

MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA: OCTOBER 2013

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Directorate: Statistics and Economic Analysis

Highlights:

- During October 2013, significant rainfall events were limited to the eastern parts of the country, as well as the southern coastal regions.
- The expected size of commercial wheat crop for 2013 is 1,791 million tons, which is 4% less than the previous seasons' crop of 1,870 million tons.
- The projected closing stocks of wheat for the previous 2012/13 marketing year were 504 000 tons, which included imports of 1,396 million tons.
- The projected closing stocks of wheat for the current 2013/14 marketing year are 536 000 tons, which includes imports of 1,650 million tons.
- Commercial producers intend to plant 2,685 million ha of maize for 2014, which is 4% less than the 2,781 million ha planted last season.
- Projected closing stocks of maize for the current 2013/14 marketing year are 798 000 tons, which is 44% less than the previous year.
- Projected closing stocks of maize for the coming 2014/15 marketing year are 999 000 tons, which is 25% more than the previous year.
- The projected closing stocks of sorghum for the current 2013/14 marketing year are 49 900 tons, which is 3% more than the previous year.
- The projected closing stocks of sorghum for the coming 2014/15 marketing year are 55 000 tons, which is 10% more than the previous year.
- The headline CPI (for all urban areas) annual inflation rate in September 2013 was lower at 6,0%.
- The annual percentage change in the PPI for final manufactured goods was unchanged at 6,7% in September 2013.
- September tractor sales of 605 units were almost 5% lower than the 635 units reported in September 2012.



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1. Weather conditions

1.1 Rainfall for October 2013

During October 2013, significant rainfall events were limited to the eastern parts of the country, as well as the southern coastal regions (Figure 1). Comparing the rainfall totals for October 2013 to the long term average, most of the eastern and southern coastal regions, as well as the Mpumalanga Province received above-normal rainfall (Figure 2). The remaining regions received near-normal to below-normal rainfall for the mentioned period.

Figure 1: Rainfall (mm) for October 2013

Rainfall (mm) for October 2013
(Based on preliminary data)

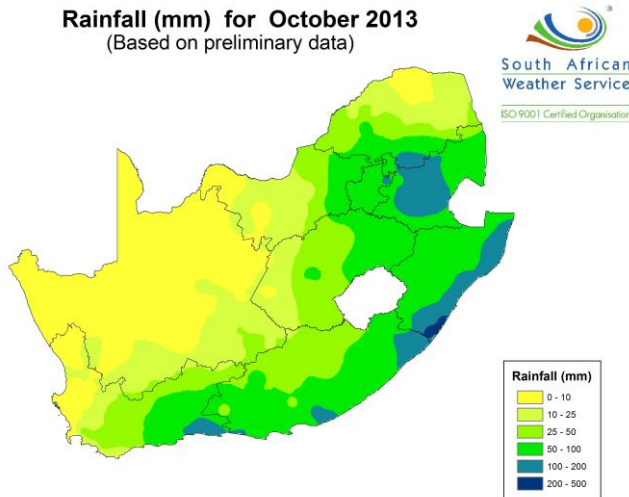
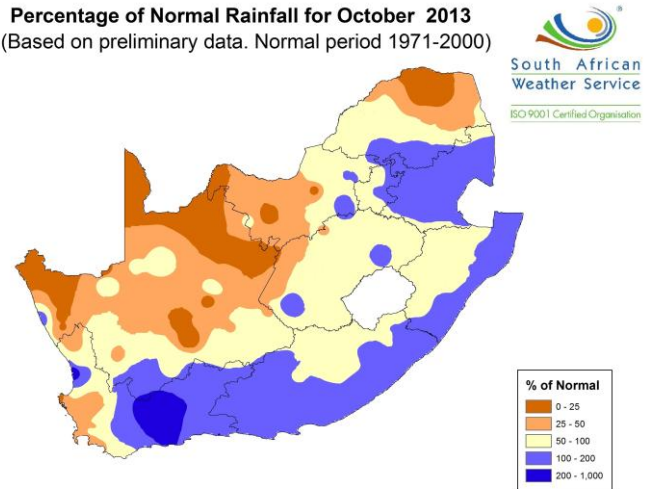


Figure 2: Percentage rainfall for October 2013

Percentage of Normal Rainfall for October 2013
(Based on preliminary data. Normal period 1971-2000)



1.2 Level of dams

Available information on the level of South Africa's dams on 28 October 2013 indicates that the country has approximately 74% of its full supply capacity (FSC) available, 8% less than the corresponding period in 2012. The KwaZulu-Natal and Limpopo provinces show increases for the mentioned period compared to last year. The Eastern Cape, Free State, Gauteng, Mpumalanga, North West and Northern, as well as Western Cape provinces show decreases for the mentioned period. The provincial distribution of South Africa's water supply (including Lesotho) is contained in Table 1 below.

