

## Grain SA : S&D Projections / Wintergrain

Opgedateer / Updated  
29-Jul-24

GSA's projections for the 2024/25 marketing season are based on the CEC's 'preliminary planted area for wintergrains



**Disclaimer:** *Everything has been done to ensure the accuracy of this information, however Grain SA takes no responsibility for any losses or damage occurred due to the usage of this information.*

**DIE VRAAG-EN-AANBOD VAN KORING IN DIE RSA  
THE SUPPLY AND DEMAND FOR WHEAT IN SOUTH AFRICA**

Opdateer \ Updated	GSA Projection	Scenario 1	Scenario 2	Scenario 3
29-Jul-24	Final CEC Estimate	Low yield	Average yield	High yield
Bemarkingsjaar / Marketing Year	2023/2024*	2024/2025*	2024/2025*	2024/2025*
<i>Oppervlak aangeplant/Area planted (x1 000 ha)</i>	538	502	502	502
<i>Opbrengs/Yield (ton/ha)</i>	3,9	3,3	3,8	4,0
<i>NOK produksie skatting/CEC crop estimate ('000ton)</i>	2078	1632	1908	2008
<i>Terughoudings en saadproduksie / Retentions and production of seed</i>	45	10	10	10
<i>Beskikbaar vir kommersiële lewerings / Available for commercial deliveries</i>	2033	1622	1898	1998
	Grain SA	Grain SA	Grain SA	Grain SA
<b>Kommersiële aanbod / Commercial supply</b>				
<i>Beginvoorraad (1 Oktober) / Opening stocks (1 October)</i>	563	569	569	569
<i>Kommersiële produksie / Commercial production</i>	2033	1622	1898	1998
<i>Surplus (Adjustment of the reconciliation)</i>	7	7	7	7
<i>Invoere / Imports</i>	1700	1951	1672	1572
<b>Totale kommersiële aanbod / Total commercial supply</b>	<b>4303</b>	<b>4149</b>	<b>4146</b>	<b>4146</b>
<b>Kommersiële vraag / Commercial demand</b>				
<i>Voedsel / Food</i>	3455	3507	3507	3507
<i>Voer / Feed</i>	6	19	19	19
<b>Totaal / Total</b>	<b>3461</b>	<b>3526</b>	<b>3526</b>	<b>3526</b>
<i>Totaal Ander verbruik / Total Other use</i>	30	27	25	25
<b>Totaal RSA verbruik / Total RSA consumption</b>	<b>3491</b>	<b>3553</b>	<b>3551</b>	<b>3551</b>
<i>Uitvoere / Exports</i>				
<i>Produkte / Products</i>	32	30	30	30
<i>Heelkoring / Whole wheat</i>	211	182	182	182
<b>Totaal / Total</b>	<b>243</b>	<b>212</b>	<b>212</b>	<b>212</b>
<b>Totale vraag / Total demand</b>	<b>3734</b>	<b>3766</b>	<b>3763</b>	<b>3763</b>
<b>Eindvoorraad (30 September) / Carry-out (30 September)</b>	<b>569</b>	<b>383</b>	<b>383</b>	<b>383</b>
<i>Benodigde pyplyn / Pipeline requirements</i>	426	432	432	432
<b>Surplus bo pyplyn/ Surplus above pipeline</b>	<b>144</b>	<b>-49</b>	<b>-50</b>	<b>-49</b>
<b>% invoere t.o.v RSA verbruik/ % imported of RSA consumption</b>	<b>48,7%</b>	<b>54,9%</b>	<b>47,1%</b>	<b>44,3%</b>
<b>Eindvoorrade as % van RSA verbruik/ Carry-out as a % of RSA consumption</b>	<b>16,3%</b>	<b>10,8%</b>	<b>10,8%</b>	<b>10,8%</b>
<b>Eindvoorrade as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand</b>	<b>15,3%</b>	<b>10,2%</b>	<b>10,2%</b>	<b>10,2%</b>

