

# **MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA: FEBRUARY 2011**

**Issued: 7 March 2011**

**Directorate: Statistics and Economic Analysis**

## **Highlights:**

- **The weather conditions in the eastern parts of the country have been less than favourable in the month of February.**
- **The expected production of maize is 11,044 million tons, which is 13,8% less than the 12,815 million tons of the previous season.**
- **The expected production of wheat is 1,465 million tons, which is 25,2% less than the previous seasons' crop of 1,958 million tons.**
- **The projected closing stocks of wheat for the 2010/11 marketing season is 519 000 tons, which includes imports of 1,7 million tons.**
- **The projected closing stocks of maize for the 2010/11 marketing season is 2,840 million tons. Thus, more than enough maize will be available for local consumption and to meet export demand.**
- **The projected closing stocks of maize for the coming 2011/12 marketing season is 1,718 million tons. Thus, enough maize will be available for local consumption and to meet export demand.**
- **The headline CPI (for all urban areas) annual inflation rate in January 2011 was higher at 3,7%.**
- **The annual percentage change in the PPI was lower at 5,5% in January 2011.**
- **January tractor sales of 428 units were 8,1% up on the 396 units sold in January 2010.**



**agriculture,  
forestry & fisheries**

Department:  
Agriculture, Forestry and Fisheries  
REPUBLIC OF SOUTH AFRICA

Enquiries: Marda Scheepers or Queen Sebidi

Directorate: Statistics and Economic Analysis

Tel: +27 12 319 8033/8164

Tel: +27 12 319 8031

Email: [MardaS@daff.gov.za](mailto:MardaS@daff.gov.za) or [QueenS@daff.gov.za](mailto:QueenS@daff.gov.za)

## Contents

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<b>1. Weather conditions</b>	<b>3</b>
<b>2. Grain production</b>	<b>4</b>
<b>2.1 Summer grain crops</b>	<b>4</b>
<b>2.2 Winter cereal crops</b>	<b>5</b>
<b>3. Cereal balance sheets</b>	<b>6</b>
<b>3.1 Winter cereals</b>	<b>6</b>
<b>3.2 Summer grains</b>	<b>7</b>
<b>4. Market information</b>	<b>8</b>
<b>4.1 Consumer Price Index (CPI)</b>	<b>8</b>
<b>4.2 Producer Price Index (PPI)</b>	<b>9</b>
<b>4.3 Food price monitor – February 2011</b>	<b>9</b>
<b>4.4 Future contract prices and the exchange rate</b>	<b>10</b>
<b>4.5 Agricultural machinery sales</b>	<b>10</b>
<b>5. Acknowledgements</b>	<b>11</b>

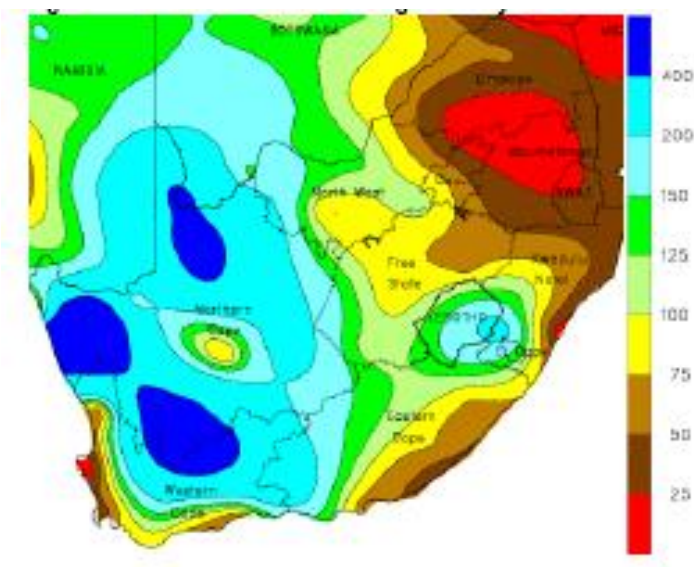


## 1. Weather conditions

### 1.1 Rainfall for February 2011

The weather conditions in the eastern parts of the country have been less than favourable in the month of February. Figure 1 presents the % of normal rainfall during the month of February 2011. From the rainfall map it can be seen that below-normal rainfall was seen in Mpumalanga and parts of the eastern Free State. This could probably have a negative impact on the South African maize and soybean yield estimates.

