

MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA: DECEMBER 2009

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Directorate: Agricultural Statistics



**agriculture,
forestry & fisheries**

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1. Highlights

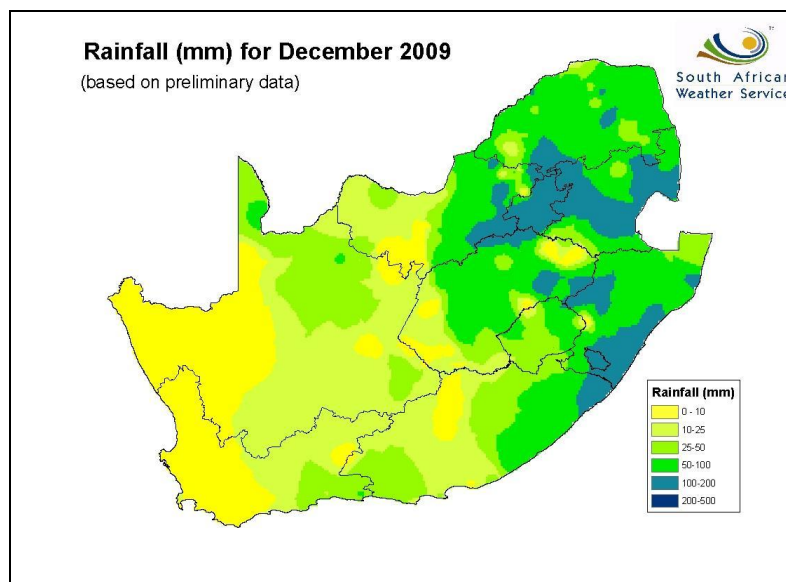
- The rainfall map indicates that the central and eastern regions received good rainfall totals during the month of December.
- Comparing the numbers set by the CEC during September 2009, with the final calculated crop figures, the size of the commercial maize crop was estimated 309 200 tons or 2,6% lower than the final crop production figure of 12,05 million tons for the 2008/09 production season.
- Projections for the current 2009/10 maize marketing season indicate that South Africa will have a surplus of 1,701 million tons of maize at the end of April 2010.
- Projections for the coming 2010/11 maize marketing season indicate that South Africa will have a surplus of 1,417 million tons of maize at the end of April 2011.
- The expected commercial wheat crop for the 2009 production season is 1,979 million tons, which is 7,08% less than the 2,130 million tons of last season.
- Projections for the current 2009/10 wheat marketing season indicate that South Africa will have a surplus of 627 000 tons of wheat at the end of September 2010.
- The headline CPI (for all urban areas) annual inflation rate in November 2009 was lower at 5,8% (i.e. the CPI in November 2009 compared with that in November 2008).
- The annual percentage change in the PPI was higher at -1,2% in November 2009 (i.e. the PPI in November 2009 compared with that in November 2008).
- December 2009 tractor sales of 221 units were almost 50% less than the 440 units sold in December 2008.

2. Weather conditions

2.1 Rainfall for December 2009

The rainfall map indicates that the central and eastern regions received good rainfall totals during the month of December, while limited rainfall was received in the Northern Cape as well as large areas of the Western and Eastern Cape provinces (Figure 1).

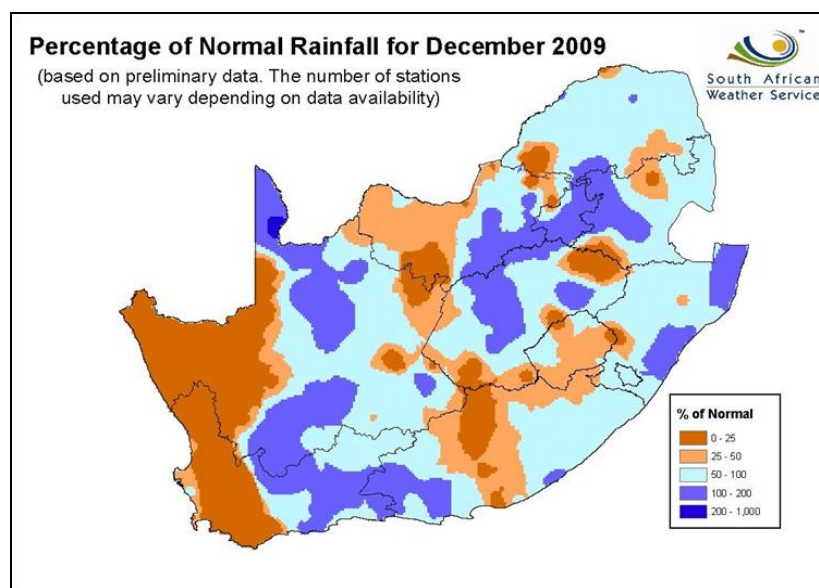
Figure 1: Total rainfall for December 2009



Source: SA Weather Service

The map for the percentage of normal rainfall for the month of December 2009 (Figure 2) illustrates a significant percentage of normal to above-normal rainfall for most parts of country except for the far-western regions, as well as isolated areas of the North West, Free State and Eastern Cape provinces, which were characterised by below-normal rainfall occurrences as compared to the long term mean.

