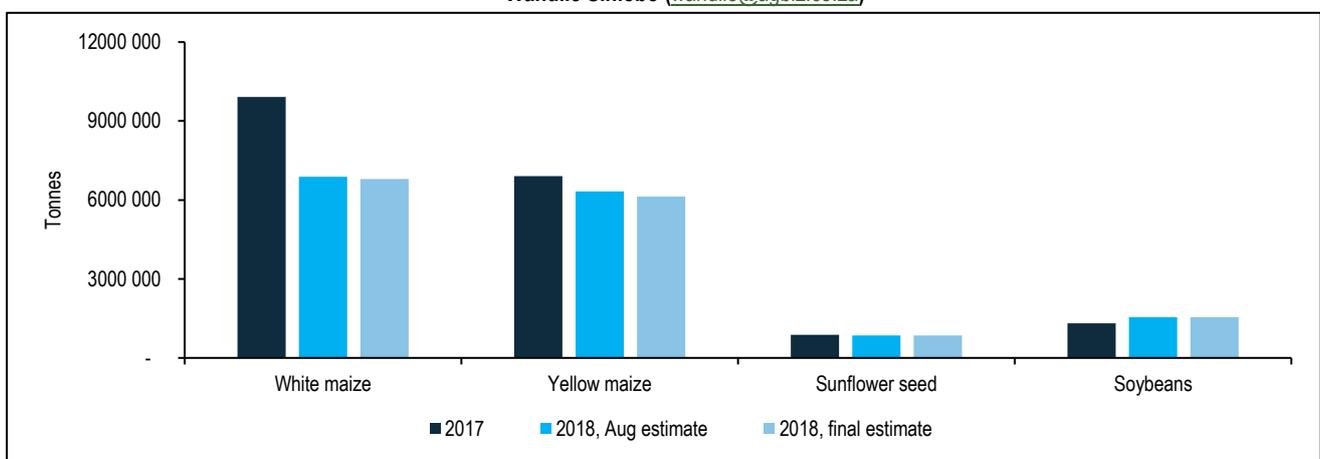


## Maize production estimate revised down, while wheat was lifted from last month

Today the Crop Estimate Committee released its final production estimates for the 2017/18 summer crop and second production estimated for 2018/19 winter crop. In terms of summer crops, the major oilseeds such as soybeans and sunflower seed were left unchanged from the previous month, whilst the commercial maize production estimate was revised down by 2% from the previous estimate to 12.9 million tonnes, which is somewhat in line with our expectations. From a winter crop perspective, the wheat production estimate was revised up by 2% from last month to 1.8 million tonnes – all thanks to good rainfall in parts of the Western Cape and an expansion in area planted in the Free State province.

- Although South Africa's 2017/18 maize production estimate of 12.9 million tonnes is well below the previous season's estimate of 16.8 million tonnes, it is still higher than the long-term average production of 12.0 million tonnes. Most importantly, this is higher than the annual maize consumption of 10.8 million tonnes. Given the foregoing and the carryover stock from the previous season, South Africa's maize supplies for the 2018/19 marketing year which ends in April 2019 are well above 16.0 million tonnes.
- The positive impact of the improvement in weather conditions in the Western Cape province is evident from the recent data, which showed an uptick in wheat yields. Moreover, the expansion in area planted in provinces such as the Free State and North West also contributed positively to the expected improvement in wheat production. This generally implied that South Africa's wheat imports for the 2018/19 marketing year which starts in October 2018 could decline by 33% from the previous season to 1.4 million tonnes. This is good for the country's agricultural trade balance. This is still the second production estimate for the season, the national Crop Estimates Committee will provide further updates over the coming months.

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**Figure 1: South Africa's 2017/18 final summer crop production estimates**

Source: CEC, Agbiz Research

*Disclaimer: Everything has been done to ensure the accuracy of this information, however, AGBIZ takes no responsibility for any loss or damage incurred due to the usage of this information.*