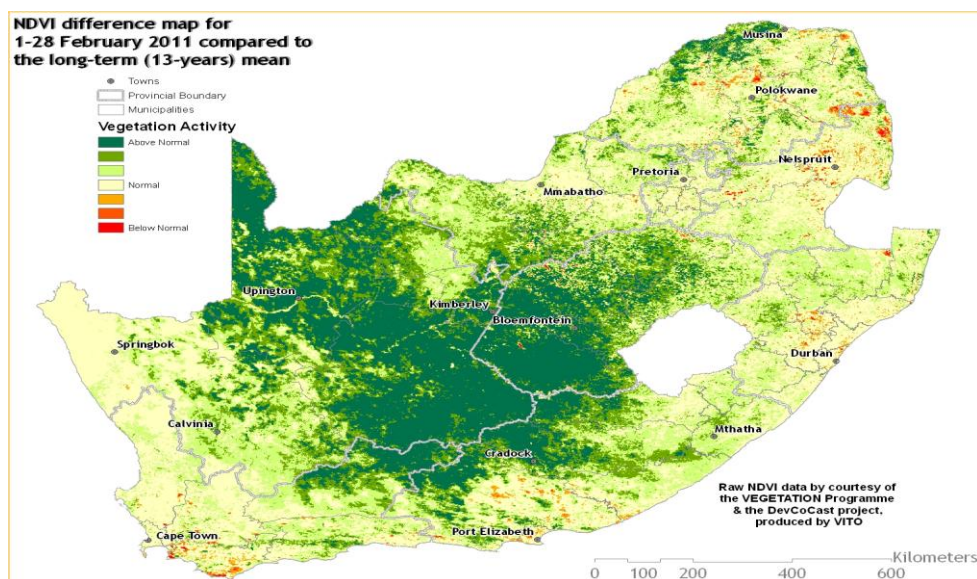
**Figure 1: Percentage of normal rainfall during the month of February 2011.**



### 1.2 Vegetation activity

Vegetation conditions for February 2011 were normal to below-normal throughout most of the country. Below-normal vegetation activity is especially evident along the eastern border and southern- and western coastal region. Above-normal vegetation activity is evident in the central areas with specific reference to the Northern Cape, North West and Free State provinces.

**Figure 2: The NDVI difference map for 1-28 February 2011 compared to the 13 year long term mean**



## 2. Grain production

### 2.1 Summer grain crops

The revised area planted estimate and first production forecast of summer grain crops for the 2010/11 production season, was released by the Crop Estimates Committee (CEC) on 24 February 2011, and is as follows:

**Table 1: Commercial summer crops: Revised area planted estimate and first production forecast - 2010/11 production season**

Summer field crops	Area planted 2010/11 Ha (A)	1 <sup>st</sup> forecast 2010/11 Tons (B)	Area planted 2009/10 Ha (C)	Final crop 2009/10 Tons (D)	Change % (B) ÷ (D)
White Maize	1 418 300	6 364 000	1 719 700	7 830 000	-18,72
Yellow Maize	965 000	4 680 000	1 022 700	4 985 000	-6,12
Total Maize	2 383 300	11 044 000	2 742 400	12 815 000	-13,82
Sunflower seed	619 700	808 420	397 700	490 000	+64,98
Soya-beans	418 000	729 050	311 450	566 000	+28,81
Groundnuts	54 650	84 525	57 450	88 000	-3,95
Sorghum	70 200	209 300	86 675	196 500	+6,51
Dry beans	41 900	53 200	44 100	52 255	+1,81
Total	3 587 750	12 928 495	3 639 775	14 207 755	-9,00