Table 1: Level of dams, 28 October 2013

Province	Net FSC million cubic meters	28/10/2013 (%)	Last Year (%)	% Increase/Decrease 2013 vs 2012
Eastern Cape	1 814	72	82	-10,0
Free State	15 971	72	85	-13,0
Gauteng	115	72	90	-18,0
KwaZulu-Natal	4 529	79	73	6,0
Lesotho	2 376	68	70	-2,0
Limpopo	1 159	79	68	11,0
Mpumalanga	2 520	80	83	-3,0
North West	802	58	75	-17,0
Northern Cape	146	77	87	-10,0
Western Cape	1 854	90	93	-3,0
Total	31 286	74	82	-8,0

Source: Department of Water Affairs

2. Grain production

2.1 Summer grain crops

The Crop Estimates Committee (CEC) released the intentions of producers to plant commercial summer crops for 2014 on 24 October 2013; and is as follows:

Table 2: Intentions to plant of commercial summer crops for 2014

CROP	Intentions 2014 Ha	Area planted 2013 Ha	Final estimate 2013 Tons	Change %
	As mid October 2013		As on 26 September 2013	
	(A)		(C)	
White maize	1 553 000	1 617 200	5 580 300	-3,97
Yellow maize	1 132 000	1 164 000	6 142 250	-2,75
Maize	2 685 000	2 781 200	11 722 550	-3,46
Sunflower seed	620 000	504 700	566 600	22,85
Soya-beans	510 000	516 500	787 100	-1,26
Groundnuts	48 500	46 900	42 300	3,41
Sorghum	70 000	62 620	151 064	11,79
Dry beans	48 000	43 550	60 200	10,22
TOTAL	3 981 500	3 955 470	13 329 814	0,66

Note: Estimate is for calendar year, e.g. production season 2013/14 = 2014

- According to the results of the survey, commercial producers intend to plant 2,685 million ha of maize for 2014, which is 3,5% or 96 200 ha less than the 2,781 million ha planted last season.
- The figures show that producers intend to plant 1,553 million ha to white maize, which is 64 200 ha (4,0%) less than in the previous season. In the case of yellow maize, the expected plantings are 1,132 million ha, which is 32 000 ha (2,8%) less than in the previous season.
- Producers indicated that although rains have occurred over most of the eastern parts of the country, the drought in the western parts has still not been broken. Farmers are expected to plant more oilseeds such as sunflower seed at the expense of maize. However, the rainfall can still influence farmers' decisions.
- In the case of sunflower seed, the expected area planted is estimated at 620 000 ha, which is 22,8 % or 115 300 ha more than the 504 700 ha planted last season.
- The intended plantings of soya-beans shows a slight decrease of 1,3 % compared to the previous season – from 516 500 ha to 510 000 ha.
- The expected plantings of groundnuts increased by 3,4%, from 46 900 ha to 48 500 ha.
- The intended plantings of sorghum shows an increase of 11,8 % compared to the previous season – from 62 620 ha to 70 000 ha.
- The intended plantings of dry beans are expected to increase by 10,2%, from 43 550 ha to 48 000 ha.

At the forthcoming meeting of the Crop Estimates Liaison Committee to be held on 29 November 2013, the size of the summer grain crops for 2013 (past season) will be finalised.