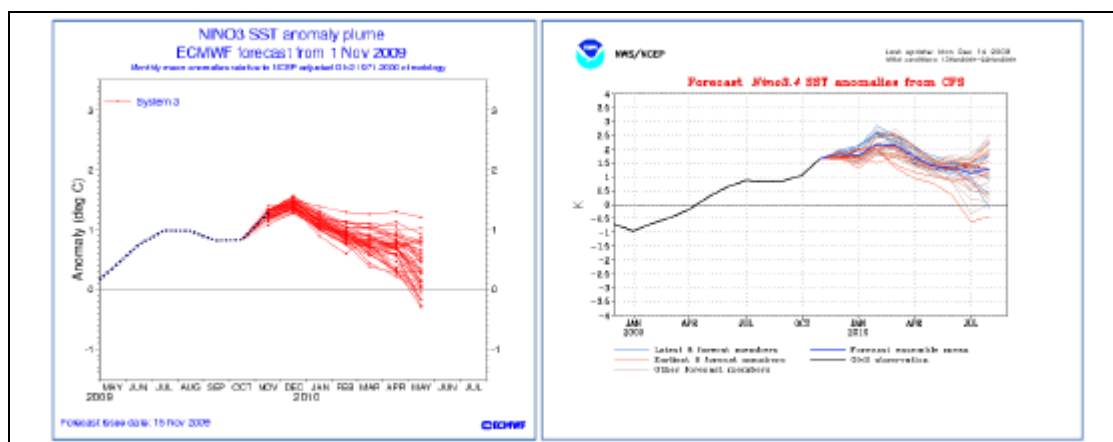
Figure 2: Percentage of normal rainfall for December 2009



Source: SA Weather Service

2.2 ENSO forecast (November 2009 to July 2010)

Figure 3: ENSO forecast for the period November 2009 to July 2010



Source: SA Weather Service

ENSO forecasts (above) continue to show enhanced probabilities of El Niño conditions to occur during the 2009/10 summer rainfall season and that the anticipated El Niño event may be moderately strong since the forecast of the Sea Surface Temperature (SST) anomalies over the NINO 3.4 region is above 1°C, starting a decreasing trend around February/March 2010. However, the intensity of an El Niño event does NOT indicate how much the event may affect southern African rainfall totals during the summer months – the relatively weak El Niño events at the beginning of the 1990s were associated with intense drought over the region, while rainfall totals during the very strong 1997/98 event were close to the average over the larger part of South Africa. Notwithstanding, El Niño events are much more often associated with summer drought conditions over the region, than not.

2.3 Level of dams

Available information on the level of South Africa's dams on 4 January 2010 indicates that the country has approximately 85% of its full supply capacity (FSC) available, which is 7% more than last year. The provincial distribution of South Africa's water supply (including Lesotho) is contained in Table 1 below.

Table 1: Level of dams, 4 January 2009

Province	Total FSC in million cubic metres	4/01/2010 (%)	Last Year (%)
Eastern Cape	1 796	57	65
Free State	16 090	88	78
Gauteng	115	101	100
KwaZulu-Natal	4 529	84	77
Lesotho	2 376	81	84
Limpopo	1 159	78	70
Mpumalanga	2 527	98	80
North West	808	77	67
Northern Cape	143	94	86
Western Cape	1 843	79	83
Total	31 386	85	78

Source: Department of Water Affairs



3. Grain production

3.1 Summer grain crops

3.1.1 Final production estimate of summer grain crops for the 2008/09 production season

The revised final area planted and crop production figures for the commercial summer grain crops for the 2008/09 production season were released on 26 November 2009.

Table 2: Commercial summer crops: Final production figures - 2008/09 production season

CROP	Final Area planted 2008/09 Ha A	Final Crop 2008/09 Tons B	Final Area planted 2007/08 Ha C	Final Crop 2007/08 Tons D	2008/09 vs 2007/08 % B ÷ D
Commercial:					
White Maize	1 489 000	6 775 000	1 737 000	7 480 000	-9,43
Yellow Maize	938 500	5 275 000	1 062 000	5 220 000	+1,05
Total maize	2 427 500	12 050 000	2 799 000	12 700 000	-5,12
Sunflower seed	635 800	801 000	564 300	872 000	-8,14
Soya-beans	237 750	516 000	165 400	282 000	+82,98
Groundnuts	54 550	99 500	54 200	88 800	+12,05
Sorghum	85 500	276 000	86 800	255 000	+8,24
Total	3 441 100	13 742 500	3 669 700	14 197 800	-3,21

The CEC estimated total production figures were revised, using the published figures of the South Africa Grain Information Service (SAGIS) of actual deliveries as the basis for the calculation. The figures from the maize utilisation survey to determine on-farm usage and retentions that was conducted by the Department of Agriculture, Forestry and Fisheries (DAFF) and National Crop Statistics Consortium (NCSC), were added to the SAGIS figures to calculate total figures.

Comparing the final crop figures of 2008/09 with the final figures of the 2007/08 production season, the size of the commercial maize crop was 5,12% lower than the final crop production figure of 12,7 million tons of the previous season. In the case of commercial soya-beans, groundnuts and sorghum, the final crops figures were higher by 82,98%, 12,05% and 8,24%, respectively, compared to the previous season. With regard to commercial sunflower seed, the final crop figure was lower by 8,14% compared to the 2007/08 production season.

The preliminary area planted forecast for summer grain crops for the 2009/10 production season will be released on 21 January 2010.

3.2 Winter cereal crops

3.2.1 Fifth production forecast of winter cereal crops for 2009 production season.

The CEC released the fifth production forecast of winter cereal crops for the 2009 production season on 17 December 2009.

