Required Report: Required - Public Distribution **Date:** April 03, 2025

Report Number: SF2025-0010

Report Name: Oilseeds and Products Annual

Country: South Africa - Republic of

Post: Pretoria

Report Category: Oilseeds and Products

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Report Highlights:

FAS/Pretoria's Oilseeds and Products annual report provides information on the production, supply, and distribution for soybean, sunflowerseed, and rapeseed in South Africa for marketing year (MY) 2023/24, MY 2024/25, and MY 2025/26. Stable local demand for oilseed crushing and anticipated export opportunities should motivate producers to maintain level oilseed area in MY 2025/26. Despite major investments to expand oilseed processing capabilities in recent years, local production has exceeded crushing capacity, increasingly shifting excess oilseeds to export markets. MY 2025/26 consumption for oilseed meals and oils are expected to grow marginally, as South Africa's economic challenges depress demand.

Contents

Executive Summary

- Production Forecasts: FAS/Pretoria forecasts minor growth in oilseed production for South Africa in MY 2025/26[1], on flat area and assuming normal weather conditions and trend yields. Oilseed production should lead to record crush quantity.

- Consumption and Demand: Feed consumption is expected to grow slightly, reflecting suppressed growth in consumer demand for poultry and livestock products, which will limit any major expansion to demand for animal feed. FAS/Pretoria forecasts constrained growth prospects in plant oil consumption due to restricted consumer purchasing power.

- Trade: Oilseed imports are expected to cease as local production exceeds crushing capacity, with exports projected to surge by 36 percent in MY 2025/26. Investments in local oilseed processing capacity have led to record levels of oilseed meal and oil production, reducing reliance on imports in these categories. South Africa will continue to have oilseeds stocks available for exports until new investment in crushing facilities commence.

- Economic challenges: Economic growth is expected to be less than 2 percent annually in 2025 and 2026, with high unemployment rates. Frequent electricity supply shortages, policy uncertainty, and logistical infrastructure challenges hinder economic development.

[1] *The MYs used in the text refers to the USDA marketing years in the Production, Supply and Distribution (PS&D) tables, and do not necessarily correspond with the marketing years used by the South African oilseed industry.*

Oilseeds

Table 1: *Soybean Production, Supply, and Distribution*

Oilseed, Soybean	2023/2024		2024/2025		2025/2026	
Market Year Begins	Mar 2024		Mar 2025		Mar 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	1200	1155	1200	1155	0	1155
Area Harvested (1000 HA)	1150	1150	1155	1151	0	1150
Beginning Stocks (1000 MT)	311	311	241	351	0	356
Production (1000 MT)	1840	1848	2325	2390	0	2470
MY Imports (1000 MT)	190	154	5	0	0	0
Total Supply (1000 MT)	2341	2313	2571	2741	0	2826
MY Exports (1000 MT)	150	150	200	360	0	450
Crush (1000 MT)	1700	1672	1750	1800	0	1800
Food Use Dom. Cons. (1000 MT)	25	22	25	25	0	25
Feed Waste Dom. Cons. (1000 MT)	225	118	290	200	0	200
Total Dom. Cons. (1000 MT)	1950	1812	2065	2025	0	2025
Ending Stocks (1000 MT)	241	351	306	356	0	351
Total Distribution (1000 MT)	2341	2313	2571	2741	0	2826
Yield (MT/HA)	1.6	1.607	2.013	2.0765	0	2.1478
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table 2: *Sunflowerseed Production, Supply, and Distribution*

Oilseed, Sunflowerseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Mar 2024		Mar 2025		Mar 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	530	530	560	556	0	530
Area Harvested (1000 HA)	530	529	560	556	0	530
Beginning Stocks (1000 MT)	99	99	71	44	0	122
Production (1000 MT)	632	632	720	770	0	700
MY Imports (1000 MT)	3	1	15	0	0	0
Total Supply (1000 MT)	734	732	806	814	0	822
MY Exports (1000 MT)	1	0	1	0	0	0
Crush (1000 MT)	650	677	675	680	0	680
Food Use Dom. Cons. (1000 MT)	2	1	2	2	0	2
Feed Waste Dom. Cons. (1000 MT)	10	10	10	10	0	10
Total Dom. Cons. (1000 MT)	662	688	687	692	0	692
Ending Stocks (1000 MT)	71	44	118	122	0	130
Total Distribution (1000 MT)	734	732	806	814	0	822
Yield (MT/HA)	1.1925	1.1947	1.2857	1.3849	0	1.3208
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table 3: *Rapeseed Production, Supply, and Distribution*