- The revised area estimate for **maize** is 2,383 million ha, which is 13,09% or 359 100 ha less than the 2,742 million ha planted for the previous season. The expected commercial maize crop is 11,044 million tons, which is 13,82% less than the 12,815 million tons of the previous season. The expected yield is 4,63 t/ha as against 4,67 t/ha of the previous season.
- The area estimate for white maize is 1,418 million ha, which represents a decrease of 17,53% or 301 400 ha compared to the 1,720 million ha planted last season. In the case of yellow maize the area estimate is 965 000 ha, which is 5,64% or 57 700 ha less than the 1,023 million ha planted last season.
- The production forecast of **white maize** is 6,364 million tons, which is 18,72% less than the 7,830 million tons of last season. The yield for white maize is 4,49 t/ha as against 4,55 t/ha the previous season. In the case of **yellow maize** the production forecast is 4,680 million tons, which is 6,12% less than the 4,985 million tons of last season. The yield for yellow maize is 4,85 t/ha as against 4,87 t/ha the previous season.
- The production forecast for **sunflower seed** is 808 420 tons, which is 64,98% more than the 490 000 tons of the previous season. The revised area estimate for sunflower seed is 619 700 ha, which is 55,82% more than the 397 700 ha planted the previous season. The expected yield is 1,30 t/ha as against 1,23 t/ha of the previous season.
- The production forecast for **soya-beans** is 729 050 tons, which is 28,81% more than the 566 000 tons of the previous season. It is estimated that 418 000 ha have been planted to soya-beans, which represents an increase of 34,21% compared to the 311 450 ha planted last season. The expected yield is 1,74 t/ha as against 1,82 t/ha last season.

- The expected **groundnut** crop is 84 525 tons, which is 3,95% less than the 88 000 tons of last season. For groundnuts the area estimate is 54 650 ha, which is 4,87% less than the 57 450 ha planted for the previous season. The expected yield is 1,55 t/ha as against 1,53 t/ha last season.
- The production forecast for **sorghum** is 209 300 tons, which is 6,51% higher than the 196 500 tons of the previous season. The area estimate for sorghum decreased by 19,01%, from 86 600 ha to 70 200 ha against the previous season. The expected yield is 2,98 t/ha as against 2,27 t/ha of the previous season.
- In the case of **dry beans** the production forecast is 53 200 tons, which is 1,81% more than the 52 255 tons of the previous season. For dry beans, the area estimate is 41 900 ha, which is 4,99% less than the 44 100 ha planted for the previous season. The expected yield is 1,27 t/ha as against 1,18 t/ha of the previous season.

*The area planted and second production forecast of summer grain crops for the 2010/11 production season will be released on 24 March 2011.*

## 2.2 Winter cereal crops

The revised area planted and final production estimate for winter cereal crops for the 2010 production season, was also released by the CEC on 24 February 2011, and is as follows:

**Table 2: Commercial winter cereal crops: Revised area planted and final production estimate - 2010 production season**

Winter cereal crops	Area planted 2010 Ha (A)	Final estimate 2010 Tons (B)	Area planted 2009 Ha (C)	Final estimate 2009 Tons (D)	Change % (B) ÷ (D)
Wheat	558 100	1 464 970	642 500	1 958 000	-25,18
Malting barley	82 670	200 035	74 760	216 000	-7,39
Canola	34 820	37 620	35 060	40 350	-6,77
Total	675 590	1 702 955	752 320	2 214 350	-23,09

- The expected production of **wheat** is 1,465 million tons, which is 25,2% less than the previous seasons' crop of 1,958 million tons. The area estimate for wheat is 558 100 ha, with an expected yield of 2,62 t/ha.
- The production forecast for **malting barley** is 200 035 tons, which is 7,4% less than the previous seasons' crop of 216 000 tons. The area planted is estimated at 82 670 ha, while the expected yield is 2,42 t/ha.
- The expected **canola** crop is 37 620 tons, which is 6,8% lower than the previous seasons' crop of 40 350 tons. The area estimate for canola is 34 820 ha, while the expected yield is 1,09 t/ha.

Please note that the intentions to plant winter cereals for the 2011 production season will be released on 20 April 2011.

### 3. Cereal balance sheets

Supply and demand data for January 2011 was released by SAGIS on 23 February 2011. *(Preliminary information is subject to change on a monthly basis.)*