2.2 Winter cereal crops

The revised area planted estimate and third production forecast for winter cereals for the 2013 production season was also released by the Crop Estimates Committee (CEC) on 24 October 2013, and is as follows:

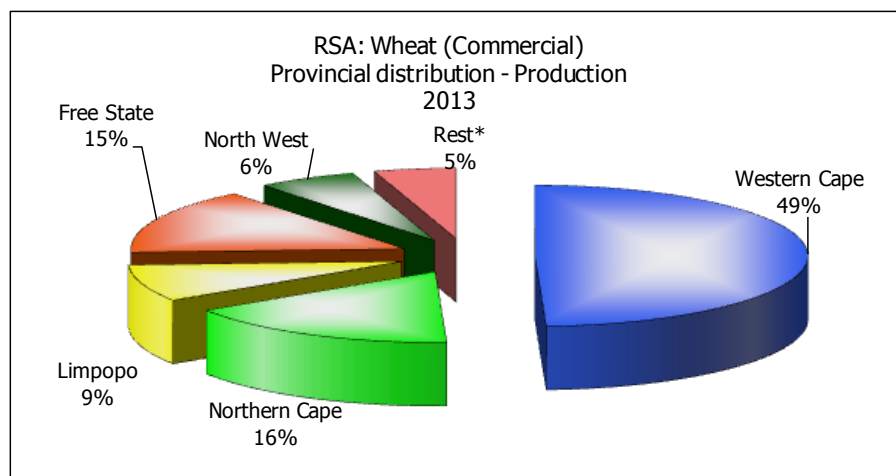
Table 3: Commercial winter crops: Revised area planted estimate and third production forecast- 2013 production season

CROP	Area planted 2013 Ha (A)	3rd forecast 2013 Tons (B)	Area planted 2012 Ha (C)	Final crop 2012 Tons (D)	Change % (A) ÷ (B)
Wheat	505 500	1 790 850	511 200	1 870 000	-4,23
Malting barley	81 320	280 961	84 940	298 000	-5,72
Canola	72 165	108 501	44 100	79 000	37,34
Total	658 985	2 180 312	640 240	2 247 000	-2,97

Note: Estimate is for calendar year, e.g. production season 2013/14 = 2013

- The expected production of wheat is 1,791 million tons, which is 4,2% less than the previous seasons' crop of 1,870 million tons, whilst the expected yield is 3,54 t/ha.
- The expected production in the Western Cape is 883 500 tons (49%), in the Northern Cape 294 000 tons (16%) and in the Free State 270 000 tons (15%).
- The area estimate for wheat for 2013 remained unchanged at 505 500 ha.
- The production forecast for malting barley is 280 961 tons, which is 5,7% less than the previous seasons' crop of 298 000 tons. The area planted is estimated at 81 320 ha, while the expected yield is 3,46 t/ha.
- The expected canola crop is 108 501 tons, which is 37,3% more than the previous seasons' crop of 79 000 tons. The area estimate for canola is 72 165 ha, with an expected yield of 1,50 t/ha.

Graph1: Provincial distribution of commercial wheat production for 2013



*Rest = Eastern Cape, KwaZulu-Natal, Mpumalanga and Gauteng.

Please note that the fourth production forecast for winter cereals for 2013 will be released on 26 November 2013.

3. Cereal balance sheets

Supply and demand data for September 2013 was released by SAGIS on 23 October 2013. *(Preliminary information is subject to change on a monthly basis).*

3.1 Winter cereals

Table 4: Supply and demand for Wheat as at 31 October 2013

Marketing year (October to September)	2011/12	2012/13*	2013/14*
Production & Calendar year	2011	2012	2013
	1000 tons	1000 tons	1000 tons
Supply			
Opening stocks: 1 October	478	651	504
SAGIS opening stocks	478	651	504
Gross production	2,008	1,883	1,800
Commercial production	1,973	1,839	1,756
Retentions by producers	27	35	35
Non-commercial	9	9	9
Total domestic supply	2,486	2,534	2,304
Plus: Imports	1,724	1,396	1,650
Total supply	4,210	3,930	3,954
Demand			
Commercial consumption	3,202	3,040	3,050
Human	3,066	3,008	3,020
Animal	136	32	30
Gristing	0	0	0
Retentions by producers	27	35	35
Withdrawn by producers	4	4	4
Released to end consumers	7	7	7
Seed for planting purposes	18	16	16
Balancing item	5	16	6
Non-commercial	9	9	9
Total domestic consumption	3,271	3,127	3,127
Plus: Exports	288	300	291
Products	19	21	21
Whole grain	269	278	270
Total demand	3,559	3,426	3,418
Closing stocks: 30 September	651	504	536
Pipeline requirements (80 days of human consumption)	672	659	662
Domestic shortfall / surplus	-1,457	-1,252	-1,485
Import gap	1,457	1,252	1,485
Surplus/Shortage above pipeline	-21	-155	-126