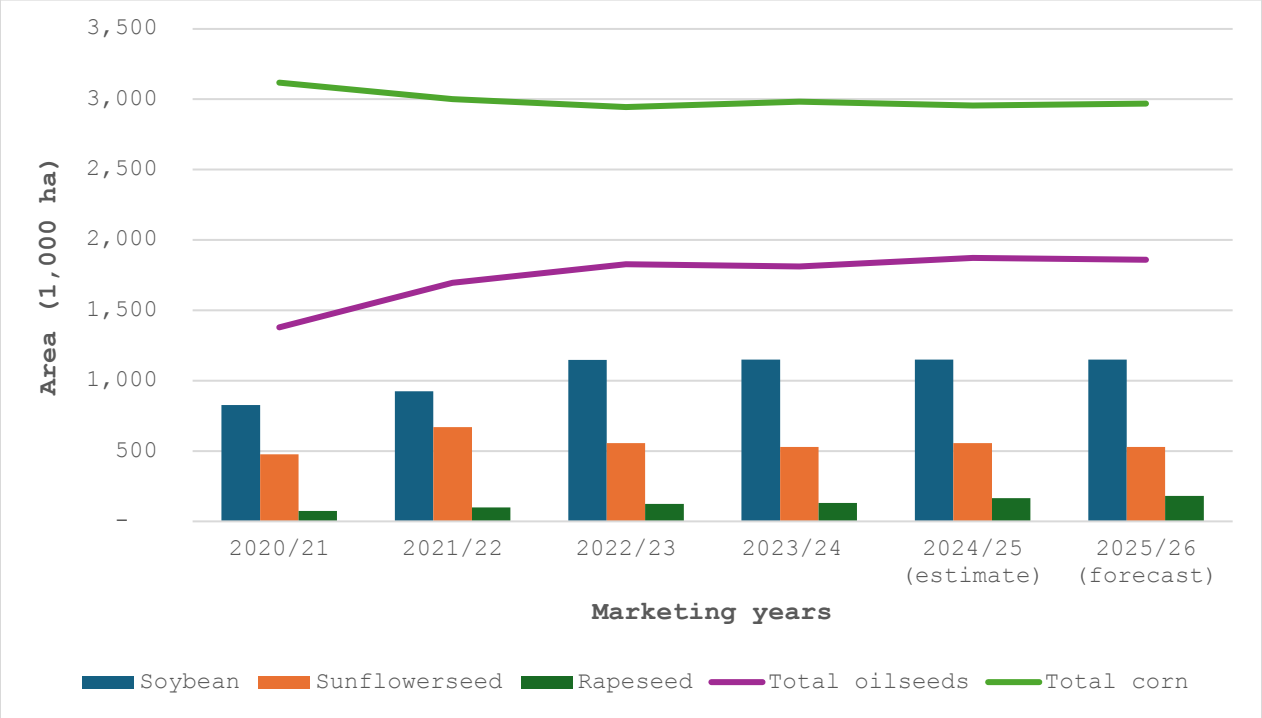
Oilseed, Rapeseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	131	131	165	166	0	180
Area Harvested (1000 HA)	131	131	166	166	0	180
Beginning Stocks (1000 MT)	32	32	31	27	0	35
Production (1000 MT)	236	236	288	288	0	330
MY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	268	268	319	315	0	365
MY Exports (1000 MT)	50	27	90	30	0	80
Crush (1000 MT)	170	206	175	240	0	240
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	17	8	20	10	0	10
Total Dom. Cons. (1000 MT)	187	214	195	250	0	250
Ending Stocks (1000 MT)	31	27	34	35	0	35
Total Distribution (1000 MT)	268	268	319	315	0	365
Yield (MT/HA)	1.8015	1.8015	1.7349	1.7349	0	1.8333
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Area Harvested

FAS/Pretoria forecasts that South Africa's oilseed area will remain flat at 1.9 million hectares (Mha) in MY 2025/26 (March 2026 - February 2027 for soybeans and sunflowerseed and October 2025 – September 2026 for rapeseed). South Africa's oilseed area has remained consistently above 1.8 Mha in recent years, and FAS/Pretoria expects corn area to remain unchanged in MY 2025/26, limiting the availability of land for expansion of oilseed area (see Figure 1). The projected soybean-corn price ratio of about two favors corn, suggesting a relatively higher profit margin for corn production. However, soybeans remain an important rotational crop for producers in the current production environment. Coupled with stable local demand and potential export markets, this should help maintain the soybean planting area.

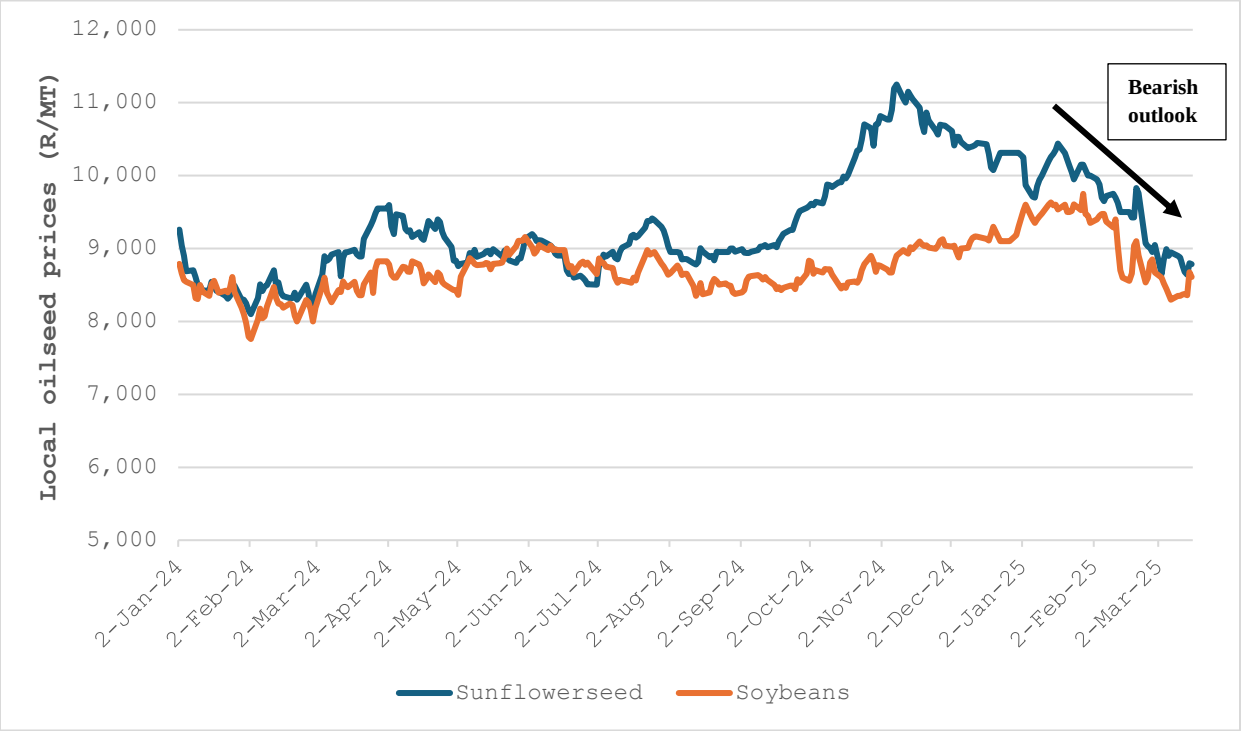
With strong MY 2024/25 (May 2025-April 2026) oilseed production expected, a bearish outlook on local prices is unlikely to trigger any major expansion in planting area later in 2025 for MY 2025/26. Summer rainfall oilseed production in MY 2024/25 is expected to surge by 27 percent to more than 3 million metric tons (MMT), the second largest on record. As of March 2025, local summer crop oilseed prices fell back from relatively high levels three months ago after timely rainfall in February and March boosted production (see Figure 2).

