



Wheat Forum

26 October 2023

Bernard Schultz
General Manager

Production, Retention & Deliveries



Crop Estimate vs. SAGIS Producer Deliveries

Wheat: RSA Productions vs Deliveries

	2020/21 Oct - Sep	2021/22 Oct - Sep	2022/23 Progr. Oct - Sep
	Ton		
CEC Production	2 120 000	2 285 000	2 110 000
Less Retentions	41 000	40 000	50 000
Total available	2 079 000	2 245 000	2 060 000
SAGIS Deliveries	2 077 136	2 262 938	2 059 649
Difference	1 864	-17 938	351

Weekly Progr.

2023/24 Oct '23
Ton
2 131 375
45 000
2 086 375
23 819
2 062 556

* 2023/24: 2nd forecast

Source: SAGIS, CEC, S&DEC

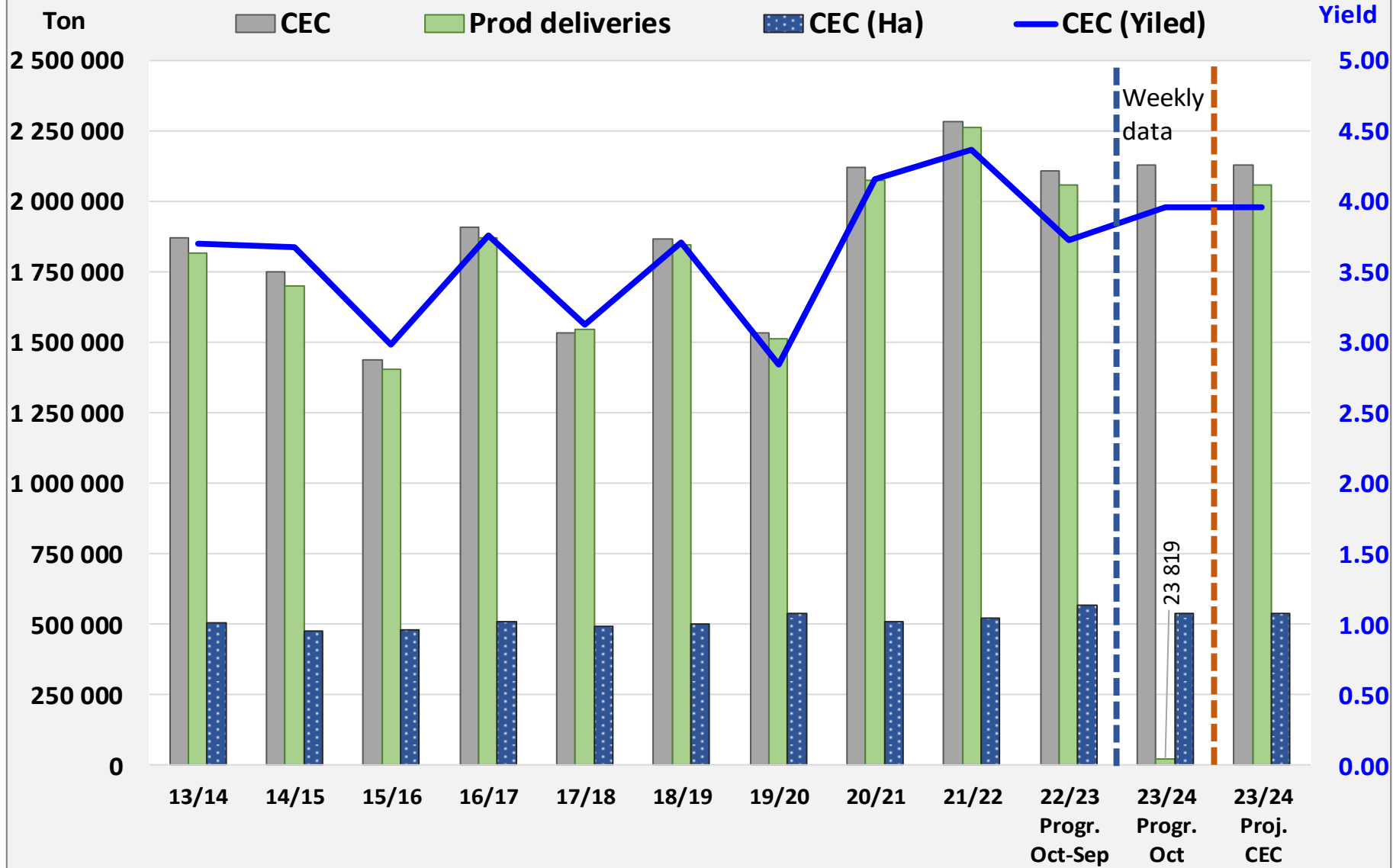
Week Ending:

06/10 - 20/10/2023

CEC Estimate, Yield, Ha & SAGIS Deliveries

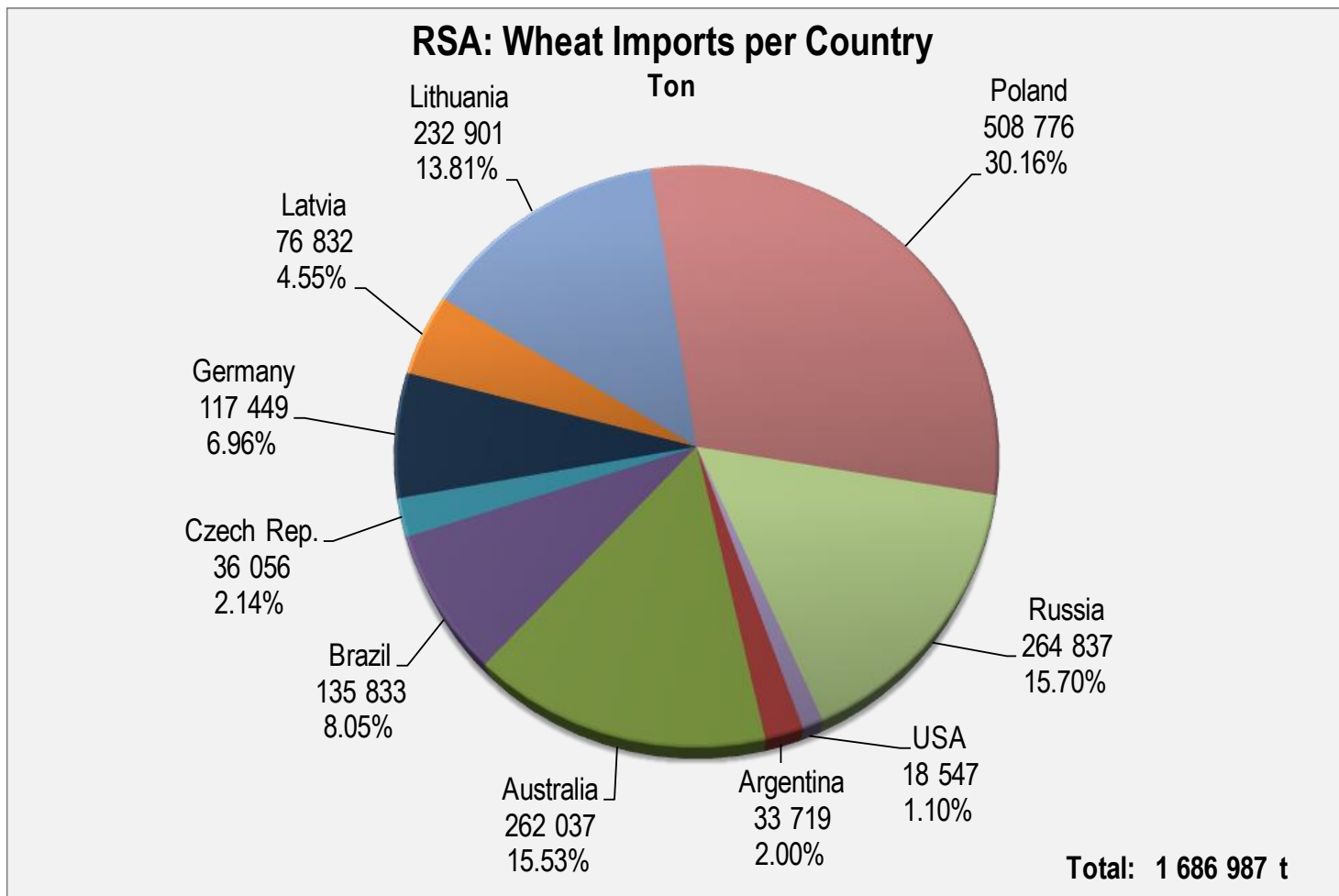


Wheat: CEC Estimates vs. SAGIS Deliveries



Imports: Imports per Origin

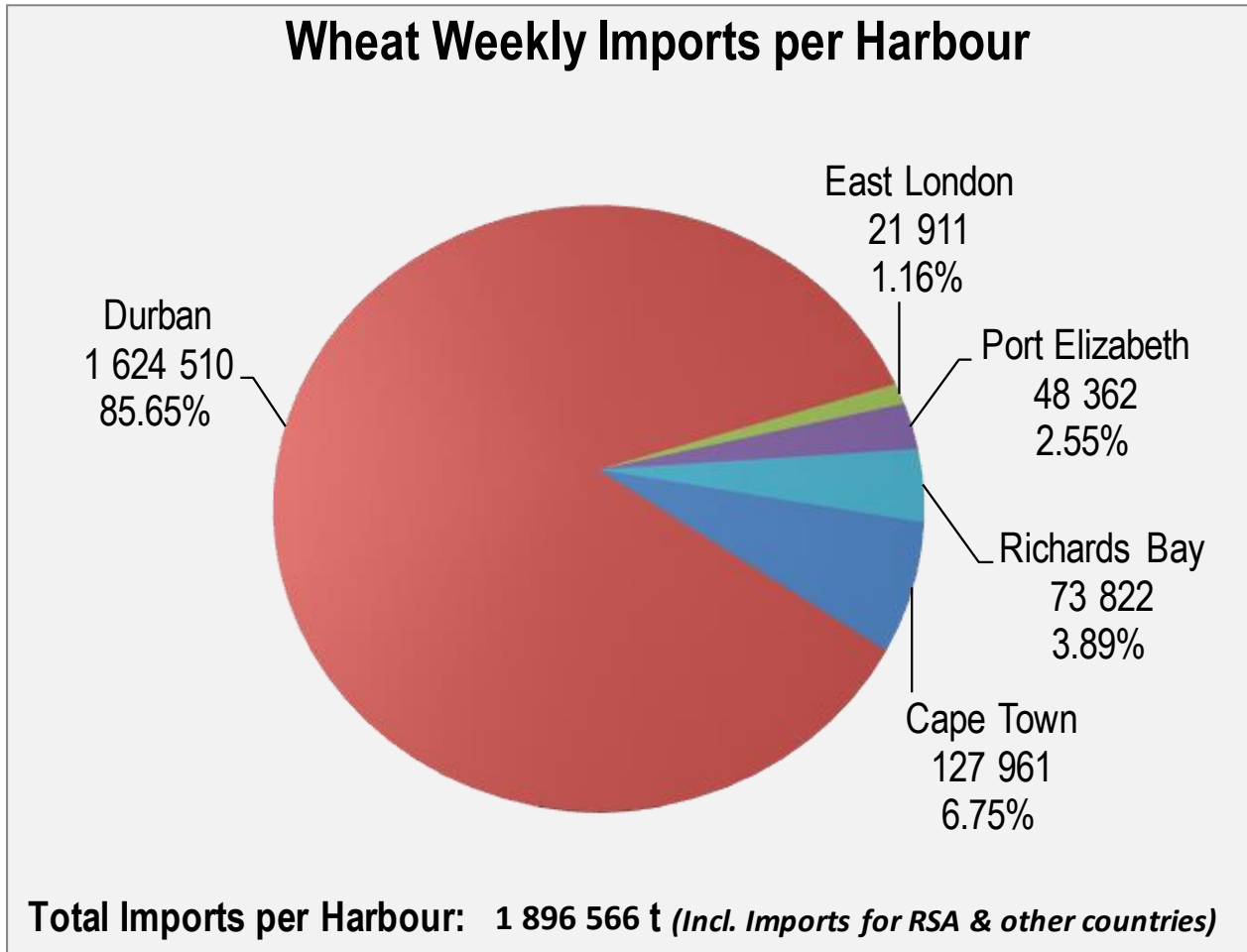
(2022/23: Progr. 1 Oct '22 – 29 Sep '23)