Table 3: Winter cereals – Fifth production forecast – 2009 production season

CROP	Area planted 2009 Ha (A)	5th forecast 2009 Tons (B)	Area planted 2008 Ha (C)	Final crop 2008 Tons (D)	Change % (B) ÷ (D)
Wheat	657 500	1 979 250	748 000	2 130 000	-7,08
Malting barley	74 760	223 870	68 245	192 000	+16,60
Canola	38 060	45 660	34 000	30 800	+48,25
Total	770 320	2 248 780	850 245	2 352 800	-4,42

The area estimate for **wheat** is 657 500 ha, which is 12,1% less than the 748 000 ha planted for the previous season. An estimated 315 000 ha or 48% is planted in the Western Cape, 235 000 ha or 36% in the Free State and 44 000 ha or 7% in the Northern Cape.

The production forecast of wheat is 1,979 million tons, which is 7,08% less than the 2,130 million tons of last season. The yield for wheat is 3,01 t/ha as against 2,85 t/ha the previous season. The expected production in the Western Cape is 724 500 tons, 622 750 tons in the Free State and 281 600 tons in the Northern Cape.

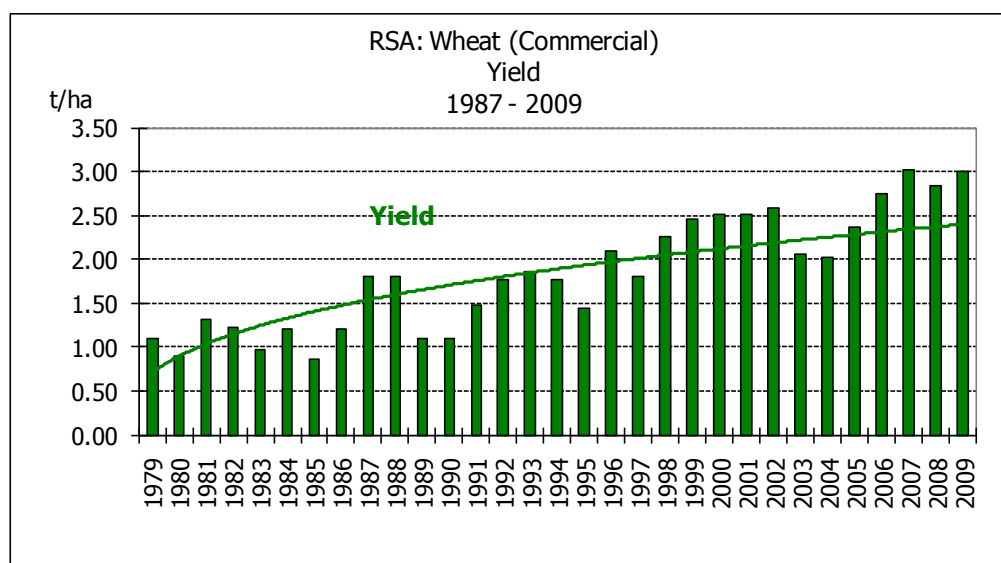
3.2.2 Other commercial winter crops

The production forecast for **malting barley** is 223 870 tons, which is 16,60% more than the previous seasons' crop of 192 000 tons. The area planted is estimated at 74 760 ha, an increase of 9,55% compared to the previous seasons' plantings of 68 245 ha. The yield is 2,99 t/ha as against 2,81 t/ha of the previous season.

The production forecast for **canola** is 45 660 tons, which is 48,25% more than the 30 800 tons of last season. The area estimate for canola is 38 060 ha, which is 11,94% more than last seasons' plantings of 34 000 ha. The yield is 1,2 t/ha as against 0,91 t/ha of the previous season.

The Graph below provides a historic overview of the realised yield of commercial wheat. It is evident that yield realised over time shows an increasing trend. This increasing trend can mainly be attributed to improved cultivation practises and higher yielding cultivars.

Graph 1: Yield of commercial wheat



The sixth production forecast for winter cereals for the 2009 production season will be released on 21 January 2010.



4. Cereal balance sheets

Supply and demand data for November 2009 was released by SAGIS on 23 December 2009. Table 4 contains the Wheat Balance Sheet for the 2009/10 marketing season. Tables 5 and 6 contain the Maize and Sorghum Balance Sheets for 2009/10 and projections for the 2010/11 marketing season. **(Preliminary information is subject to change on a monthly basis.)**

4.1 Winter cereals

Table 4: Projected Balance Sheet for Wheat for the current 2009/10 marketing season

2009/10 Projected wheat Balance Sheet as at 31 December 2009	Wheat (1 000 tons)
Supply	
Opening stocks (October 2009)	686
SAGIS Opening Stocks	686
Gross production (2009 season)	1 988
Commercial production	1 979
Subsistence agriculture	9
Total domestic supply	2 674
Plus: Imports	1 140
Total supply	3 814
Demand	
Consumption	2 947
Commercial: Human	2 850
Animal (feed)	9
Retentions by producers	42
Seed for planting purposes	26
Other*	20
Subsistence agriculture	9
Total domestic consumption	2 956
Plus: Exports	231
Total demand	3 187
Closing stocks (September 2010)	627
Pipeline requirements	625
Domestic shortfall	-907
Import gap	907
Surplus above pipeline	2
SAGIS closing stocks as at end of November 2009	1 279