***Figure 1**: Oilseed and Corn area in South Africa*



Source: FAS/Pretoria using data from the South Africa Grain Information Services

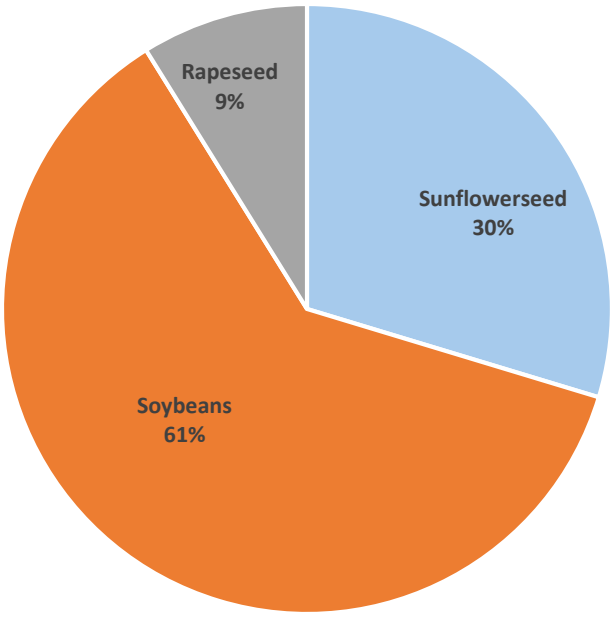
***Figure 2**: Local Oilseed Prices Trends since January 2024*



Source: FAS/Pretoria using data from GrainSA

South Africa's oilseed complex consists mainly of soybean, sunflowerseed, and rapeseed, all grown mainly under rainfed conditions. Soybeans command the largest area with 61 percent of total oilseed plantings (see also Figure 3), followed by sunflowerseed with 30 percent, and rapeseed at 9 percent. Soybean and sunflowerseed are summer rainfall crops and are produced mainly in the northern parts of South Africa, while rapeseed is produced during the winter months. The Western Cape province in the south of South Africa, a winter rainfall region, accounts for most of South Africa's rapeseed production.

Figure 3: *Contributions to South Africa's Total Oilseed Area*



Source: FAS/Pretoria using data from the South Africa Grain Information Services

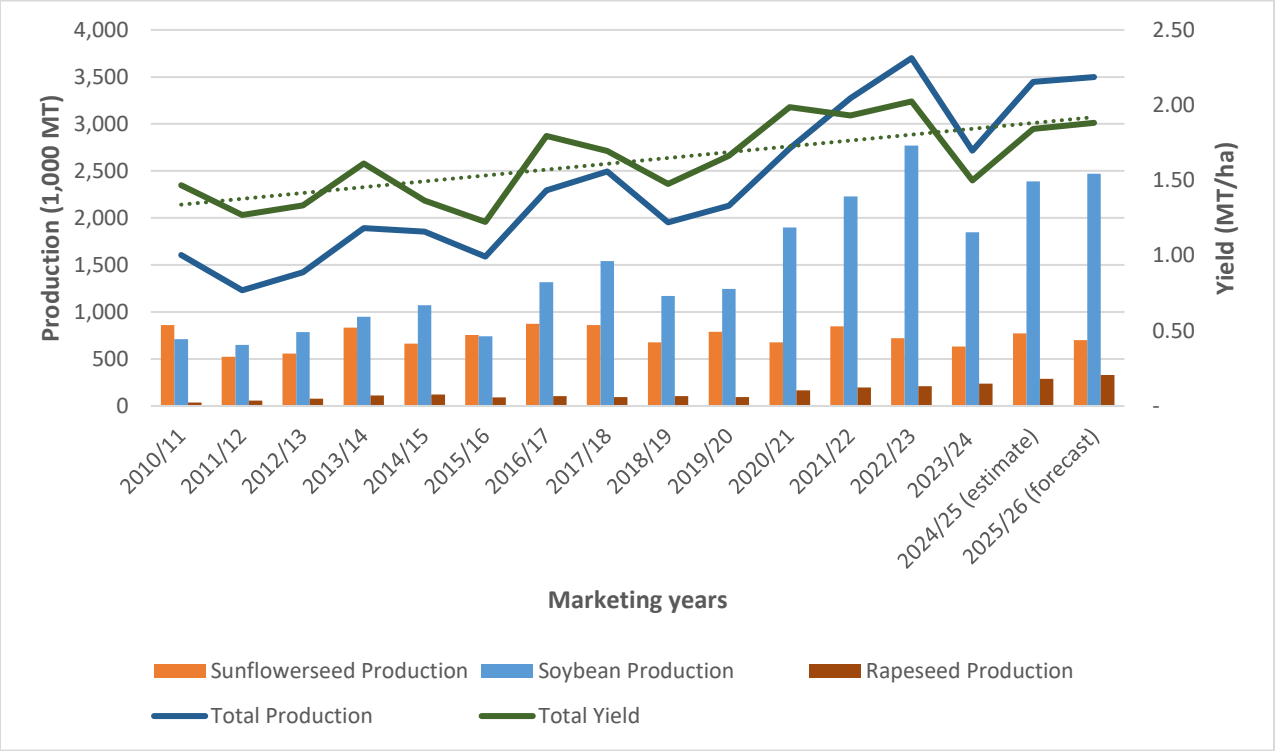
Production

FAS/Pretoria forecasts minor growth in oilseed production for South Africa in MY 2025/26 to 3.5 MMT, on expected flat area and assuming normal weather conditions and trend yields. If realized, the 3.5 MMT of oilseed production will be the second largest on record, 5 percent smaller than the 3.7 MMT of oilseeds produced in MY 2022/23. Soybean production is expected to grow by 3 percent to 2.5 MMT, and rapeseed by 15 percent to 330,000 MT, while sunflowerseed production is expected to fall by 9 percent to 700,000 MT (also see Figure 4).