*Projection, Source: SAGIS, Directorate: Statistics and Economic Analysis, S&DE Report

- The closing stocks of wheat for the previous 2012/13 marketing year (ending 30 September 2013) were 504 000 tons, which was 22,6% less than the previous year (651 000 tons). This decrease could mainly be attributed to the lower production and lower import figures of wheat for the 2012 calendar year.
- The total supply of wheat for the current 2013/14 marketing year is projected at 3,954 million tons, including projected imports of 1,650 million tons.
- The total demand of wheat for the current 2013/14 marketing year is projected at 3,418 million tons, including exports of 291 000 tons. Thus, the closing stocks are 536 000 tons, which is 6,4% more than the 504 000 tons of the previous year.
- From 28 September 2013 up to 25 October 2013, the progressive grand total of imports is 186 274 tons, with the origin of imports from the Ukraine (102 434 tons or 55,0%), Russia (77 533 tons or 41,6%) and USA (6 307 or 3,4%). The progressive exports for the mentioned period are 9 211 tons.



3.2 Summer grains

Table 5: Supply and demand for White Maize as at 31 October 2013

Marketing Year: May – April	2012/13	2013/14*	2014/15*
Calendar Year	2012	2013*	2014*
	1000 tons	1000 tons	1000 tons
Supply			
Opening Stocks: 1 May	518	757	268
SAGIS Opening Stocks	518	757	268
Gross Production	7 423	6 040	6 672
Commercial production	6 880	5 473	6 105
Retentions by producers	114	107	107
Non-commercial	429	460	460
Total Domestic Supply	7 942	6 798	6 940
Imports	11		
Total Supply	7 953	6 798	6 940
Demand			
Commercial Consumption	5 047	4 890	4 890
Human	4 095	4 200	4 200
Animal	904	650	650
Gristing	48	40	40
Retentions by producers	98	91	91
Seed for planting purposes	16	16	16
Withdrawn by producers	36	31	31
Released to end-consumers	95	55	55
Balancing item	6	97	50
Non-commercial	429	460	460
Total Domestic Consumption	5 727	5 640	5 593
Exports	1 468	890	820
Products	68	70	70
Whole grain	1 400	820	750
Total Demand	7 195	6 530	6 413
Closing Stocks: 30 April	757	268	527
Pipeline Requirements (45 days of human & animal consumption + gristing)	622	603	603
Domestic Shortfall / Surplus	1 592	555	744
Surplus/ Shortage above pipeline	135	-335	-76

**Projection, Source: SAGIS, Directorate: Statistics and Economic Analysis, S&DE Report*

- Projected closing stocks of white maize for the current 2013/14 marketing year are 268 000 tons, which is 64,6% less than the previous year (757 000 tons). Projected closing stocks of white maize (based on the intentions to plant and a projected yield of 4,0 t/ha) for the coming 2014/15 marketing year are 527 000 tons, which is 96,7% more than the previous year (268 000 tons).
- From 27 April 2013 up to 25 October 2013, progressive white maize exports stand at 485 778 tons of which 190 097 tons or 39,1% were exported to Mexico, followed by the BLNS countries with 171 815 tons or 35,4% and Zimbabwe with 91 767 tons or 18,9%. No imports were reported for the mentioned period.



Table 6: Supply and demand for Yellow Maize as at 31 October 2013

Marketing Year: May - April	2012/13	2013/14*	2014/15*
Calendar Year	2012	2013*	2014*
	1000 tons	1000 tons	1000 tons
Supply			
Opening Stocks: 1 May	476	660	529
SAGIS Opening Stocks	476	660	529
Gross Production	5 578	6 357	5 875
Commercial production	5 049	5 757	5 275
Retentions by producers	319	385	385
Non-commercial	209	215	215
Total Domestic Supply	6 054	7 017	6 404
Imports		100	
Total Supply	6 054	7 117	6 404
Demand			
Commercial Consumption	3 888	4 253	4 253
Human	404	430	430
Animal	3 474	3 810	3 810
Gristing	10	13	13
Retentions by producers	304	370	370
Seed for planting purposes	15	15	15
Withdrawn by producers	102	100	100
Released to end-consumers	383	300	300
Balancing item	15	155	50
Non-commercial	209	215	215
Total Domestic Consumption	4 916	5 408	5 303
Exports	478	1 180	630
Products	65	80	60
Whole grain	413	1 100	570
Total Demand	5 394	6 588	5 933
Closing Stocks: 30 April	660	529	471
Pipeline Requirements (45 days of human & animal consumption + gristing)	479	524	524
Domestic Shortfall / Surplus	659	1 085	577
Surplus/ Shortage above pipeline	181	5	-53