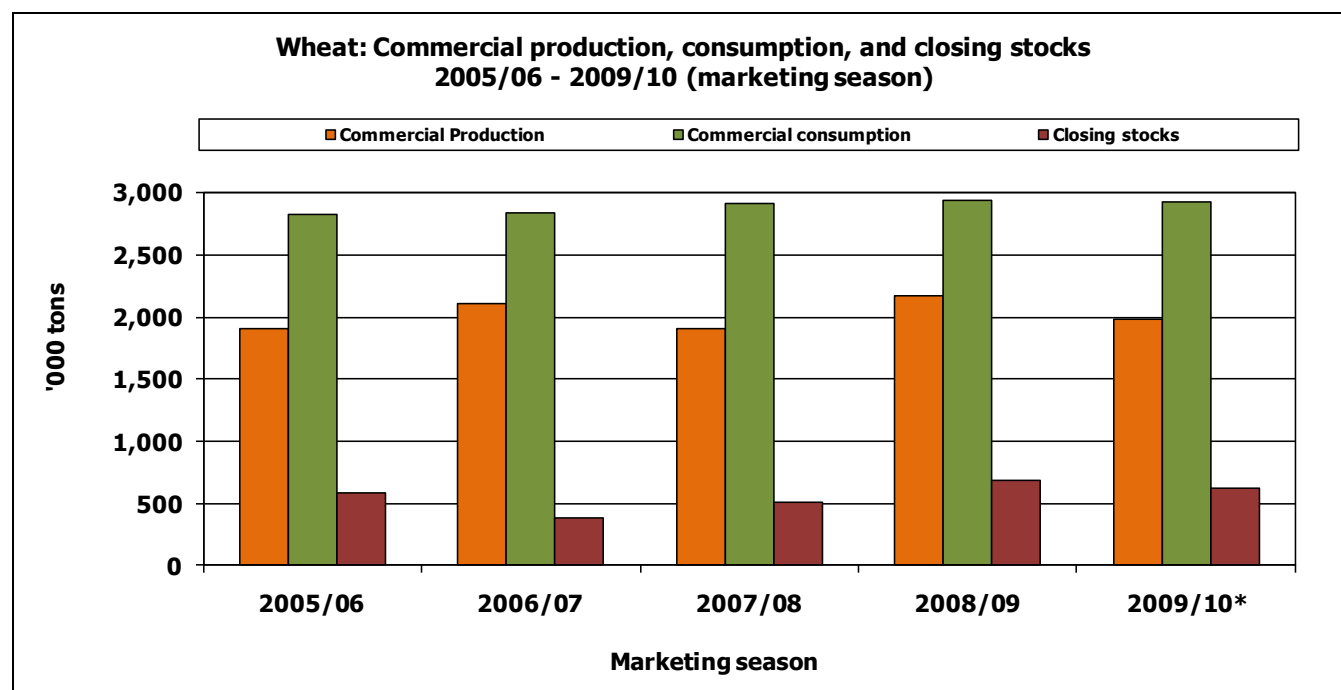
Notes:

- Source: SAGIS, Directorate: Agricultural Statistics.
- *Other refers to wheat released to end-consumers, withdrawn by producers and/or retentions by producers.
- Figures might not add up correctly due to rounding.
- Marketing season for wheat is October to September.
- Pipeline requirements are 80 days of food consumption.

4.1.2 Discussion of the current 2009/10 wheat situation

The expected total supply of wheat is 3,814 million tons, including projected imports of 1,1 million tons during the 2009/10 marketing season. South Africa will require 625 000 tons for pipeline requirements at the end of September 2010. Total demand, including exports of 231 000 tons is seen at 3,187 million tons during the 2009/10 marketing season. Thus, closing stocks at the end of September 2010 is expected to be 627 000 tons.

Graph 2: Commercial production, consumption and closing stocks of wheat



**2009/10 – projection*

From the graph it is evident that although the consumption of wheat is consistent at around 2,8 million tons, commercial production and closing stocks vary from one season to another, depending on the price and profitability of wheat production. The closing stocks for the current season is estimated at 627 000 tons and is 8,60% less than the previous season (686 000 tons). This decrease can mainly be attributed to the lower expected gross production of wheat for the 2009/10 marketing season.

4.2 Summer grains

Table 5: Projected Balance Sheet for Maize and Sorghum for the current 2009/10 marketing season

2009/10 Projected Annual Cereal Balance Sheet as at 31 December 2009 (1 000 tons)	Maize			Sorghum
	White	Yellow	Total	
Supply				
Opening stocks	766	819	1 585	62,5
SAGIS Opening Stocks	766	819	1 585	62,5
Gross production	7 154	5 413	12 567	316,3
Commercial production	6 775	5 275	12 050	276,5
Subsistence agriculture	379	138	517	39,8
Total domestic supply	7 920	6 232	14 152	378,8
Plus: Imports	-	-	-	5,0
Total supply	7 920	6 232	14 152	383,8
Demand				
Consumption	4 835	5 089	9 924	218,8
Commercial: Human	4 300	360	4 660	185,3
Animal (feed)	230	4 000	4 230	8,5
Gristing	70	19	89	-
Seed for planting purposes	19	15	34	-
Other*	216	695	911	25,0
Subsistence agriculture	379	138	517	39,8
Total domestic consumption	5 214	5 227	10 441	258,6
Plus: Exports	1 700	310	2 010	46,9
Products	50	50	100	-
Whole maize	1 650	260	1 910	-
Total demand	6 914	5 537	12 451	305,5
Closing stocks (2010)	1 006	695	1 701	78,3
Pipeline requirements	567	540	1 107	23,9
Domestic surplus	2 139	465	2 604	96,3
Surplus above pipeline	439	155	594	54,4
SAGIS closing stocks as at end of November 2009	3 619	2 483	6 102	163,2