South Africa's oilseed complex is experiencing constant growth in yield potential driven by adoption of advanced production technologies, such as genetically engineered seed, and more efficient and effective farming practices. Precision agriculture has been readily adopted by South African farmers who have been able to invest in supporting technology. Conservation farming is

also gaining in popularity, with no-till practices now favored by famers, particularly in Mpumalanga province. With most oilseeds in South Africa non-irrigated, lack of rainfall is the primary factor that drives temporary yield reductions (such as in MY 2023/24), despite the overall positive yield growth.

Figure 4: *Trends in Production and Yield of Oilseeds in South Africa*



Source: FAS/Pretoria using data from the South Africa Grain Information Services

For MY 2024/25, South Africa's summer rainfall production season started off slowly with sporadic showers during October 2024 and a heatwave in November 2024, affecting oilseed planting progress. However, in mid-December, respectable and continued rainfall over most parts of South Africa's oilseed production areas finally started enabling producers to plant approximately 1.7 Mha of soybeans and sunflowerseed. After a dry and hot January, above-average rainfall was recorded in February and March over most parts of the summer rainfall production area, boosting plant growth and pushing up anticipated yields.

In early March, FAS/Pretoria visited the major oilseed and grain producing areas of South Africa to interview industry analysts and assess crop conditions. In most areas, the oilseed crop appeared vigorous, though in some soybean fields germination problems occurred due to the lack of rainfall and high temperatures in the early parts of the growing season. However, the ample rainfall in February and March improved yield potential considerably.

This FAS/Pretoria positive yield outlook was shared by the South Africa's Crop Estimates Committee (CEC) second commercial production estimate for summer rainfall crops on March 26, 2025. According to the CEC, the South Africa soybean crop could surge by 29

percent to 2.4 MMT, the second largest on record, while the sunflowerseed crop could increase by 22 percent to 770,000 MT.

The CEC released its final estimate for winter rainfall crops on February 27, 2025 (MY 2024/25). Rapeseed production grew by 22 percent to a new record of 288,000 MT, illustrating favorable weather conditions throughout the production areas in the Western Cape province. Rapeseed production started in South Africa in the late 1990s after the opening of a rapeseed oil refinery in the Western Cape province. The opening of the processing facilities supplied farmers with a new market opportunity. The area under rapeseed more than doubled over the past 10 years to the current record level. Constant yield growth from new cultivars combined with firm crush demand is supporting the expansion in rapeseed area.

On February 13, 2025, the CEC finalized South Africa's soybeans and sunflowerseed crops for MY 2023/24 at 1.8 MMT and 632,000 MT, respectively. This means that South Africa's soybean crop dropped by 33 percent, the smallest crop the in the past three years, while the sunflower seed crop dropped by 12 percent, to the smallest crop in more than 10 years. An *El Niño* induced mid-summer drought in 2024 coupled with excessive heat across South Africa reduced the yield potential of the crops. This final calculation considers total producer deliveries in the marketing year as well as on-farm usage.

The following table details area planted, yield and production figures for soybean, sunflowerseed and rapeseed for MY 2023/24 (actual), MY 2024/25 (estimate), and MY 2025/26 (forecast).

Table 4: *Area (1,000 ha), Yield (MT/ha), and Production (1,000 MT) of Soybean, Sunflowerseed and Rapeseed in South Africa*

Oilseeds	**Area**	**Yield**	**Prod**	**Area**	**Yield**	**Prod**	**Area**	**Yield**	**Prod**
	MY 2023/24 (actual)			**MY 2024/25 (estimate)**			**MY 2025/26 (forecast)**		
Soybeans	1,150	1.6	1,848	1,151	2.1	2,390	1,150	2.1	2,470
Sunflowerseed	529	1.2	632	556	1.4	770	530	1.3	700
Rapeseed	131	1.8	236	166	1.7	288	180	1.8	330
TOTAL	**1,810**	**1.5**	**2,716**	**1,873**	**1.8**	**3,448**	**1,860**	**1.9**	**3,500**