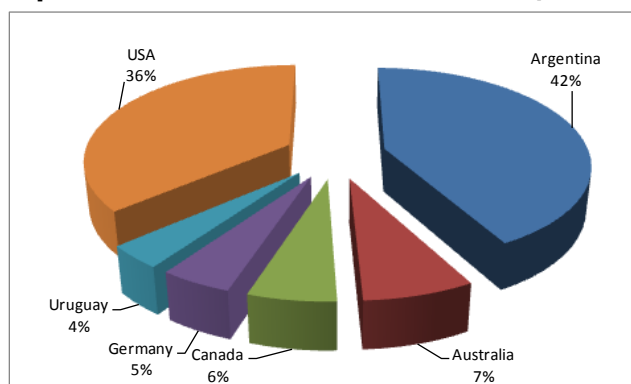
#### 3.1 Winter cereals

**Table 3:**

<b>2010/11 Projected Wheat Balance Sheet as at 28 February 2011</b> (1000 tons)	<b>Wheat</b> (October to September)
<b>Supply</b>	
<b>Opening stocks (October 2010)</b>	<b>579</b>
SAGIS Opening Stocks	579
<b>Gross production (2010 season)</b>	<b>1 472</b>
Commercial production	1 465
Subsistence agriculture	7
<b>Total domestic supply</b>	<b>2 051</b>
Plus: Imports	1 700
<b>Total supply</b>	<b>3 751</b>
<b>Demand</b>	
<b>Consumption</b>	<b>2 990</b>
Commercial: Human	2 885
Animal (feed)	21
Retentions by producers	42
Seed for planting purposes	22
Other (released to end consumers +withdrawn by producers +retentions by producers)	20
<b>Subsistence agriculture</b>	<b>7</b>
<b>Total domestic consumption</b>	<b>2 997</b>
Plus: Exports	<b>235</b>
<b>Total demand</b>	<b>3 232</b>
<b>Closing stocks (September 2011)</b>	<b>519</b>
<b>Pipeline requirements</b> (80 days of human (food) consumption)	<b>632</b>
<b>Domestic shortfall</b>	<b>-1 578</b>
<b>Import gap</b>	<b>1 578</b>
<b>Shortage above pipeline</b>	<b>-113</b>
<b>SAGIS closing stocks as at end of January 2011</b>	<b>1 340</b>

- The projected closing stocks of wheat for the 2010/11 marketing season is 519 000 tons, which is 10,4% less than the previous season (579 000 tons). This decrease can mainly be attributed to the smaller wheat crop for the current 2010/11 marketing season.

**Graph 1: Major countries of imports of wheat for South Africa: 2010/11 marketing season**



- From 2 October 2010 up to 25 February 2011, the progressive wheat imports stands at 660 446 tons. To meet local demand, total imports is projected at 1,7 million tons of wheat, the largest quantity ever recorded. In order to achieve this, an average shipment rate of 140 000 tons per month of imports is required.