Notes:

- Source: SAGIS, Directorate: Agricultural Statistics.
- *Other refers to grains released to end-consumers and/or withdrawn by producers, and retentions on farms.
- Figures might not add up correctly due to rounding.
- Marketing season for maize: May to April.
- Marketing season for sorghum: April to March.
- Early deliveries refer to the deliveries in March and April for maize and March for sorghum.
- Pipeline requirements are 45 days of commercial consumption.

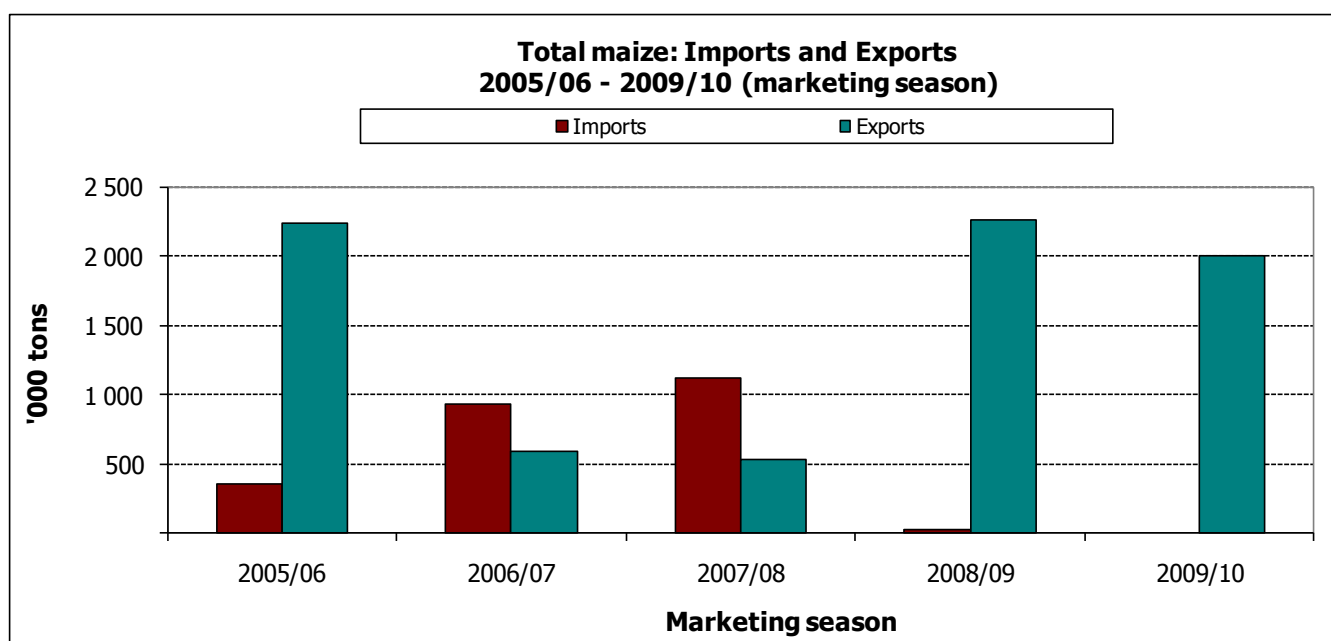
4.2.1 Discussion of the current 2009/10 maize and sorghum situation

Considering the 2009/10 marketing season, the projected total supply of white maize is 7,920 million tons, including opening stocks of 766 000 tons. Total demand (exports included) is expected to reach 6,914 million tons and the closing stocks are expected to be 1,006 million tons as at 30 April 2010.

For yellow maize, the projected total supply is 6,232 million tons, which includes the opening stocks of 819 000 tons. Total demand, including exports, is projected at 5,537 million tons. Projections for the 2009/10 marketing season indicate closing stocks of 695 000 tons at the end of April 2010.

Actual maize exports for the current season until 1 January 2010, comes to 1,168 million tons, including 1,008 million tons of white maize and 160 592 tons of yellow maize. Based on the exports seen to date, a total export figure of approximately 2,010 million tons is possible for the 2009/10 marketing season.

Graph 3: Total maize imports and exports: 2005/06 - 2009/10 marketing season



Sorghum: The expected total supply, including 5 000 tons of imports, is seen at 383 800 tons. Consumption is estimated at 218 800 tons and consists of food consumption at 185 300 tons, feed consumption at 8 500 tons and other consumption at 25 000 tons. The total demand of sorghum is seen at 305 500 tons, including exports of 46 900 tons. Closing stocks at the end of March 2010 is estimated at 78 300 tons.