**Projection, Source: SAGIS, Directorate: Statistics and Economic Analysis, S&DE Report*

- Projected closing stocks of yellow maize for the current 2013/14 marketing year are 529 000 tons, which is 19,8% less than the previous year (660 000 tons). Projected closing stocks of yellow maize (based on the intentions to plant and a projected yield of 5,0 t/ha) for the coming 2014/15 marketing year are 471 000 tons, which is 11,0% less than the previous year (529 000 tons).
- From 27 April 2013 up to 25 October 2013, progressive yellow maize exports stand at 1,006 million tons, with the main destinations being Japan (596 315 tons or 59,3%), followed by Taiwan (168 444 tons or 16,8%) and Korea (148 044 tons or 14,7%). No imports were reported for the mentioned period.

Table 7: Supply and demand for Maize as at 31 October 2013

Marketing Year: May - April	2012/13	2013/14*	2014/15*
Calendar Year	2012	2013*	2014*
	1000 tons	1000 tons	1000 tons
Supply			
Opening Stocks: 1 May	994	1 417	798
SAGIS Opening Stocks	994	1 417	798
Gross Production	13 001	12 398	12 547
Commercial production	11 930	11 231	11 380
Retentions by producers	433	492	492
Non-commercial	638	675	675
Total Domestic Supply	13 995	13 815	13 345
Imports	11	100	
Total Supply	14 006	13 915	13 345
Demand			
Commercial Consumption	8 935	9 143	9 143
Human	4 499	4 630	4 630
Animal	4 378	4 460	4 460
Gristing	58	53	53
Retentions by producers	402	461	461
Seed for planting purposes	31	31	31
Withdrawn by producers	138	131	131
Released to end-consumers	478	355	355
Balancing item	21	252	100
Non-commercial	638	675	675
Total Domestic Consumption	10 643	11 048	10 896
Exports	1 946	2 070	1 450
Products	133	150	130
Whole grain	1 813	1 920	1 320
Total Demand	12 589	13 118	12 346
Closing Stocks: 30 April	1 417	798	999
Pipeline Requirements (45 days of human & animal consumption + gristing)	1 102	1 127	1 127
Domestic Shortfall / Surplus	2 250	1 640	1 322
Surplus/ Shortage above pipeline	315	-329	-128

**Projection, Source: SAGIS, Directorate: Statistics and Economic Analysis, S&DE Report*

- Projected closing stocks of maize for the current 2013/14 marketing year are 798 000 tons, which is 43,7% less than the previous year (1,417 million tons). Projected closing stocks of maize (based on the intentions to plant and a projected yield) for the coming 2014/15 marketing year are 999 000 tons, which is 25,2% more than the previous year (798 000 tons).
- From 27 April 2013 up to 25 October 2013, the progressive grand total of exports is 1,491 million tons, with the largest quantity (596 315 tons or 40,0%) exported to Japan, followed by the BLNS countries (238 443 tons or 16,0%), Mexico (190 097 tons or 12,7%), Taiwan (168 444 tons or 11,3%), and Korea (148 044 tons or 9,9%). No imports were reported for the mentioned period.