### 3.2 Summer grains

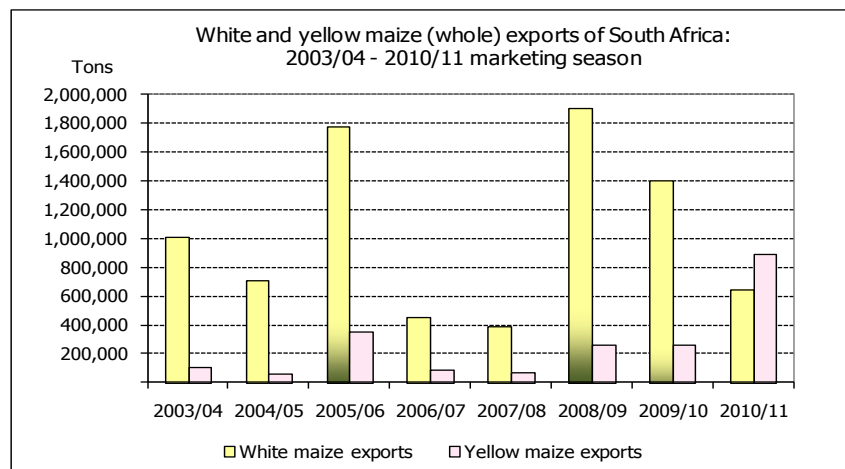
**Table 4:**

2010/11 Projected Annual Cereal Balance Sheet as at 28 February 2011 (1 000 tons)	Maize (May to April)			Sorghum (April to March)
	White	Yellow	Total	
<b>Supply</b>				
<b>Opening stocks</b>	<b>1 362</b>	<b>769</b>	<b>2 131</b>	<b>93,2</b>
SAGIS Opening Stocks	1 362	769	2 131	93,2
<b>Gross production</b>	<b>8 252</b>	<b>5 169</b>	<b>13 421</b>	<b>235,9</b>
Commercial production	7 830	4 985	12 815	196,5
Subsistence agriculture	422	184	606	39,4
<b>Total domestic supply</b>	<b>9 614</b>	<b>5 938</b>	<b>15 552</b>	<b>329,1</b>
Plus: Imports	-	-	-	-
<b>Total supply</b>	<b>9 614</b>	<b>5 938</b>	<b>15 552</b>	<b>329,1</b>
<b>Demand</b>				
<b>Consumption</b>	<b>6 128</b>	<b>4 018</b>	<b>10 146</b>	<b>213,6</b>
Commercial: Human	4 200	340	4 540	182,8
Animal (feed)	1 500	2 800	4 300	8,8
Gristing	60	20	80	-
Seed for planting purposes	16	14	30	-
Other (grains released to end-consumers + withdrawn by producers + retentions on farms)	352	844	1 196	22,0
<b>Subsistence agriculture</b>	<b>422</b>	<b>184</b>	<b>606</b>	<b>39,4</b>
<b>Total domestic consumption</b>	<b>6 550</b>	<b>4 202</b>	<b>10 752</b>	<b>253,0</b>
<b>Plus: Exports</b>	<b>860</b>	<b>1 100</b>	<b>1 960</b>	<b>31,9</b>
Products	60	50	110	-
Whole maize	800	1 050	1 850	-
<b>Total demand</b>	<b>7 410</b>	<b>5 302</b>	<b>12 712</b>	<b>284,9</b>
<b>Closing stocks (2011)</b>	<b>2 204</b>	<b>636</b>	<b>2 840</b>	<b>44,2</b>
<b>Pipeline requirements</b> (45 days of commercial consumption)	<b>710</b>	<b>390</b>	<b>1 100</b>	<b>23,6</b>
<b>Domestic surplus</b>	<b>2 354</b>	<b>1 346</b>	<b>3 700</b>	<b>52,5</b>
<b>Surplus/ shortage above pipeline</b>	<b>1 494</b>	<b>246</b>	<b>1 740</b>	<b>20,6</b>
<b>SAGIS closing stocks as at end of January 2011</b>	<b>3 690</b>	<b>1 528</b>	<b>5 218</b>	<b>86,3</b>

Source: SAGIS, Directorate: Agricultural Statistics.

- The projected closing stocks of maize for the current 2010/11 marketing season is 2,840 million tons, which is 33,3% more than the previous season (2,131 million tons). This increase can mainly be attributed to the higher production of maize during the 2009/10 production season.
- Closing stocks of sorghum at the end of March 2011 are estimated at 44 200 tons, which is considerable less (52,6%) than the previous season (93 200 tons). This decrease can mainly be attributed to the smaller sorghum crop of the 2009/10 production season.

**Graph 2: White and yellow maize exports from South Africa: 1 May 2010 to 25 February 2011**



- From 1 May 2010 up to 25 February 2011, the progressive white and yellow maize exports stands at 647 529 and 895 037 tons, respectively. This brings the progressive grand total of exports to 1,543 million tons (Source: SAGIS).
- It is important to note that for the current marketing season yellow maize exports surpassed white maize exports. White maize exports thus, has to increase as it is specifically white maize that has a high ending stock for the mentioned marketing season.



**Table 5:**

<b>2011/12 Projected Annual Cereal Balance Sheet as at 28 February 2011</b> (1 000 tons)	<b>Maize (May to April)</b>			<b>Sorghum</b>
	<b>White</b>	<b>Yellow</b>	<b>Total</b>	<b>(April to March)</b>
<b>Supply</b>				
<b>Opening stocks</b>	<b>2 204</b>	<b>636</b>	<b>2 840</b>	<b>44,2</b>
SAGIS Opening Stocks	2 204	636	2 840	44,2
<b>Gross production</b>	<b>6 786</b>	<b>4 864</b>	<b>11 650</b>	<b>248,7</b>
Commercial production	6 364	4 680	11 044	209,3
Subsistence agriculture	422	184	606	39,4
<b>Total domestic supply</b>	<b>8 990</b>	<b>5 500</b>	<b>14 490</b>	<b>292,9</b>
Plus: Imports	-	-	-	-
<b>Total supply</b>	<b>8 990</b>	<b>5 500</b>	<b>14 490</b>	<b>292,9</b>
<b>Demand</b>				
<b>Consumption</b>	<b>5 998</b>	<b>4 128</b>	<b>10 126</b>	<b>204,8</b>
Commercial: Human	4 270	330	4 600	179,8
Animal (feed)	1 300	3 000	4 300	9,3
Gristing	60	20	80	-
Seed for planting purposes	16	14	30	-
Other (grains released to end-consumers + withdrawn by producers + retentions on farms)	352	764	1 116	15,7
<b>Subsistence agriculture</b>	<b>422</b>	<b>184</b>	<b>606</b>	<b>39,4</b>
<b>Total domestic consumption</b>	<b>6 420</b>	<b>4 312</b>	<b>10 732</b>	<b>244,2</b>
<b>Plus: Exports</b>	<b>1 280</b>	<b>760</b>	<b>2 040</b>	<b>27,8</b>
Products	55	45	100	-
Whole maize	1 225	715	1 940	-
<b>Total demand</b>	<b>7 700</b>	<b>5 072</b>	<b>12 772</b>	<b>272,0</b>
<b>Closing stocks (2012)</b>	<b>1 290</b>	<b>428</b>	<b>1 718</b>	<b>20,9</b>
<b>Pipeline requirements</b> (45 days of commercial consumption)	<b>694</b>	<b>413</b>	<b>1 107</b>	<b>23,3</b>
<b>Domestic surplus</b>	<b>1 876</b>	<b>775</b>	<b>2 651</b>	<b>25,4</b>
<b>Surplus/ shortage above pipeline</b>	<b>596</b>	<b>15</b>	<b>611</b>	<b>-2,4</b>

