



Perspektief | Perspective

Nuusbrief Newsletter

06/11/2015 WEEK 45 - 2015

[KLIK HIER VIR DIE AFRIKAANSE WEERGAWE](#)

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DROUGHT STATUS UPDATE

» South Africa's maize is planted on both dryland and irrigation, with 91% of the area dryland and 9% of the area irrigation. Approximately 20% of production is from irrigated areas while 80% is from dryland areas. This is a clear indication of the vulnerability of the country's maize production on the climatic conditions.

If the intent to plant realise, South Africa will have a surplus of white maize, driving prices to export parity, and a shortage of yellow maize which will keep yellow maize prices at import parity. Grain SA wishes to advise that producers take cognisance of this scenario.

THE SUPPLY AND DEMAND FOR MAIZE IN SOUTH AFRICA

Opgedateer / Updated 28-Oct-15	GSA projection 28 Oct	Lower Yields 28 Oct	Average Yields 28 Oct	Above Average 28 Oct
Bemarkingsjaar/ Marketing Year	2015/16**	2016/17**	2016/17**	2016/17**
Oppervlak aangeplant/Area planted (x1 000 ha)	2 653	2 551	2 551	2 551
Opbrengs/Yield (ton/ha)	3.75	3.19	4.22	4.53
NOK produksie skatting/CEC crop estimate ('000ton)	9 942	8 146	10 768	12 026
Terughoudings / Retentions	500	500	500	500
Minus: vroeë leverings / Early Deliveries (Current season)				
Plus: vroeë leverings / Early Deliveries (Next season)				
Beskikbaar vir kommersiële leverings / Available for Commercial Deliveries	9 442	7 646	10 268	11 526
	Graan SA	Graan SA	Graan SA	Graan SA
	('000 ton)	('000 ton)	('000 ton)	('000 ton)
Kommersiële aanbod / Commercial supply				
Beginvoorraad (1 Mei) / Opening stocks (1 May)	2 074	1 466	1 466	1 466
Kommersiële leverings / Commercial deliveries	9 420	7 624	10 246	11 504
Surplus				
Invoere /Imports	770	2 406	500	
Totaal kommersiële aanbod /Total commercial supply	12 264	11 496	12 211	12 970
Kommersiële vraag / Commercial demand				
Kommersiële verbruik / Commercial consumption				
Voedsel / Food	4 620	4 620	4 620	4 620
Voer / Feed	5 000	5 196	5 096	5 090
Totaal / Total	9 620	9 816	9 716	9 710
Ander verbruik / Other consumption				
Omruilmaal / Gristing	47	47	47	47
Onttrek deur produsente / Withdrawn by producers	105	105	105	105
Vry gestel aan eindverbruikers / Released to end consumers	185	185	185	185
Net Receipts	31	31	31	31
Deficit				
Totaal / Total	368	368	368	368
Totaal RSA verbruik (kommersiële) / Total RSA consumption (commercial)	9 988	10 184	10 084	10 078
Uitvoere / Exports				
Produkte / Products	180	180	180	180
Heelmielies / Whole maize	630	630	760	1 560
Totaal / Total	810	810	940	1 740
Totaal kommersiële vraag / Total commercial demand	10 798	10 994	11 024	11 818
Eindvoorraad (30 April) / Carry-out (30 April)	1 466	502	1 187	1 152
Benodigde pyplyn / Pipeline requirements (1.5 months)	1 203	1 227	1 215	1 214
Surplus bo pyplyn / Surplus above pipeline	263	-725	-27	-62
Eindvoorraade as % van RSA verbruik/ Carry-out as a % of RSA consumption	14.67%	4.92%	11.78%	11.43%
Eindvoorraade as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	13.57%	4.56%	10.77%	9.75%

** Grain SA projection

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AGRICULTURAL PRODUCTION CONDITIONS

Petru Fourie, Research Coordinator & Production Cost Analyst, Grain SA

AGRICULTURAL PRODUCTION CONDITIONS

As on 4 November 2015

General

- It is very dry in all the grain and oilseed productions regions. Subsoil moisture conditions are depleted and rain is desperately needed.

North West

- Summer crop plantings will commence from mid-Nov.
- Subsoil moisture conditions are abnormally dry, which means that above average rainfall is needed before producers will start planting (to avoid risk).
- Maize plantings have started here and there on a small scale on the water table.

North West Free State

- The biggest % maize crop planting occurs mainly between mid-Nov to mid-Dec.
- To date, $\pm 2\%$ of maize hectares planted and wind damage have occurred.
- Subsoil moisture conditions are exceptionally dry and rain is needed urgently.