Table 8: Supply and demand for Sorghum as at 31 October 2013

Marketing year: April - March	2012/13	2013/14*	2014/15*
Calendar year	2012	2013	2014*
	1000 tons	1 000 tons	1 000 tons
Supply			
Opening stocks: 1 April	52,1	48,3	49,9
SAGIS opening stocks	52,1	48,3	49,9
Gross production	157,0	180,7	214,2
Commercial production	133,2	151,1	184,7
Retentions by producers	3,5	4,4	4,3
Non-commercial	20,3	25,2	25,2
Total domestic supply	209,1	229,0	264,1
Plus: Imports	55,0	60,0	30,0
Total supply	264,1	289,0	294,1
Demand			
Food consumption	158,0	171,0	171,0
Indoor malting	12,8	13,0	13,0
Floor malting	56,7	58,0	58,0
Meal, rice & grits	88,5	100,0	100,0
Feed consumption	5,7	5,5	5,5
Pet food	0,9	1,0	1,0
Poultry	4,2	3,5	3,5
Livestock feed	0,6	1,0	1,0
Total commercial consumption	163,7	176,5	176,5
Retentions by producers	3,5	4,4	4,4
Withdrawn by producers	6,0	8,0	8,0
Released to end-consumers	2,5	3,5	3,5
Balancing item	0,8	6,5	6,5
Non-commercial	20,3	25,2	25,2
Total domestic consumption	196,8	224,1	224,1
Plus: Exports	19,0	15,0	15,0
Exports through border posts	15,7	11,7	11,7
Exports through harbours			
Products to African countries	3,3	3,3	3,3
Total demand	215,8	239,1	239,1
Closing stocks	48,3	49,9	55,0
Pipeline Requirements (45 days of human & animal consumption + gristing)	20,2	21,8	21,8
Domestic surplus / deficit	-7,9	-16,9	18,2
Import gap	7,9	16,9	-18,2
Surplus/ Shortage above pipeline	28,1	28,1	33,2

*Projection, Source: SAGIS, Directorate: Statistics and Economic Analysis, S&DE Report

- The total supply of sorghum for the current 2013/14 marketing year is estimated at 289 000 tons, including imports of 60 000 tons, which is the highest total recorded since the 75 100 tons in the 2002/03 marketing year. The total demand stands at 239 100 tons, which includes exports of 15 000 tons for the above-mentioned period.
- The expected closing stocks of sorghum for the current 2013/14 marketing year show a surplus of 49 900 tons, which is 3,3% more than the previous year (48 300 tons).
- The projected production of sorghum for the 2014/15 marketing year is estimated at 189 000 tons (based on the intentions to plant and a projected yield of 2,7 t/ha). The total supply is projected at 294 100 tons including imports of 30 000 tons.
- The projected closing stocks of sorghum for the coming 2014/15 marketing year is 55 000 tons, which is 10,2% more than the previous year (49 900 tons) and exports is projected at 15 000 tons for the same period.



4. Market information

4.1 Consumer Price Index (CPI)

- The headline CPI (for all urban areas) annual inflation rate in September 2013 was 6,0%. This rate was 0,4% lower than the corresponding annual rate of 6,4% in August 2013. On average, prices increased by 0,5% between August 2013 and September 2013.
- The food and non-alcoholic beverages index increased by 0,8% between August 2013 and September 2013. The annual rate decreased to 5,9% in September 2013 from 7,1% in August 2013. The following components in the food and non-alcoholic beverages index increased: Bread and cereals (1,5%), hot beverages (1,4%), fruit (1,3%), cold beverages (1,2%), oils and fats (1,0%), vegetables (1,0%), milk, eggs and cheese (0,7%), other food (0,7%), meat (0,4%), fish (0,3%) and sugar, sweets and desserts (0,3%).
- The housing and utilities index increased by 0,8% between August 2013 and September 2013, mainly due to a 1,2% increase in actual rentals for housing and owners' equivalent rent. The annual rate was unchanged at 5,4% in September 2013. The household contents and services index increased by 1,1% between August 2013 and September 2013. The annual rate increased to 3,8% in September 2013 from 3,0% in August 2013.
- The transport index increased by 0,3% between August 2013 and September 2013. The annual rate decreased to 6,9% in September 2013 from 8,7% in August 2013.
- The communication index decreased by 0,3% between August 2013 and September 2013. The annual rate decreased to 1,7% in September 2013 from 2,0% in August 2013.
- The recreation and culture index increased by 0,5% between August 2013 and September 2013. The annual rate was unchanged at 3,6% in September 2013.
- The provinces with an annual inflation rate lower than or equal to headline inflation were Western Cape (6,0%), Northern Cape (5,9%), KwaZulu-Natal (5,8%), Mpumalanga (5,7%), Eastern Cape (5,6%) and North West (4,9%). The provinces with an annual inflation rate higher than headline inflation were Limpopo (6,3%), Free State (6,2%) and Gauteng (6,1%).