Source: SAGIS, Directorate: Agricultural Statistics.

- The projected closing stocks of maize for the 2011/12 marketing season is 1,718 million tons, which is 39,5% less than the previous season (2,840 million tons). This decrease can mainly be attributed to the expected lower area planted to maize during the 2010/11 production season.
- The projected closing stocks of sorghum for the 2011/12 marketing season is 20 900 tons, the smallest ever recorded. It is also 52,7% less than the previous seasons' closing stock of 44 200 tons.

## 4. Market information

### 4.1 Consumer Price Index (CPI)

- The headline CPI (for all urban areas) annual inflation rate in January 2011 was 3,7%. This rate was 0,2% higher than the corresponding annual rate of 3,5% in December 2010. On average, prices increased by 0,4% between December 2010 and January 2011.
- The food and non-alcoholic beverages index increased by 2,2% between December 2010 and January 2011. The annual rate increased to 3,1% in January 2011 from 1,5% in December 2010.
- The following components in the food and non-alcoholic beverages index increased: Fruit (7,1%), oils and fats (4,9%), meat (4,0%), sugar, sweets and desserts (1,9%), vegetables (1,7%), other food (1,6%), cold beverages (1,5%), hot beverages (1,4%), fish (1,1%), bread and cereals (0,5%) and milk, eggs and cheese (0,5%).



- The transport index increased by 0,5% between December 2010 and January 2011, mainly due to a 29c/l increase in the price of petrol. The annual rate increased to 2,5% in January 2011 from 1,6% in December 2010.
- The provinces with an annual inflation rate lower than or equal to headline inflation were Gauteng (3,7%), North West (3,6%), Limpopo (3,6%), Western Cape (3,5%), Mpumalanga (3,4%) and KwaZulu-Natal (2,9%). The provinces with an annual inflation rate higher than headline inflation were Free State (4,6%), Eastern Cape (4,3%) and Northern Cape (3,8%).

#### **4.2 Producer Price Index (PPI)**

- The Producer Price Index (PPI) for domestic output shows an annual rate of change of 5,5% in January 2011 (i.e. the PPI in January 2011 compared with January 2010). This rate is 0,3% lower than the corresponding annual rate of 5,8% in December 2010.
- This lower annual rate in January 2011 can be explained by a decrease in the annual rate of change in the Producer Price Index for:
  - Mining and quarrying: The annual rate decreased from 10,7% in December 2010 to 5,8% in January 2011.
- This decrease was partially counteracted by increases in the annual rate of change for:
  - Paper and paper products: The annual rate increased from 2,5% in December 2010 to 3,8% in January 2011;
  - Products of petroleum and coal: The annual rate increased from 3,0% in December 2010 to 8,3% in January 2011;
  - Chemicals and chemical products: The annual rate increased from 2,5% in December 2010 to 5,0% in January 2011;
  - Rubber and plastic products: The annual rate increased from 1,9% in December 2010 to 2,2% in January 2011;
  - Basic metals: The annual rate increased from 5,5% in December 2010 to 6,5% in January 2011; and
  - Furniture: The annual rate increased from 4,9% in December 2010 to 6,7% in January 2011.
- From December 2010 to January 2011 the PPI for domestic output increased by 1,1%.
- The monthly increase of 1,1% in the PPI for domestic output was mainly due to monthly contributions from increases in the price indices of mining and quarrying (0,7%), products of petroleum and coal (0,3%), basic metals (0,1%) and all other groups (0,1%). These increases were partially counteracted by a decrease in the price index of agriculture.