Table 6: Projected Balance Sheet for Maize and Sorghum for the 2010/11 marketing season

2010/11 Projected Annual Cereal Balance Sheet as at 31 December 2009 (1 000 tons)	Maize			Sorghum
	White	Yellow	Total	
Supply				
Opening stocks	1 006	695	1 701	78,3
SAGIS Opening Stocks	1 006	695	1 701	78,3
Gross production	6 957	4 232	11 189	240,0
Commercial production	6 578	4 094	10 672	200,2
Subsistence agriculture	379	138	517	39,8
Total domestic supply	7 963	4 927	12 890	318,3
Plus: Imports	-	400	400	10,0
Total supply	7 963	5 327	13 290	328,3
Demand				
Consumption	5 313	4 413	9 726	218,8
Commercial: Human	4 300	263	4 563	185,3
Animal (feed)	678	3 555	4 233	8,5
Gristing	70	15	85	-
Seed for planting purposes	19	15	34	-
Other*	246	565	811	25,0
Subsistence agriculture	379	138	517	39,8
Total domestic consumption	5 692	4 551	10 243	258,6
Plus: Exports	1 518	112	1 630	44,1
Products	50	39	89	-
Whole maize	1 468	73	1 541	-
Total demand	7 210	4 663	11 873	302,7
Closing stocks (2011)	753	664	1 417	25,6
Pipeline requirements	622	473	1 095	23,9
Domestic surplus	1 649	-97	1 552	35,8
Import gap	-	97	97	-
Surplus/ shortage above pipeline	131	191	322	1,7

Notes:

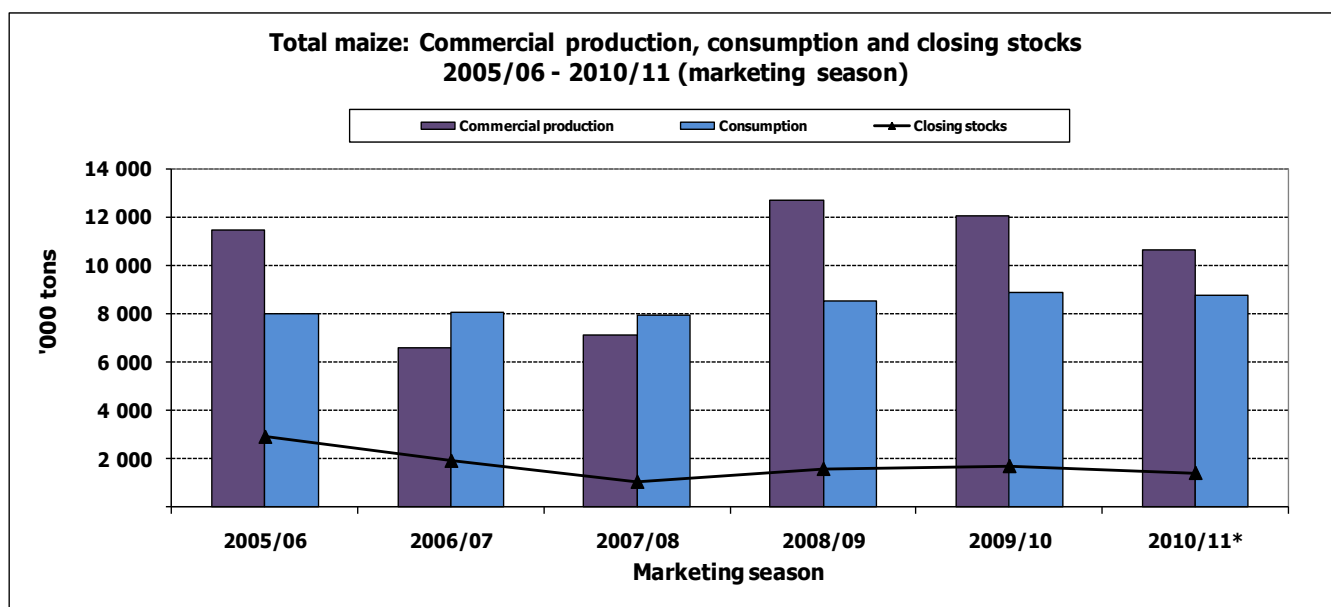
- Source: SAGIS, Directorate: Agricultural Statistics.
- *Other refers to grains released to end-consumers and/or withdrawn by producers, and retentions on farms.
- Figures might not add up correctly due to rounding.
- Marketing season for maize: May to April.
- Marketing season for sorghum: April to March.
- Early deliveries refer to the deliveries in March and April for maize and March for sorghum.
- Pipeline requirements are 45 days of commercial consumption.

4.2.2 Discussion of the 2010/11 maize and sorghum situation

The farmers intend to plant 1,645 million ha of white maize. When applying an average yield of 4,00 t/ha the total commercial production of white maize is projected at 6,578 million tons. The total supply of white maize is projected at 7,963 million tons for the 2010/11 marketing season. The total demand is projected at 7,210 million tons, including exports of 1,5 million tons, while the closing stock at the end of April 2011 is projected at 753 000 tons.

The farmers intend to plant 927 500 ha of yellow maize. When applying an average yield of 4,41 t/ha the total commercial production of yellow maize is projected at 4,094 million tons. The total supply of yellow maize, including imports of 400 000 tons is projected at 5,327 million tons for the 2010/11 marketing season. The total demand is projected at 4,663 million tons, including exports of 112 000 tons, while the closing stock at the end of April 2011 is projected at 664 000 tons.

Graph 4: Commercial production, consumption and closing stocks of total maize



*2010/11 – projection

From the graph it is evident that the consumption of maize is consistent at around 8 million tons and commercial production varies from one season to another. The projected closing stocks for the 2010/11 marketing season is 1,417 million tons, which is 16,70% less than the previous season (1,701 million tons). This decrease can mainly be attributed to the lower expected gross production of maize for the 2010/11 marketing season.