Eastern Free State

- VKB service area: Maize are planted mainly from beginning Oct to mid-Nov.
- There is concern as only $\pm 5\%$ of the maize has been planted and the end of the planting season is approaching.
- Frost occurred on the planted seedlings.
- Almost no sunflower and soybeans have been planted to date.
- VKB service area: Maize is largely planted up until end-Nov although some areas can extend to mid-Dec.
- Only some soybeans have been planted thus far; producers have halted their activities in anticipation of rain.

Limpopo

- Dryland maize crop plantings:
 - Only start towards December
 - Conditions are very dry
- Commercial maize and soybean planting under irrigation:
 - Maize have grown generally to between knee- and hip height and appear good.
 - Producers have completed planting by $\pm 55\%$ but have halted due to concerns over water availability.
 - Soybean plantings start in December only.

Mpumalanga

- Maize planting generally start from early Oct to mid-Nov.
- Estimates are that slightly more than 50% of the maize has already been planted.
- Conditions are drying which could impact the completion on the planting process.

KwaZulu-Natal

- Planting of dryland maize crops generally take place from mid-Oct to mid-Nov place.
- To date, very little has been planted - conditions are very dry and rain is critically needed.
- Producers are standing still waiting, hoping for rain.
- A small % of irrigation maize has been planted.



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SOUTH AFRICAN BREAD PRICES

» South Africa's average price of bread is lower than most other countries according to the International Grain Council's World Grain Statistics 2014. We are 17th on the list of 69 countries, whilst keeping in mind that some countries higher up on the list have state subsidised bread prices.

AVERAGE PRICES OF BREAD

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SELECTED COUNTRIES

COUNTRY	As at	Type of bread	Weight (grams)	AVERAGE PRICES		US cents per kilogram	
				In national currency	In US cents		
Tunisia	2014	Bread	400.00	Tunisian dinar	0.23	13.58	33.95
Ukraine	Dec 2011	White bread	1000.00	Hryvnia	3.78	46.96	46.96
Afghanistan	2014	Bread	1000.00	Afghani	38.48	67.19	67.19
Azerbaijan	2014	High quality bread	1000.00	Manat	0.80	76.54	76.54
Kyrgyzstan	2014	Bread	1000.00	Soma	42.76	80.46	80.46
Botswana	2012	Standard loaf	700.00	Pula	7.09	61.64	88.05
Georgia	2014	Bread	1000.00	Lari	1.56	88.34	88.34
Mauritius	2013	Baguette	200.00	Mauritian rupee	5.60	18.89	94.43
Bulgaria	2013	White bread	1000.00	Euro	0.72	95.62	95.62
Armenia	2014	High quality bread	1000.00	Dram	396.91	95.65	95.65
Swaziland	2014	White bread	800.00	Lilangeni	8.50	78.45	98.06
Serbia	2014	White bread	1000.00	Dinar	86.99	98.82	98.82
Bolivia	2014	Bread	60.00	Boliviano	0.41	6.06	100.98
Macedonia	Dec 2014	Standard white bread	450.00	Denar	22.55	45.48	101.06
Sri Lanka	Dec 2014	Bread	450.00	Sri Lanka rupee	60.00	45.78	101.73
Czech Republic	Dec 2014	Caraway seed bread	1000.00	Czech koruna	23.04	102.78	102.78
South Africa	2014	White bread	800.00	South African r	9.52	87.86	109.83
Lebanon	2014	Bread	900.00	Lebanese pound	1500.00	100.61	111.79
Hungary	2014	White bread	1000.00	Hungarian forint	271.00	116.60	116.60
Russia	2014	High quality bread	1000.00	Rouble	45.59	118.44	118.44
Poland	2014	Wheat-rye bread	1000.00	Zloty	3.92	124.41	124.41
Zimbabwe	2014	Bread	720.00	US dollar	0.95	95.00	131.94
Romania	2013	White bread	1000.00	Euro	1.00	132.80	132.80
New Zealand	Dec 2014	Standard white bread	600.00	New Zealand dollar	1.08	83.82	139.70
Montenegro	2014	White bread	600.00	Euro	0.65	86.00	143.33
Tanzania	2013	Bread	500.00	Tanzania shilling	1150.00	72.60	145.20
Turkey	2014	Bread	1000.00	New Turkish lira	3.20	146.48	146.48
Mexico	Dec 2014	Pan blanco	70.00	Mexican peso	1.50	10.34	147.65
Netherlands	2014	Bread	1000.00	Euro	1.20	159.26	159.26
Belarus	2014	High grade bread	1000.00	Belarussian ruble	16 466.33	161.30	161.30
Chile	2014	Bread	1000.00	Chilean peso	986.79	173.12	173.12
Uganda	Dec 2011	Bread	500.00	Shilling	2 184.88	86.61	173.21
Senegal	2013	Baguette	200.00	Franc	173.00	35.01	175.06
Slovakia	2014	Bread	1000.00	Euro	1.33	176.51	176.51
Nicaragua	Nov 2014	Pan	453.59	Cordoba oro	21.16	80.73	177.98
Malta	2014	Standard loaf	600.00	Euro	0.81	107.50	179.16
Lithuania	2014	Rye bread	1000.00	Euro	1.48	196.42	196.42
Panama	2014	Bread	453.59	Balboa	0.93	93.00	205.03
Ireland	2014	White sliced (large)	800.00	Euro	1.29	171.73	214.66
Latvia	2014	White bread	1000.00	Euro	1.66	220.31	220.31
Cyprus	Dec 2014	Standard loaf	1000.00	Euro	1.82	224.25	224.25
Slovenia	2014	White bread	1000.00	Euro	1.73	229.93	229.93
Peru	2014	French bread	1000.00	Nuevo sol	6.50	232.48	232.48
Philippines	2014	American bread (Gardenia)	600.00	Philippine peso	62.00	139.91	233.19
Israel	Dec 2014	Standard bread (sliced)	750.00	New Israeli shekel	6.92	176.17	234.89
Estonia	2014	Bread	1000.00	Euro	1.82	241.54	241.54
United Kingdom	2014	Large wholemeal loaf (sliced)	800.00	Sterling-pound	1.19	196.67	245.84
Greece	Dec 2013	Standard loaf	1000.00	Euro	1.96	268.49	268.49
United States	2014	Pan white	453.59	US dollar	1.40	140.10	308.87
Singapore	2014	White bread	400.00	Singapore dollar	1.57	123.95	309.88
Guatemala	2014	French bread	460.00	Quetzal	11.17	147.01	316.60
Belgium	2014	White bread	800.00	Euro	2.03	269.41	336.76
Bosnia & Herzegovina	Dec 2012	Wheat bread	1000.00	Convertible mark	2.25	337.62	337.62
Canada	Dec 2014	Bread	675.00	Canadian dollar	2.84	246.19	364.72
Spain	2013	White bread	1000.00	Euro	2.79	370.52	370.52
Iceland	Nov 2014	White bread	1000.00	Icelandic kronur	460.00	373.32	373.32
Italy	2014	Bread	1000.00	Euro	2.87	380.89	380.89
Japan	2014	White bread	1000.00	Japanese yen	409.00	385.49	385.49
Brazil	2014	French bread	1000.00	Real	9.07	386.37	386.37
Switzerland	2011	White bread	500.00	Swiss franc	1.79	195.54	391.09
Austria	2013	Wheat and rye bread	1000.00	Euro	2.95	391.77	391.77
France	Dec 2014	Baguette	1000.00	Euro	3.48	428.78	428.78
Sweden	2014	Rye bread	550.00	Kroner	16.32	237.95	432.63
Uruguay	Aug 2013	Bread	215.00	Peso	22.88	107.98	502.21
Australia	Jun 2011	White sliced	700.00	Australian dollar	3.51	362.23	517.47