\*projection for new marketing year

**For Projections:**

**Average yield:** 10 Year Average

**Low Yield:** Lowest figure in the past 10 years

**High Yield:** Highest figure in the last 10 years

**Imports:** Balancing figure

**Exports:** 5 Year average

**Rest of the figures:** 3 Year average

**For Projections:**

**Hectares:** CEC intentions

**Average yield:** 5 Year Average

**Low Yield:** Lowest 5 yields

**High Yield:** Highest 5 yields

**Imports:** Balancing figure

**Exports:** 5 Year average

**Human consumption:** 1,5'

**Animal feed:** 5 Year average

**Rest of the figures:** 5 Year average

DIE VRAAG-EN-AANBOD VAN GARS IN DIE RSA THE SUPPLY AND DEMAND FOR BARLEY IN SOUTH AFRICA 29-Jul-24	GSA Projection	Scenario 1	Scenario 2	Scenario 3
	Final CEC Estimate	Low yield	Average yield	High yield
Bemarkingsjaar / Marketing Year	2023/2024*	2024/2025*	2024/2025*	2024/2025*
Oppervlak aangeplant/Area planted (ha)	107600	102 050	102 050	102 050
Opbrengs/Yield (ton/ha)	3,5	3,3	3,4	3,9
NOK produksie skatting/CEC crop estimate (ton)	376 195	338 806	346 970	394 934
Beskikbaar vir kommersiële lewerings / Available for commercial deliveries	376 195	338 806	346 970	394 934
	<b>Grain SA</b>	<b>Grain SA</b>	<b>Grain SA</b>	<b>Grain SA</b>
<b>Kommersiële aanbod / Commercial supply</b>				
Beginvoorraad (1 Oktober) / Opening stocks (1 October)	149 928	198 012	198 012	198 012
Kommersiële produksie / Commercial production	376 195	338 806	346 970	394 934
Invoere / Imports	146 023	33 367	33 367	33 367
<b>Totale kommersiële aanbod / Total commercial supply</b>	<b>672 146</b>	<b>570 185</b>	<b>578 349</b>	<b>626 313</b>
<b>Kommersiële vraag / Commercial demand</b>				
Menslik / Human	316 523	310 193	310 193	310 193
Voer / Feed	105 824	102 436	102 436	102 436
Totaal kommersieel / Total commercial consumption	422 347	412 628	412 628	412 628
Totaal Ander verbruik / Total Other use	12 960	16 320	16 320	16 320
Totaal RSA verbruik / Total RSA consumption	435 307	428 948	428 948	428 948
Uitvoere / Exports				
Heelgars / Whole barley	8 152	8 152	8 152	8 152
Produkte/Products	30 675	30 675	30 675	30 675
Totaal / Total	38 827	105 158	113 318	161 258
<b>Totale vraag / Total demand</b>	<b>474 134</b>	<b>534 106</b>	<b>542 266</b>	<b>590 206</b>
<b>Eindvoorraad (30 September) / Carry-out (30 September)</b>	<b>198 012</b>	<b>36 080</b>	<b>36 084</b>	<b>36 107</b>
Benodigde pyplyn / Pipeline requirements	52 070	50 872	50 872	50 872
<b>Surplus bo pyplyn/ Surplus above pipeline</b>	<b>145 942</b>	<b>-14 792</b>	<b>-14 788</b>	<b>-14 765</b>
% invoere t.o.v RSA verbruik/ % imported of RSA consumption	34%	8%	8%	8%
Eindvoorrade as % van RSA verbruik/ Carry-out as a % of RSA consumption	45%	8%	8%	8%
Eindvoorrade as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	42%	7%	7%	6%

**For Projections:**

**Hectares:** CEC intentions

**Average yield:** 5 Year Average

**Low Yield:** Lowest 5 yields in the past 10 years.

**High Yield:** Lowest 5 yields in the past 10 years.

**Imports:** Balancing figure

**Exports:** Previous season figure

**Human consumption:** -2% growth

**Animal feed:** 5 Year average

<b>DIE VRAAG-EN-AANBOD VAN HAWER IN DIE RSA/ THE SUPPLY AND DEMAND FOR OATS IN SOUTH AFRICA</b>				
Opdateer \ Updated	<b>GSA Projection</b>	<b>Scenario 1</b>	<b>Scenario 2</b>	<b>Scenario 3</b>
29-Jul-24	<b>Final CEC Estimate</b>	<b>Low yield</b>	<b>Average yield</b>	<b>High yield</b>
<b>Bemarkingsjaar / Marketing Year</b>	<b>2023/2024*</b>	<b>2024/2025*</b>	<b>2024/2025*</b>	<b>2024/2025*</b>
<i>Area aangeplant / Area planted</i>	27 500	28 400	28 400	28 400
<i>Opbrengs / Yield (ton/ha)</i>	1,464	1,2	1,4	3,4
<i>NOK produksie skatting / CEC crop estimate (ton)</i>	40 250	33 228	38 908	95 708
<i>Beskikbaar vir kommersiële lewerings / Available for commercial deliveries</i>	40 250	33 228	38 908	95 708
	<b>Grain SA</b>	<b>Grain SA</b>	<b>Grain SA</b>	<b>Grain SA</b>
<b>Komersiële aanbod / Commercial supply *</b>				
Beginvoorraad (1 Oktober) / Opening stocks (1 October)	23 401	36 916	36 916	36 916
Komersiële produksie / Commercial production	40 250	33 228	38 908	95 708
Invoere / Imports	42 620	58 156	54 056	13 056
<b>Totale kommersiële aanbod / Total commercial supply</b>	<b>106 271</b>	<b>128 301</b>	<b>129 881</b>	<b>145 681</b>
<b>Komersiële vraag / Commercial demand</b>				
Voedsel / Food	51 200	51 712	51 712	51 712
Voer / Feed	12 016	12 497	12 497	12 497
Totaal kommersieel / Total commercial consumption	63 216	64 209	64 209	64 209
Totaal RSA verbruik / Total RSA consumption	69 266	70 982	70 982	70 982
Uitvoere / Exports	89	123	123	123
<b>Totale vraag / Total demand</b>	<b>69 355</b>	<b>71 105</b>	<b>71 105</b>	<b>71 105</b>
<b>Eindvoorraad (30 September) / Carry-out (30 September)</b>	<b>36 916</b>	<b>57 196</b>	<b>58 776</b>	<b>74 576</b>
Benodigde pyplyn / Pipeline requirements	7 794	7 916	7 916	7 916
<b>Surplus bo pyplyn/ Surplus above pipeline</b>	<b>29 123</b>	<b>49 280</b>	<b>50 860</b>	<b>66 660</b>
% invoere t.o.v RSA verbruik/ % imported of RSA consumption	62%	82%	76%	18%
Eindvoorraad as % van RSA verbruik/ Carry-out as a % of RSA consumption	53%	81%	83%	105%
Eindvoorraad as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	53%	80%	83%	105%

**For Projections:**

**Hectares:** CEC intentions

**Average yield:** 5 Year Average

**Low Yield:** Lowest 5 yields in the past 10 y

**High Yield:** Lowest 5 yields in the past 10 y

**Imports:** Balancing figure

**Exports:** Previous season figure

**Human consumption:** 0,1% growth

**Animal feed:** 4% increase