Source: FAS/Pretoria estimates and data from the Crop Estimates Committee

Consumption

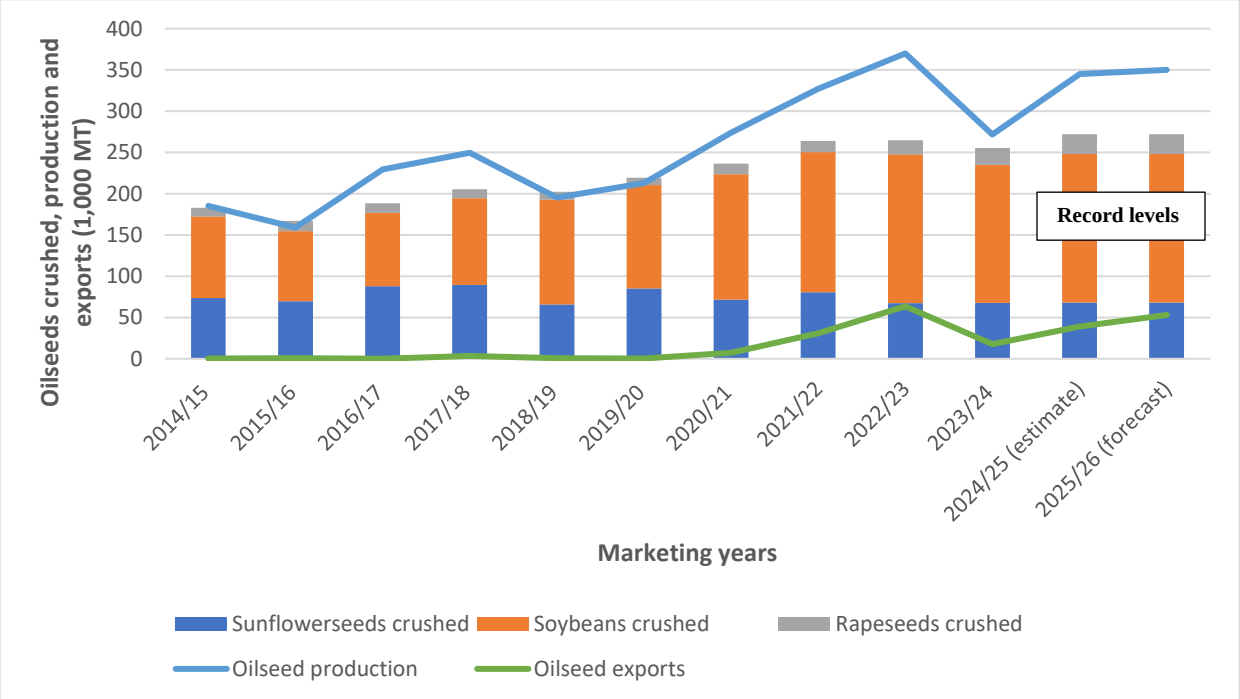
Crush

FAS/Pretoria forecasts that South Africa will crush a record 2.7 MMT of oilseeds in MY 2025/26 and MY 2024/25 as stocks will ensure sufficient supply to fully utilize crushing capacity (see Figure 5). In MY 2023/24, South Africa crushed 2.6 MMT of oilseeds, down 4 percent on lower production.

The bulk of soybean, sunflowerseed and rapeseed produced in South Africa are crushed to produce both edible oil for human consumption and protein meal for the inclusion in animal feed rations. Sunflower seed is a higher oil yielding seed, therefore more oriented towards human consumption. Sunflower meal, a by-product of the oil extraction process, is sold to animal feed manufacturers. In contrast, soybeans yield higher protein meal and are mainly crushed to be used by the animal feed sector. Rapeseed is mainly grown to be consumed as an edible oil. The oil is low in saturated fats and high in monounsaturated fats, which makes it a healthier alternative to other plant-based oils on the market. Rapeseed meal, a byproduct from the extraction process, is also used as livestock feed as a respectable source of protein. Rapeseed meal is used in dairy and pork production systems in the Western Cape province.

South Africa's total oilseed processing capacity is estimated at 2.8 MMT and is derived from a combination of dedicated soybean and sunflowerseed processing facilities, as well as crushing plants with the ability to switch between soybean and sunflowerseed. The rapeseed processing capacity is estimated at about 250,000 MT annually and has expanded in line with the surge in local production.

Figure 5: *Trends in Oilseeds Crushed in South Africa*



Source: FAS/Pretoria estimates and data from the South Africa Grain Information Services

Food Use

The food consumption of soybeans and sunflower seed is relatively small in South Africa, with neither part of common cuisines. FAS/Pretoria does not foresee major growth in the human consumption of soybeans and sunflower seeds in MY 2025/26 and MY2024/25.

Feed, Seed, Waste

Full fat soybean usage for animal feed is expected to grow to 200,000 MT in MY 2025/26 and MY 2024/25 on higher local soybean production and stable demand. In MY 2023/24 full fat soybean usage dropped by 30 percent on lower soybean production. Feed, seed, and waste consumption is estimated at around 220,000 MT in MY 2025/26 and MY 2024/25.

Table 5 illustrates the domestic utilization of sunflowerseed, soybean and rapeseed in South Africa for MY 2023/24 (actual), MY 2024/25 (estimate) and MY 2025/26 (forecast).

Table 5: *Sunflower Seed and Soybean Utilization in South Africa*

Oilseeds (1,000 MT)	Sun-flower	Soy-beans	Rape-seed	Total	Sun-flower	Soy-beans	Rape-seed	Total	Sun-flower	Soy-beans	Rape-seed	Total
	MY 2023/24 (actual)				MY 2024/25 (estimate)				MY 2025/26 (forecast)			
Crush	677	1,672	206	**2,555**	680	1,800	240	**2,720**	680	1,800	240	**2,720**
Food	1	22	0	**23**	2	25	0	**27**	2	25	0	**27**
Feed, seed & waste	10	118	8	**136**	10	200	10	**220**	10	200	10	**220**
Exports	0	150	27	**177**	0	360	30	**390**	0	450	80	**530**
TOTAL	**688**	**1,962**	**241**	**2,891**	**692**	**2,385**	**280**	**3,357**	**692**	**2,475**	**330**	**3,497**
Imports	1	154	0	155	0	0	0	0	0	0	0	0

Source: FAS/Pretoria estimates and data from the South Africa Grain Information Services

Trade

Exports

FAS/Pretoria forecasts that South Africa's oilseed exports will surge by 36 percent to 530,000 MT in MY2025/26 on higher production, after maximizing utilization of crushing facilities. This will be the second largest level of oilseeds exports by South Africa after the record of 636,000 MT in MY 2022/23. In MY 2024/25, FAS/Pretoria expects oilseeds exports to reach 390,000 MT after a drop of 72 percent in MY 2023/24. Oilseed production is expected to surge by 27 percent in MY 2024/25, recovering from the drought-reduced crop in MY 2023/24, with surplus stocks directed to the export market. In MY 2023/24, Zimbabwe was the major recipient of

South Africa's soybean exports because of elevated demand after last year's drought-stricken season, while rapeseed exports were focused on Kenya (see Table 6).