2023/24	Lithuania	Poland	Russia	USA	Total
2023/10/01 - 2023/10/13	12 325	97 571	32 964	10 865	153 725

Imports per Harbour (RSA & Other countries)

(2022/23: Progr. 1 Oct '22 – 29 Sep '23)



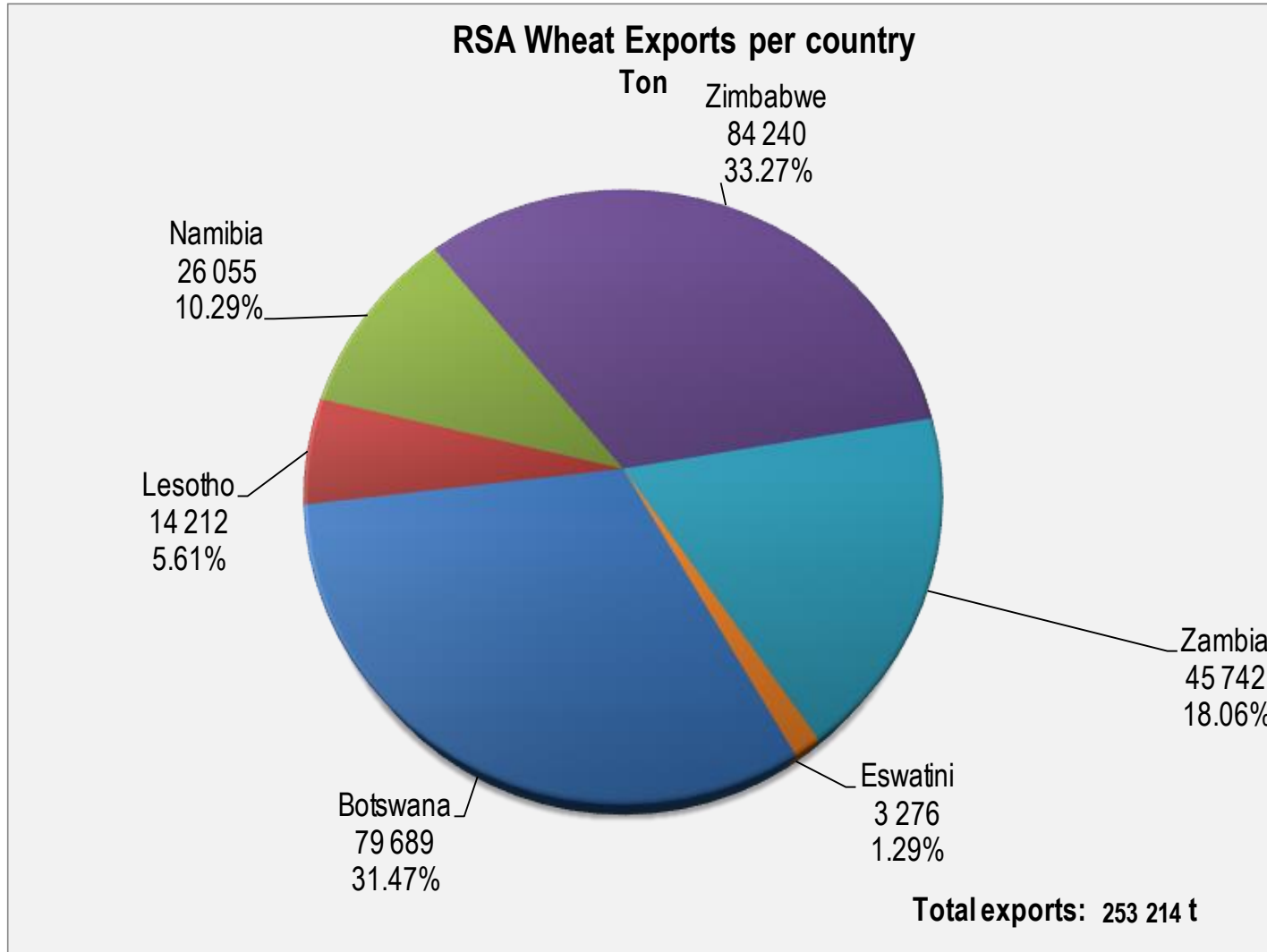
2023/24	Cape Town	Durban	Port Elizabeth	*Total
2023/10/01 - 2023/10/13	37 906	116 336	1 255	155 497

*Includes: Imports for RSA and Other Countries

Wheat Imports

Wheat	Oct '21 - Sep '22 Progr. 12 months		Oct '22 - Sep '23 Progr. 12 months	
Total Imports (RSA + Other)		1 735 076 t		1 904 181 t
Number of Vessels		50		59
Number of Countries		8		11
Number of Ports offloaded		5		5
Harbour facilities visited		130		157
Average per vessel		34 702 t		32 274 t
Largest vessel	Belaja Lithuania	51 701 t	Fermi Australia	50 285 t
Smallest vessel	Imabari Queen Germany	2 732 t	Berge Tatem Canada	5 984 t