#### **4.3 Food price monitor – February 2011**

- According to the latest Food Price Monitor by the National Agricultural Marketing Council (NAMC) - in January 2011, rural consumers paid R17,55 more than urban consumers for the same food basket, a 9% increase from the R16,12 price difference reported for October 2010 in the November 2010 Food Price Monitor. In January 2011, rural consumers paid R2,66 more than urban consumers for maize meal (5kg), which is significantly lower than the R6,16 price difference reported in January 2010. A loaf of white bread is the only food item for which rural consumers paid less than urban consumers in January 2011.
- The cost of the food basket, expressed as a share of the average monthly income of the poorest 30% of the population, increased from 33,4% in January 2010 to 33,9% in January 2011. When comparing the costs associated with the typical portion sizes of very poor consumers for the five most widely consumed food items in South Africa, based on January 2011 versus January 2010 prices, there was significant inflation of about 10,4% (from R3,11 to R3,44).
- South Africa's food inflation compared favourably with that of the so-called BRIC countries (Brazil, Russia, India and China). These countries all experienced food inflation of higher than 10%. The overall global food price index increased by 33% from January 2010 to January 2011, reaching its highest level since January 2008.



#### 4.4 Future contract prices and the exchange rate

**Table 6: Closing prices on Friday, 4 March 2011**

	<b>4 March 2011</b>	<b>4 February 2010</b>	<b>% change Mar. vs Feb.</b>
<b>RSA White Maize per ton (May contract)</b>	R1 625	R1 569	+3,57
<b>RSA Yellow Maize per ton (May contract)</b>	R1 672	R1 662	+0,60
<b>RSA Wheat per ton (May contract)</b>	R3 165	R3 380	-6,36
<b>RSA Soya-beans per ton (May contract)</b>	R3 499	R3 828	-8,59
<b>RSA Sunflower seed per ton (May contract)</b>	R4 220	R4 616	-8,58
<b>Exchange rate R/\$</b>	R6,91	R7,26	-4,82

Source: SAFEX

- Mostly maize prices (May 2011 contract) ended higher on 4 March 2011, as compared to the month of February 2010. Local white and yellow maize prices increased by 3,6% and 0,6%, respectively as compared to the previous month. The increase can mainly be attributed to the lower than expected South African maize area and production estimates as well as the drier weather conditions in especially the eastern parts of the country.
- Local wheat, soya-bean and sunflower seed prices showed decreases of 6,4%, 8,6 and 8,6%, respectively, during the same period. A move by China to raise its reserve requirements on banks to curb inflation has weighed heavily on both international and local grain markets, causing a drop in mostly local oilseed prices as China is a major importer of soya-beans.
- For the mentioned period, the Rand appreciated by 4,8% against the US Dollar to reach R 6,91/US\$.
- It is also important to mention that the oil price, in the mean time, surged to more than \$105 a barrel as concern about unrest in the Middle East escalated.

#### 4.5 Agricultural machinery sales

- January tractor sales of 428 units were 8,1% up on the 396 units sold in January 2010. January combine harvester sales of 10 units were significantly up on the 6 units sold in January last year.
- January tractor and combine harvester sales were encouraging, reflecting the current optimism in the agricultural machinery market. It continues to be a buyers' market and with the very recent weakening of the rand, there is some nervousness that prices of imported equipment may soon start increasing. Maize, soya-bean and wheat prices have improved in recent months and this is also contributing to market optimism. Together with improved bank finance, producers are using current market opportunities to invest in new capital equipment.
- Industry predictions for 2011 are that tractor sales will be of the order of 5 000 to 5 200 units, similar to those of 2010.

**Table 7: Agricultural machinery sales**

Equipment class	Year-on-year		Percentage Change %	Year-to-date		Percentage Change %
	January			January		
	2011	2010		2011	2010	
Tractors	428	396	8,08	428	396	8,08
Combine harvesters	10	6	66,67	10	6	66,67

Source: SAAMA press release, February 2011



## 5. Acknowledgements

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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)
- National Agricultural Marketing Council (NAMC)
- South African Agricultural Machinery Association (SAAMA)
- South African Futures Exchange (SAFEX)
- South African National Seed Organisation (SANSOR)
- 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