In the past, South Africa's trade in oilseeds was generally limited, as the bulk of production was destined for local crushing. However, with the surge in the local production of soybean and rapeseed exceeding crushing capacity, the country will continue to have oilseed stocks available for exports until new investment in crushing facilities commence. As a result, South Africa completed export protocols to China in 2022, opening the opportunity for exports to the world's largest soybean market. In MY 2022/23, South Africa exported almost 150,000 MT of soybeans to China.

Table 6: *South Africa's Oilseeds Exports in MY 2023/24*

	MY 2023/24 (Mar 1, 2024 – Feb 28, 2025)	**MY 2023/24 (Oct 1, 2023 – Sept 30, 2024)**	
Countries	**Soybean**	**Rapeseed**	**Total**
	(1,000 MT)		
Export Destinations			
Zimbabwe	106	0	106
Vietnam	28	0	28
Kenya	0	27	27
Eswatini	14	0	14
Botswana	2	0	2
Mozambique	1	0	1
Total Exports	**150**	**27**	**177**

Source: FAS/Pretoria using data from the South Africa Grain Information Services

Imports

FAS/Pretoria forecasts that imports of oilseeds will cease in MY 2025/26 and MY 2024/25 as the expected increase in local production will exceed utilization.

In MY 2023/24, South Africa imported 154,000 MT of soybeans, mostly from the United States, after a 33 percent drop in local production. A mid-summer drought caused average soybean yields to deteriorate to the lowest level over the past seven years, forcing South Africa to import to augment local production and meet crushing demand.

Although South Africa excepts imported genetically engineered (GE) products, asynchronous GE approvals pose a significant risk to trade as South Africa applies zero tolerance for unintentional presence of GE events in food and feed imports. South Africa is among the top 10 global producers of GE crops and has approved numerous GE soybean events for commercial cultivation. However, the list of GE soybean events cultivated in an exporting country must be synchronized with events that have been approved by the South African regulators for food and feed purposes. FAS/Pretoria worked closely with stakeholders to

resolve asynchronous GE events approvals between South Africa and the United States and received confirmation in September 2024 that U.S. GE soybean had been approved for imports into South Africa (see also Market Opens for United States Soybeans). Around 152,000 MT of U.S. soybeans have been exported to South Africa, to date, at an estimated value of US$44 million

Oilseed Import Duties

South Africa's current import duties for oilseeds were published in the early 2000's and have not change since then. The duty U.S. soybean export to South Africa is 8 percent. On the other hand, the Economic Partnership Agreement (EPA) between the Southern Africa Custom Union and the European Union (EU) and United Kingdom (UK) makes provision for duty-free imports of oilseeds. The current tariff schedule also allows for duty-free importation from South Africa's neighboring countries (see Table 7).

Table 7: *South Africa's Import Duties for Oilseeds*

Products (HS Code)	General (including the United States)	EU/UK	European Free Trade Association (EFTA)	Southern Africa Development Community (SADC)	Mercosur
Soybeans *(1201)*	8%	Free	8%	Free	8%
Sunflower seed *(1206)*	9.4%	Free	9.4%	Free	9.4%
Rapeseed *(1205)*	10%	Free	10%	Free	7.5%

Source: FAS/Pretoria using data from the South African Revenue Services

Stocks

Ending stocks of each of the oilseeds are expected to stabilize at around two months of annual processing in all three of the recorded marketing years. South Africa's storage capacity for grain and oilseeds exceeds 20 MMT and stocks are primarily stored by producer-owned agribusinesses (formerly cooperatives), traders, and processors. There is minimal interference by the South African government in the local oilseeds market. As a result, the South African government refrains from holding any oilseed stocks or mandating specific stock levels through regulations.

Oilseed Meals

Table 8: *Soybean Meal Production, Supply, and Distribution*

Meal, Soybean	2023/2024		2024/2025		2025/2026	
Market Year Begins	Mar 2024		Mar 2025		Mar 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	1700	1672	1750	1800	0	1800
Extr. Rate, 999.9999 (PERCENT)	0.8	0.8002	0.8	0.8	0	0.8
Beginning Stocks (1000 MT)	184	184	194	117	0	127
Production (1000 MT)	1360	1338	1400	1440	0	1440
MY Imports (1000 MT)	200	200	250	120	0	120
Total Supply (1000 MT)	1744	1722	1844	1677	0	1687
MY Exports (1000 MT)	220	215	200	140	0	140
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	1330	1390	1480	1410	0	1430
Total Dom. Cons. (1000 MT)	1330	1390	1480	1410	0	1430
Ending Stocks (1000 MT)	194	117	164	127	0	117
Total Distribution (1000 MT)	1744	1722	1844	1677	0	1687
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table 9: *Sunflowerseed Meal Production, Supply, and Distribution*

Meal, Sunflowerseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Mar 2024		Mar 2025		Mar 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	650	677	675	680	0	680
Extr. Rate, 999.9999 (PERCENT)	0.4262	0.4195	0.4252	0.4206	0	0.4206
Beginning Stocks (1000 MT)	24	24	21	35	0	36
Production (1000 MT)	277	284	287	286	0	286
MY Imports (1000 MT)	40	40	40	20	0	20
Total Supply (1000 MT)	341	348	348	341	0	342
MY Exports (1000 MT)	15	18	15	15	0	15
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	305	295	300	290	0	290
Total Dom. Cons. (1000 MT)	305	295	300	290	0	290
Ending Stocks (1000 MT)	21	35	33	36	0	37
Total Distribution (1000 MT)	341	348	348	341	0	342
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table 10: *Rapeseed Meal Production, Supply, and Distribution*