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SYNGENTA GRAIN ACADEMY APPLICATIONS OPEN



Grain Academy
Challenge | Conversation | Change | Courage



» Applications for the 2016 Syngenta Grain Academy has opened and can be submitted until 8 January 2016. Syngenta has, in partnership with the University of the Free State's Business School, developed a tailored leadership development programme for young commercial producers, which has been successfully implemented from 2013 to equip them to address the challenges of tomorrow.

Visit the link below for more information

<http://www.grainsa.co.za/upload/Grain-Academy-2016-Information-Eng..pdf>

Download the 2016 application form here

<http://www.grainsa.co.za/upload/Grain-Academy-2016-Application.pdf>

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NEW ERA COMMERCIAL FARMER RECEIVES HIS PRIZE

» As if still dreaming, Solomon Masango, the 2015 Grain SA/ABSA/John Deere Financial New Era Commercial Farmer of the Year looked on in ecstasy as his brand new John Deere 5403 MFWD tractor sponsored by John Deere Financial in partnership with ABSA, was delivered to his farm on Friday. Gathering around Solomon, his wife Christina and the workers once again expressed their appreciation for the work Grain SA is doing in their Farmer Development Programme and through the study groups. Solomon further thanked John Deere Financial and ABSA and vowed to continue working and growing his farming operation. Delivering the tractor, AFGRI Middelburg gave Solomon an overview of the tractor's capabilities and provided the necessary training in order for him to get the most out of this wonderful prize.



Solomon receiving training from Johan Botha, Whole Goods Marketer, AFGRI Middelburg and posing with his wife Christina, together with Alwyn Small (left), Manager: Credit Sales & Marketing, John Deere Financial and Jacques van den Berg (right), Branch Manager: AFGRI Middelburg.

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Stay inspired...

"Leadership is action, not position"

~ Donald H. McGannon

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