,01 |

9.2 Discussion

|  |  |
| --- | --- |
| WHEAT: | The production forecast for wheat is 2,187 million tons, which is 0,05% or 1  150 tons higher than the previous forecast of 2,185 million tons. The yield is 2,92 t/ha. The expected production remained unchanged at 805  000 tons in the Western Cape, 714  000 tons in the Free State and315  000 tons in the Northern Cape.  The area planted to wheat remained unchanged at 748  000 ha. 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.  It can be pointed out that following above-normal rainfall, the production conditions in the major wheat producing areas of the Western Cape remain favourable. However, the difficult production conditions in the southern Cape and the lack of rainfall for the inland wheat producing areas have limited the increase in the potential wheat crop for this season. |
| OTHER CROPS: | The production forecast for malting barley remained unchanged at 170  924 ton. The area planted also remained unchanged at 65  045 ha, while the expected yield is 2,63 t/ha.  The expected canola crop is 34  000 tons, which is 2,86% less than the 35  000 tons of the previous forecast. The area estimate for canola was adjusted downward to 34  000 ha. The expected yield is 1,0 t/ha. |

**10.** The meeting adjourned at 12:40.

**11. NEXT MEETING**

The next meeting of the Crop Estimates Committee will be held DV on **Thursday, 23 October  2008 at *10:00***. The meeting will be held in the **Board Room**, 7th Floor, Sefala Building, 503 Belvedere Street, Arcadia, Pretoria.