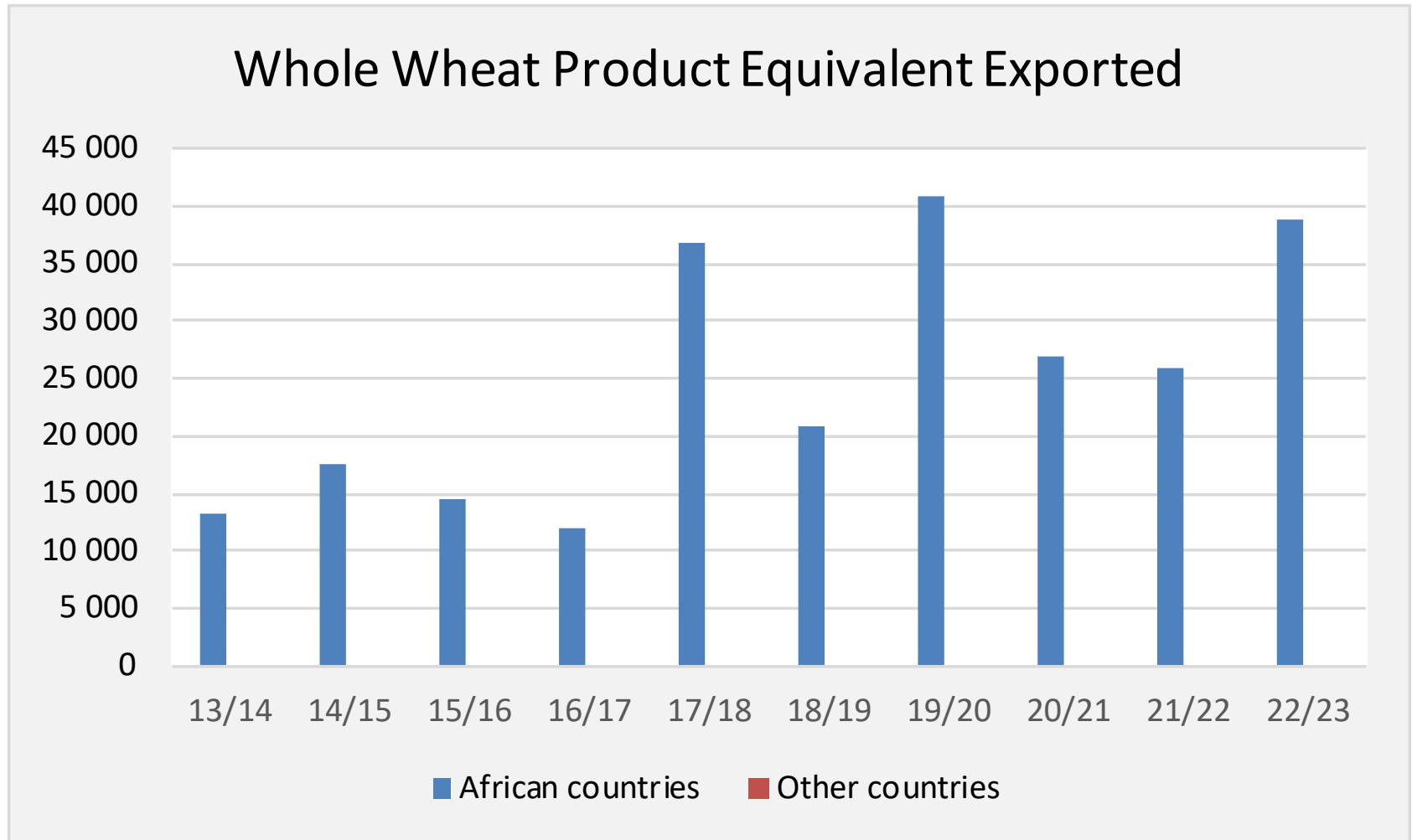
Export destinations (2022/23: Progr. 1 Oct '22 – 29 Sep '23)



2023/24	Lesotho	Namibia	Zimbabwe	Total
2023/10/01 - 2023/10/1	874	833	1 053	2 760