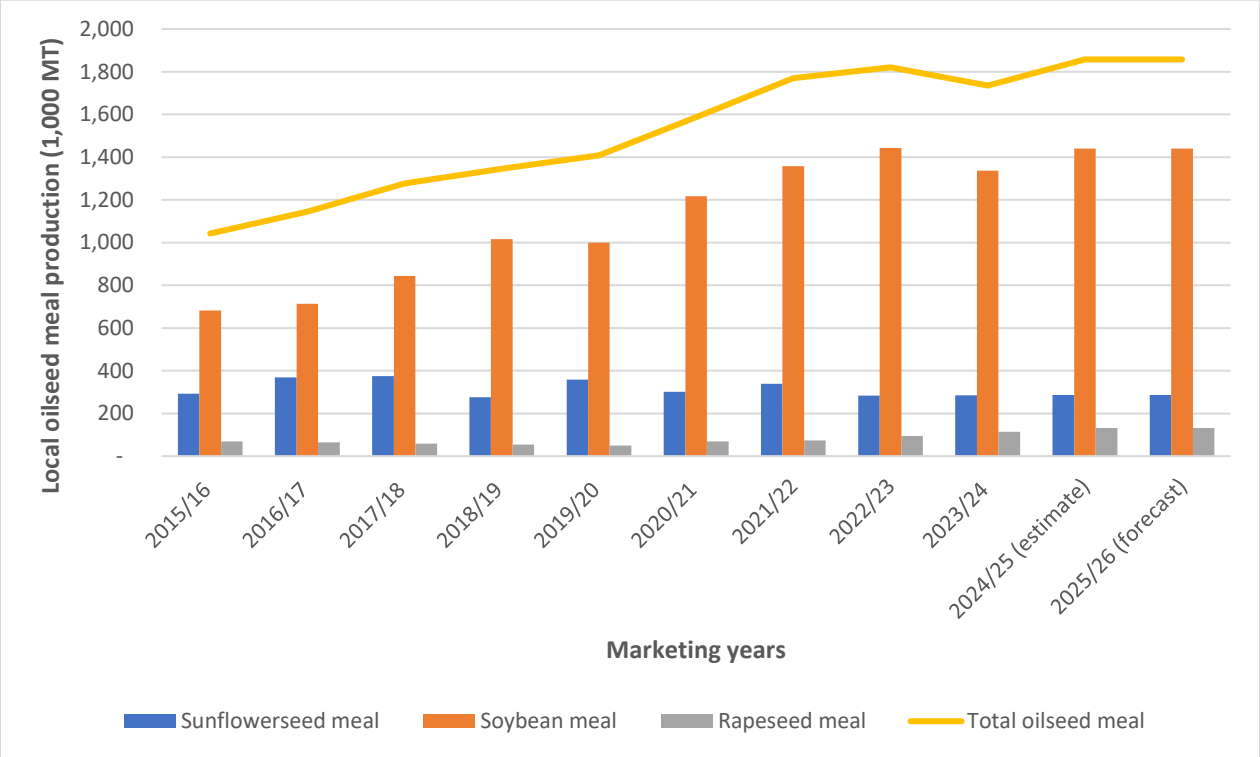
Meal, Rapeseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	170	206	175	240	0	240
Extr. Rate, 999.9999 (PERCENT)	0.5824	0.5485	0.6	0.55	0	0.55
Beginning Stocks (1000 MT)	7	7	6	10	0	12
Production (1000 MT)	99	113	105	132	0	132
MY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	106	120	111	142	0	144
MY Exports (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	100	110	105	130	0	130
Total Dom. Cons. (1000 MT)	100	110	105	130	0	130
Ending Stocks (1000 MT)	6	10	6	12	0	14
Total Distribution (1000 MT)	106	120	111	142	0	144
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

FAS/Pretoria forecasts that South Africa's oilseed meal production will reach record levels of 1.9 MMT in MY 2025/26 and MY 2024/25 at optimal crushing capacity. Figure 6 illustrates the expanding trend in oilseed meal production in South Africa after investments in local oilseed processing capacity over the years. However, South Africa's current unfavorable economic conditions and additional operational costs imposed by rolling blackouts could prevent additional investments to expand crushing capacity. In addition, meat consumption growth is expected to slow due to economic challenges, restricting demand growth for oilseed meal usage in animal feed.

The production of soybean, sunflowerseed, and rapeseed meal in South Africa is shown in Table 11 for MY 2023/24 (actual), MY 2024/25 (estimate), and MY 2025/26 (forecast). The extraction rates for meal are estimated by the South African Animal Feed Manufactures Association at 42 percent for sunflowerseed, 80 percent for soybean, and 55 percent for rapeseed.

Figure 6: *Trends in Oilseed Meal Production in South Africa*



Source: FAS/Pretoria estimates and data from the South Africa Grain Information Services

Table 11: *Oilseed Meal Production in South Africa*

	Crushed (1,000 MT)			Meal produced (1,000 MT)		
Marketing years	**2023/24**	**2024/25**	**2025/26**	**2023/24**	**2024/25**	**2025/26**
Sunflowerseed (42% meal)	677	680	680	284	286	286
Soybean (80% meal)	1,672	1,800	1,800	1,338	1,440	1,440
Rapeseed (55% meal)	206	240	240	113	132	132
TOTAL	**2,555**	**2,720**	**2,720**	**1,735**	**1,858**	**1,858**

Source: FAS/Pretoria estimates and data from the South Africa Grain Information Services

Feed Consumption

FAS/Pretoria projects marginal growth to 1.9 MMT in the feed consumption of soybean, sunflowerseed, and rapeseed meal in MY 2025/26 over MY 2024/25 (see Table 12 and Table 13). South Africa's economic challenges are likely to restrain growth in consumer demand for poultry and livestock products, which will limit any major expansion to demand for animal feed. South Africa's economic growth outlook over the medium term continues to be limited. The country's Gross Domestic Product (GDP) grew by a dismal 0.6 percent in 2024 and is expected to expand by less than 2 percent in 2025 and 2026. Furthermore, South Africa's unemployment rate remains high at about 32 percent. The reasons for South Africa low economic growth include frequent electricity supply shortages, policy uncertainty, logistical infrastructure challenges, and a declining investment climate, all of which significantly hinder economic growth and development

