

Global trends in the oilseeds environment

Global oilseed production for 2018/19 is projected at 593,7 million tons, of which 354,5 million tons are from soya beans. Argentina's recovery from the drought is expected to increase their production by 17 million tons to 56 million tons. Production of soya beans in Brazil is expected to remain flat at a level of 117 million tons.

According to the World Agricultural Supply and Demand Estimates (WASDE), protein meal consumption is expected to increase by 4% in 2018/19, while China is expected to import a record 103 million tons of soya beans. Global stocks are expected to decline marginally from last year, to 86,7 million tons.

Oilseed production in SADC

We should take note of the increasing oilseed production in the region as well as interest in increasing this production.

SADC countries currently produce an estimated total of 450 000 tons of soya beans, which is increasing each year. The progress that is likely to occur in countries such as Zimbabwe and Angola regarding oilseed production is important to note. The loss of export markets for pulses to India from many SADC countries should also encourage oilseed production.

We remain firmly of the opinion that we can replace imported oilseed meals, which are mainly from Argentina, with South African production. Major investment in the country's crushing capacity, predominantly in soya bean crushing but also sunflower capacity, allows a total estimated crushing capacity of 2,5 million tons, and a demand for 2 million tons of soya meal (including full fat soya) and 870 000 tons of sunflower meal.

Oilseed demand in South Africa

Total soya bean and sunflower seed demand in a self-sufficient scenario is 2,63 million tons. With a combined sunflower and soya bean production of only 2,2 million tons, we have a long way to go to become self-sufficient.

Canola production has kept up well with the growth in demand and is expected to continue to play an important role in the supply of oil and protein in the Western Cape.

The approximately 70 000 tons of soya bean meal imports from Zambia, at below our cost of production, and the slow pace of some feed companies to make the transition from imported to local soya bean meal, have resulted in this self-sufficiency taking longer than anticipated. It has also led to increased frustration for soya bean producers.

With ongoing broiler trials showing that a high percentage of local soya bean meal to produce broiler results are as good as, if not better than, imported soya bean meal, plus significant discounts in price, this transition will logically take place soon.

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Send us your contributions and suggestions to make *Oilseeds Focus* an enjoyable and valuable publication for the oilseeds industry. Contact Dr Briedenhann at erhardb@netactive.co.za for more information.

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