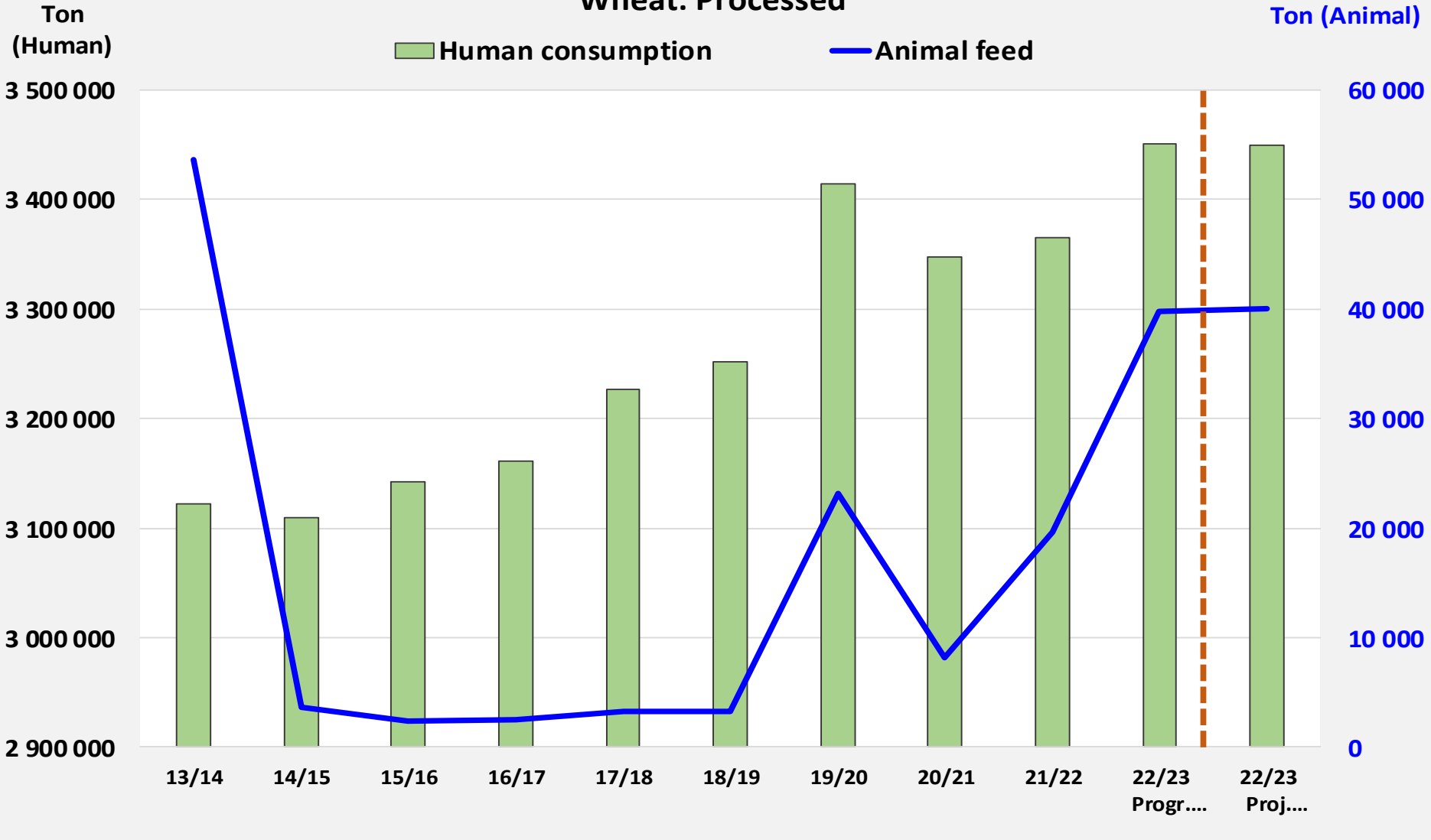
Whole Grain Product Export Equivalent

(2022/23: Progr. 1 Oct '22 – 29 Sep '23)



Consumption

Wheat: Processed





SARS movements

Price movements

SARS FOB prices

(2022/23: Progr. 1 Oct '22 – 31 Aug '23)

Wheat - Other 1001.99		2020/21	2021/22	2022/23 Progr. Oct-Aug
Imports	Quantity (Ton)	1 667 076	1 830 893	1 616 549
Total value of imports	FOB value (R'000)	6 629 214	9 988 133	9 217 623
Value per ton	FOB R/Ton	3 976.55	5 455.33	5 702.04

Source: SARS

Price movements

SARS FOB prices

(2022/23: Progr. 1 Oct 22 – 31 Aug '23)

Wheat - Other 1001.99		2020/21	2021/22	2022/23 Progr. Oct-Aug
Exports	Quantity (Ton)	169 497	328 639	397 296
Total value of exports	FOB value (R'000)	940 171	2 104 223	2 995 825
Value per ton	FOB R/Ton	5 546.81	6 402.84	7 540.54

Source: SARS



Products

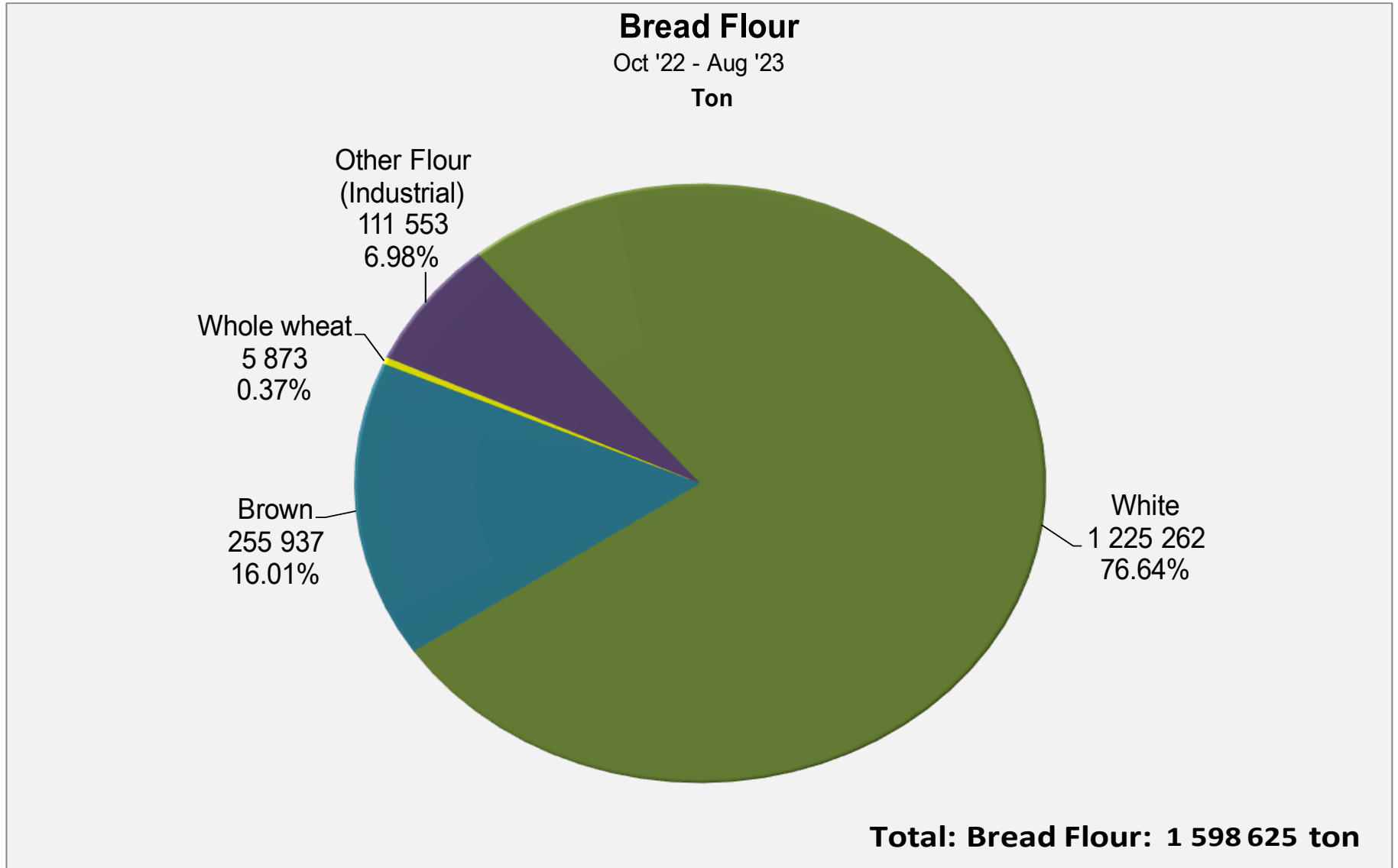
Wheaten Products (Manufactured, Imported & Exported)