4.2 Producer Price Index (PPI)

- The annual percentage change in the PPI for final manufactured goods was 6,7% in September 2013 (compared with 6,7% in August 2013). From August 2013 to September 2013 the PPI for final manufactured goods increased by 0,4%.
- The main contributors to the annual rate of 6,7% were food products, beverages and tobacco products (6,1% year-on-year and contributing 2,1%), as well as coke, petroleum, chemical, rubber and plastic products (7,4% year-on-year and contributing 1,3%). The contributors to the monthly increase of 0,4% were food products, beverages and tobacco products (0,3% month-on-month and contributing 0,1%), textiles, clothing and footwear (1,3% month-on-month and contributing 0,1%), coke, petroleum, chemical, rubber and plastic products (0,6% month-on-month and contributing 0,1%), as well as metals, machinery and computing equipment (0,5% month-on-month and contributing 0,1%).
- The annual percentage change in the PPI for mining was 4,1% in September 2013 (compared with 10,4% in August 2013). From August 2013 to September 2013 the PPI for mining decreased by 2,7%. The main contributors to the annual rate of 4,1% were non-ferrous metal ores (5,8% year-on-year and contributing 2,7%), as well as coal and gas (6,5% year-on-year and contributing 1,6%). The main contributor to the monthly decrease of 2,7% was non-ferrous metal ores (-4,0% month-on-month and contributing -1,9%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 4,5% in September 2013 (compared with 3,5% in August 2013). From August 2013 to September 2013 the PPI for agriculture, forestry and fishing increased by 2,7%. The main contributor to the annual rate of 4,5% was agriculture (4,3% year-on-year and contributing 3,3%). The main contributor to the monthly increase of 2,7% was agriculture (3,3% month-on-month and contributing 2,5%).

4.3 Future contract prices and the exchange rate

Table 9: Closing prices on Friday, 1 November 2013

	1 November 2013	1 October 2013	% Change
RSA White Maize per ton (Nov. 2013 contract)	R2 401,00	R2 336,00	2,78
RSA Yellow Maize per ton (Nov. 2013 contract)	R2 300,00	R2 129,00	8,03
RSA Wheat per ton (Nov. 2013 contract)	R3 477,00	R3 423,00	1,58
RSA Sunflower seed per ton (Nov. 2013 contract)	R5 520,00	R5 125,00	7,71
RSA Soya-beans per ton (Mar. 2014 contract)	R5 310,00	R5 125,00	3,61
Exchange rate R/\$	R10,09	R10,05	0,40

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- September tractor sales of 605 units were almost 5% lower than the 635 units reported in September 2012. On a year-to-date basis, tractor sales are approximately 5% down on those of the first nine months of last year. September combine harvester sales of 21 units were two units down on the 23 units sold in September 2012. On a year-to-date basis combine harvester sales are 6% up on sales for the same period last year.
- While there is still optimism in the market, most farmers in the summer cropping areas are waiting for rain. This is particularly true in some of the central regions and in the west of the country. Soil conditions are very dry in these areas and it will take some significant rainfall before these lands can be prepared for planting. It is this, probably more than anything else, which is holding activity back in the agricultural machinery market. Nevertheless, most of the fundamentals affecting the industry remain positive and expectations are that once the rains come, the market will pick up again.
- Current industry expectations are that tractor sales in the 2013 calendar year will be of the order of 7 000 to 7 500 units, between 5 and 10% down on 2012 sales.

Table 10: Agricultural machinery sales

Equipment class	Year-on-year		Percentage Change %	Year-to-date		Percentage Change %
	September			September		
	2013	2012		2013	2012	
Tractors	605	635	-4,7	5 677	6 002	-5,4
Combine harvesters	21	23	-8,7	300	283	6,0

Source: SAAMA press release, October 2013



5. Acknowledgements

The Directorate: Statistics and Economic Analysis 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
- Department of Water Affairs (DWA)
- Farmer's Weekly
- Grain South Africa (GrainSA)
- IGC Grain Market Report
- National Agricultural Marketing Council (NAMC)
- South African Agricultural Machinery Association (SAAMA)
- South African Futures Exchange (SAFEX)
- South African Reserve Bank
- Statistics South Africa (Stats SA)
- The South African Grain Information Service (SAGIS)
- The South African Weather Service (WeatherSA)
- USDA Foreign Service
- UT Grain Management (Pty) Ltd
- Weekly Price Watch, DAFF