The farmers intend to plant 70 000 ha of sorghum. When applying an average yield of 2,86 t/ha the total commercial production of sorghum is projected at 200 200 tons. The total supply of sorghum, including imports of 10 000 tons is projected at 328 300 tons for the 2010/11 marketing season. The total demand is projected at 302 700 tons, including exports of 44 100 tons, while the closing stock at the end of March 2011 is projected at 25 600 tons.

5. Market information

5.1 Consumer Price Index (CPI)

The headline CPI (for all urban areas) annual inflation rate in November 2009 was 5,8%. This rate was 0,1% lower than the corresponding annual rate of 5,9% in October 2009. On average, prices remained unchanged between October 2009 and November 2009.

The food and non-alcoholic beverages index increased by 0,1% between October 2009 and November 2009. The annual rate decreased to 4,7% in November 2009 from 5,3% in October 2009. The monthly increase in the food and non-alcoholic beverages index was largely driven by monthly increases in fruit (5,5%), fish (0,7%), milk, eggs and cheese (0,6%), sugar, sweets and desserts (0,6%), hot beverages (0,6%), meat (0,5%) and cold beverages (0,5%). These increases were counteracted by monthly decreases in vegetables (-3,3%), oils and fats (-1,2%), bread and cereals (-0,2%) and other food (-0,1%).

The household contents and services index decreased by 0,4% between October 2009 and November 2009. The annual rate decreased to 4,2% in November 2009 from 4,8% in October 2009. The transport index remained unchanged between October 2009 and November 2009. The annual rate increased to -0,6% in November 2009 from -1,8% in October 2009. The recreation and culture index increased by 0,2% between October 2009 and November 2009. The annual rate decreased to 8,1% in November 2009 from 10,4% in October 2009.

The provinces with an annual inflation rate lower or equal to headline inflation were Limpopo (4,7%), North West (5,1%), KwaZulu-Natal (5,2%), Northern Cape (5,3%), Eastern Cape (5,5%) and Free State (5,5%). The provinces with an annual inflation rate higher than headline inflation were Western Cape (5,9%), Gauteng (5,9%) and Mpumalanga (6,6%).

5.2 Producer Price Index (PPI)

The Producer Price Index (PPI) for domestic output shows an annual rate of change of -1,2% in November 2009 (i.e. the PPI in November 2009 compared with November 2008). This rate is 2,1% higher than the corresponding annual rate of -3,3% in October 2009.

The higher annual rate in November 2009 compared with that in October 2009 can be explained by increases in the annual rate of change in the Producer Price Indices for:

- Products of petroleum and coal: The annual rate increased from -26,2% in October 2009 to -15,8% in November 2009;
- Mining and quarrying: The annual rate increased from -6,1% in October 2009 to -0,7% in November 2009;
- Agricultural products: The annual rate increased from -0,7% in October 2009 to 0,9% in November 2009;
- Forestry: The annual rate increased from -14,1% in October 2009 to -9,0% in November 2009;
- Basic metals: The annual rate increased from -13,4% in October 2009 to -12,5% in November 2009.

These increases were partially counteracted by a decrease in the annual rate of change for:

- Transport: The annual rate decreased from 1,5% in October 2009 to 0,8% in November 2009.

From October 2009 to November 2009 the PPI for domestic output increased by 0,8%. The monthly increase of 0,8% in the PPI for domestic output was mainly due to monthly contributions from increases in the price indices for mining and quarrying (0,6%), agricultural products (0,2%) and basic metals (0,1%).

5.3 Futures contract prices, the exchange rate and the oil price

Table 7: Closing prices at Friday, 4 December 2009

	1 year ago	The week ending 31 December 2009	The week ending 8 January 2010
RSA White Maize per ton (Jan contract)	R1 780	R1 655	R1 570
RSA Yellow Maize per ton (Jan contract)	R1 727	R1 575	R1 538
RSA Wheat per ton (Jan contract)	R2 600	R2 105	R2 070
RSA Soya-beans per ton (Jan contract)	R3 550	R3 225	R3 149
RSA Sunflower seed per ton (Jan contract)	R3 730	R3 390	R3 155
Exchange rate R/\$	R9,72	R7,37	R7,29
Oil price per barrel	\$42,94	\$73,75	\$82,06

Source: Weekly Price Watch, DAFF, 8 January 2010

All domestic grains recorded price decreases for the week ending 8 January 2010 as trading has slowed down due to the festive season. Local white and yellow maize prices decreased by 5,1% and 2,3%, respectively, compared to the previous week, while wheat, soybeans and sunflower prices declined by 1,7%, 2,4% and 6,9%, respectively. South Africa's Rand weakened the most among 16 major currencies versus the dollar after a drop in the price of gold, one of its biggest exports. The Rand closed the week at R7,29 to the dollar, while the oil price closed at \$82,06 a barrel on Friday, 8 January 2010.

5.4 Agricultural machinery sales

December tractor sales of 221 units were almost 50% less than the 440 units sold in December 2008. Overall tractor sales of 5 550 units in 2009 were almost 27% down on 2008 sales of 7 552 units. December combine harvester sales were significantly down on sales in December 2008. Overall combine harvester sales in 2009 were 275 units, 19% down on the 341 units sold in 2008.