(Progr. Oct '22 – Aug '23)

Wheaten Products	Oct '22 - Aug '23 (11 months)					
	Manufactured		Imported		Exported	
	Tons	% of Total	Tons	% of Total	Tons	% of Total
Cake Flour	915 697	28.69	4 565	15.11	2 319	8.22
Self-Raising Flour	14 730	0.46	4	0.01	2 654	9.41
White Bread Flour	1 225 262	38.39	12 135	40.17	9 976	35.36
Brown Bread Flour	255 937	8.02	5 297	17.53	13 040	46.23
Other Flour (Industrial)	111 553	3.50	0	0.00	-	0.00
Whole Wheat Meal	5 873	0.18	0	0.00	11	0.04
Bran	658 340	20.63	8 210	27.18	199	0.71
Semolina	4 151	0.13	0	0.00	10	0.03
Total	3 191 543	100.00	30 211	100.00	28 209	100.00
Whole Wheat Milled	3 198 539	Whole wheat milled = <i>Processed for human consumption</i> <i>Processed for gristing</i> <i>Product exports</i>				
 	 					
		Whole wheat milled = <i>Processed for human consumption</i> <i>Processed for gristing</i> <i>Product exports</i>				
 	 					
 	 					
 	 					
% Bran	21	Whole wheat milled = <i>Processed for human consumption</i> <i>Processed for gristing</i> <i>Product exports</i>				

Wheaten Products : Bread Flour Manufactured (Ton)

(Progr. Oct '22 – Aug '23)



Pan baked bread (Units)

(Progr. Oct '22 – Aug '23)

Pan baked bread manufactured	11 months Oct '22 - Aug '23	% of Total
	Units	
WHITE BREAD		
400g	980 229	0.05
600g	236 919 572	10.78
700g	913 962 742	41.60
Other	9 581 421	0.44
Total White Bread	1 161 443 964	52.87
BROWN BREAD		
400g	1 379 328	0.06
600g	267 302 692	12.17
700g	732 666 218	33.35
Other	14 152 148	0.64
Total Brown Bread	1 015 500 386	46.22
WHOLE WHEAT		
400g	10 975	0.00
600g	458 277	0.02
700g	2 359 605	0.11
Other	16 004 582	0.73
Total Whole Wheat	18 833 439	0.86
OTHER		
400g	15 090	0.00
600g	91 972	0.00
700g	24 666	0.00
Other	985 658	0.04
Total Other	1 117 386	0.05
Total all bread	2 196 895 175	100.00

Price movements

Wheaten products: Year on year price changes

		September				
		2021	% Year on Year	2022	% Year on Year	2023
		Price R		Price R		Price R
White Bread	700g	15.27	22.27	18.67	-1.50	18.39
Brown Bread	700g	13.23	26.15	16.69	1.62	16.96
Cake Flour	2.5kg	29.70	33.60	39.68	7.69	42.73
Bread Flour	2.5kg	34.65	21.82	42.21	10.42	46.61

Source: SAStats

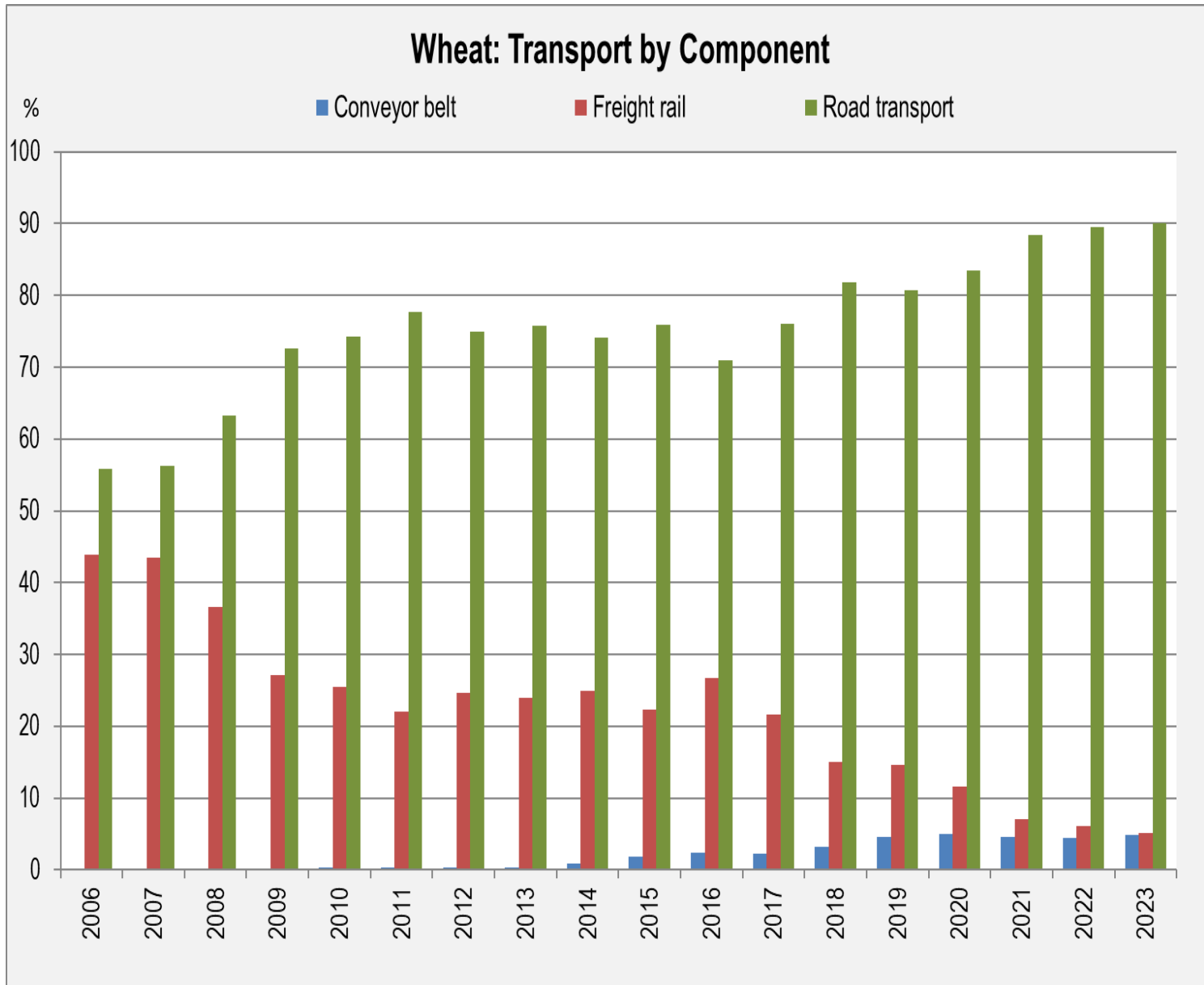




General

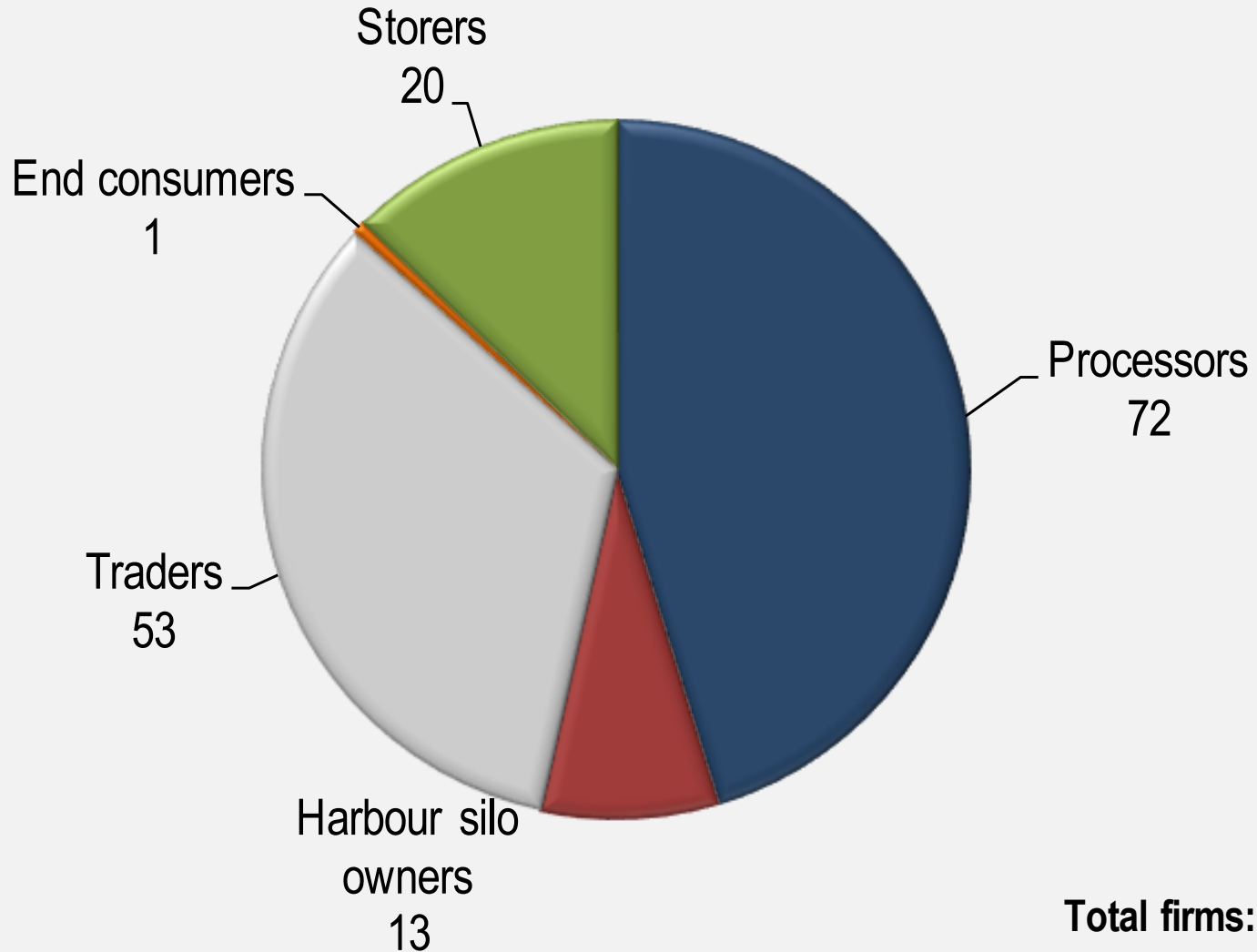
Transport by Component

Wheat



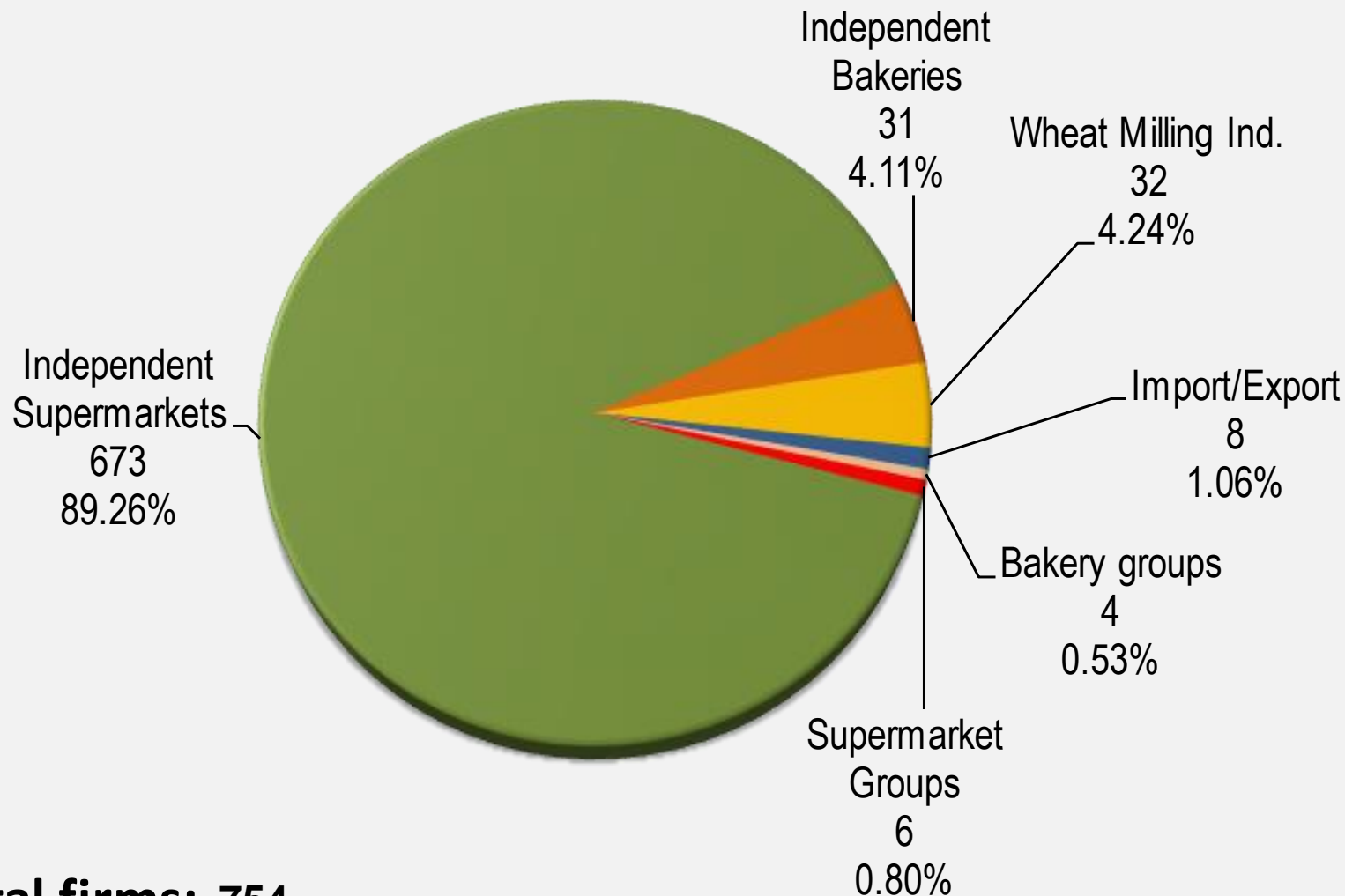
Wheat Co-workers (Whole Grain)

Firm type registered (Whole Grain)



Wheat Co-workers (Products)

Wheat: Firms registered with SAGIS (Products)



Total firms: 754

Acknowledgement

Gratitude

The following parties makes it possible to fulfil SAGIS' commitments:

- SA Winter Cereal Industry Trust
- Wheat Forum
- Relevant Associations
- Board of Directors
- Co-workers
- Staff

Please help: Send any photos of wheat to

admin@sagis.org.za

Note:

The complete presentation is available on the SAGIS website under Presentations



Wheat Intentions

26 October 2023

Bernard Schultz
General Manager

Wheat Intentions

Competition Commission Guidelines

- The volumes of wheat imports and/or exports should be aggregated nationally
- The information of wheat volumes imported and/or exported may be collected and/or disseminated weekly
- The data or volumes of weekly wheat import and/or export must contain information of not less than 5 (five) traders or industry players
- No pricing information be collected or disseminated by SAGIS

Possible Publication Weeks

Wheat imports destined for RSA

January

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

April

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

May

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

June

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

July

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Wheat Intentions

Other Import & Export Items

- **Wheat produced in RSA and exported**
 - Publication was possible for 5 weeks only
 - 2023/04/28
 - 2023/05/12
 - 2023/06/02
 - 2023/06/09
 - 2023/06/16
- **Wheat imported which are destined for other countries**
 - No weeks met the guidelines from the competition commission
- **Exports of Imported wheat**
 - No weeks met the guidelines from the competition commission

Wheat Intentions

Scenarios affecting publication

- Vessels due dates moved forward or delayed due to weather or terminal delays/availability
- Late declaration of intended vessels
- Partial offloading of vessel

Wheat Intentions

Implications of sudden non-publication

- Vessels not realizing will not be reflected in the actual imports, but was part of the last intentions
- There will be no clear explanation how vessels are moved forward, delayed or even washed out between weeks once the final publication took place compared to the actual imports