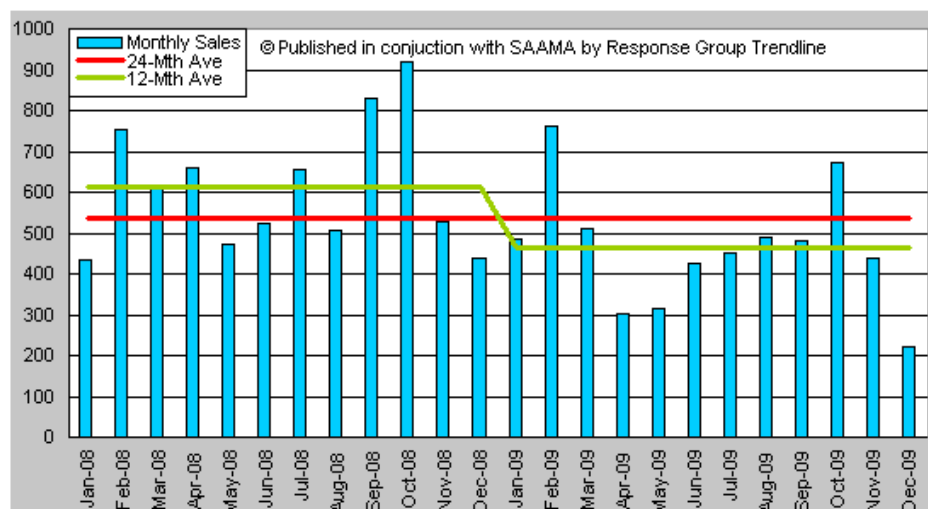
One of the main problems when comparing 2009 sales with that of 2008 is that the overall tractor and combine harvester sales in 2008 were exceptionally good. In perspective, therefore, 2009 sales were more closely aligned to the more "normal" sales levels experienced from 2005 to 2007.

Most of the fundamental factors affecting the market remain such as interest rates, the relatively low grain prices and tight bank finance. Potential purchasers of agricultural equipment are still very cautious, despite it still being very much a buyers' market. Weather conditions in most of the summer cropping areas have been quite good, with most crops now entering the critical January to February period when adequate rainfall is crucial to ensure good crop yields.

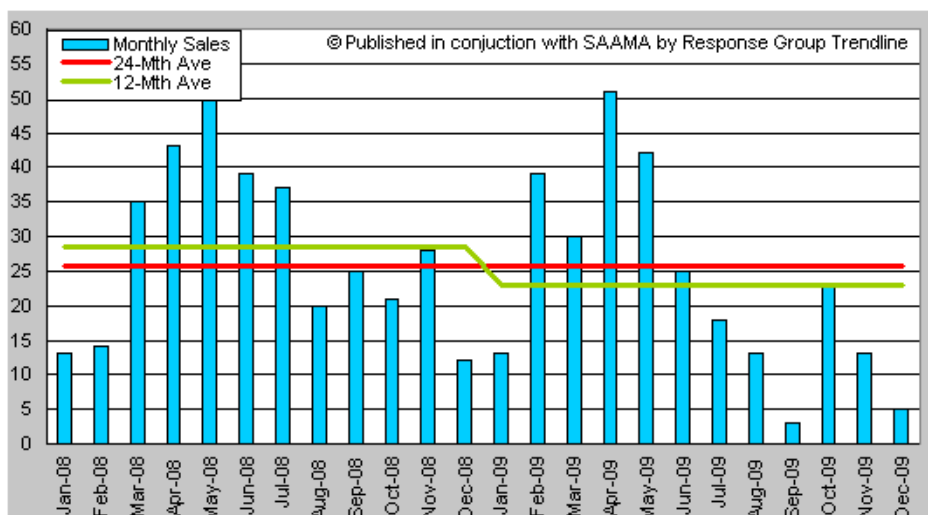
Table 8: Agricultural machinery sales

Equipment class	Year-on-year		Percentage Change %	Year-to-date		Percentage Change %
	December			December		
	2009	2008		2009	2008	
Tractors	221	440	-49,8	5 550	7 552	-26,5
Combine harvesters	5	12	-58,3	257	341	-19,4

Source: SAAMA press release, December 2009

Graph 5: Monthly sales (total market) of tractors for the past 24 months

Considering the 2009 tractor sales it is evident that the sales reached a peak in February 2009 and since then show a steady decline, except for October 2009.

Graph 6: Monthly sales (total market) of combine harvesters for the past 24 months

Considering the 2009 combine harvester sales, it is evident that there is a clear downward after sales slowed down during the latter part of 2009.

6. Acknowledgements

The Directorate: Agricultural Statistics makes use of information sourced from various institutions and organisations within South Africa in order to compile the monthly report on South Africa's Food Security Situation. This report has been compiled with the aid of information and reports sourced from the following institutions and organisations:

- Agfacts
- Agrimark Trends
- Department of Water Affairs (DWA)
- Farmer's Weekly
- Grain South Africa (GrainSA)
- National Agricultural Marketing Council (NAMC)
- National Chamber of Milling (NCM)
- South African Agricultural Machinery Association (SAAMA)
- South African National Seed Organisation (SANSOR)
- Standard Bank Economics Division
- Statistics South Africa (StatsSA)
- South African Futures Exchange (SAFEX)
- South African Reserve Bank
- The South African Grain Information Service (SAGIS)
- The South African Weather Service (WeatherSA)
- USDA Foreign Service
- UT Grain Management (Pty) Ltd