Table 12: *Soybean Meal, Sunflowerseed Meal and Rapeseed Meal Consumption in South Africa*

Marketing year (1,000 MT)	**2023/24**	**2024/25**	**2025/26**
Soybean meal	1,390	1,410	1,430
Sunflowerseed meal	295	290	290
Rapeseed meal	110	130	130
TOTAL	**1,795**	**1,830**	**1,850**

Source: FAS/Pretoria estimates and data from the Animal Feed Manufacturing Association

Table 13: *Meal Demand in South Africa as Soybean Meal Equivalent (SME)*

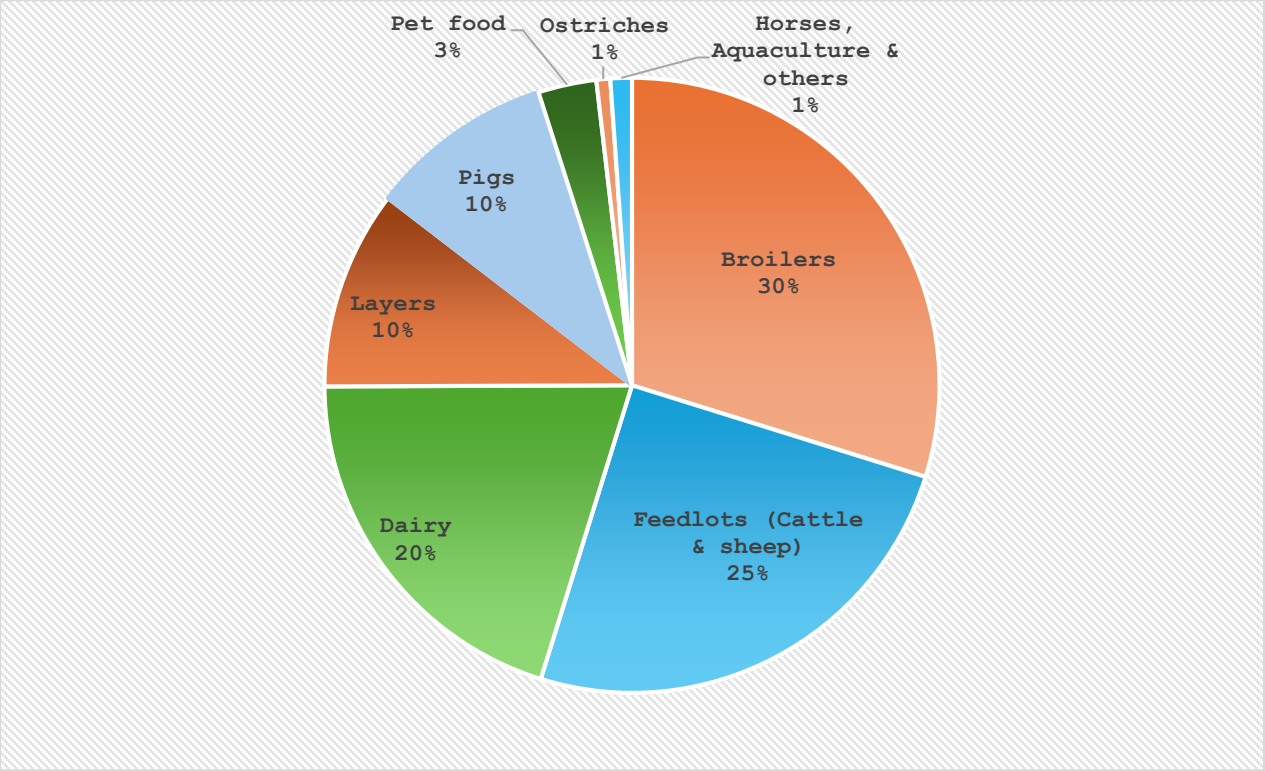
Marketing year (1,000 MT)	**2023/24**	**2024/25**	**2025/26**
Soybean	1,390	1,410	1,430
Sunflowerseed	197	193	193
Canola	78	92	92
Fish	13	15	15
Cotton	10	10	10
Copra	2	2	2
TOTAL	**1,690**	**1,722**	**1,742**

Source: FAS/Pretoria estimates and data from the Animal Feed Manufacturing Association

Oilseed meal is an important source of protein for animal feed manufacturing. Soybean meal is the most important protein used by feed manufacturers in South Africa and typically represents more than 70 percent of protein meal usage in animal feed. Soybean meal and sunflower seed meal together represent about 85 percent of protein usage by feed manufacturers in South Africa. The average inclusion rate of protein meal in feed rations is between 20 and 30 percent. Corn, as the key source of carbohydrates, is the main product used by feed manufacturers with more than 50 percent inclusion rate in feed rations. The use of fishmeal as a protein source in feed rations is determined by availability, product mix, and price in relation to other available protein sources. However, the inclusion rate of fishmeal by South African animal feed manufactures has been minimal in recent years at less than one percent (for a detail report on the South African Animal Feed Industry see FAS/Pretoria's GAIN Report: The South African Animal Feed Industry)

The production of animal feed by type in South Africa is illustrated in Figure 7. Feed for broilers and layers represent about 40 percent of total feed manufactured in South Africa, followed by feed for cattle and sheep feedlots and the dairy industry.

Figure 7: *Animal Feed Production in South Africa by Type*



Source: FAS/Pretoria using Animal Feed Manufacturing Association data

Industrial Consumption

South Africa does not consume any notable amount of meal for this purpose.

Food Use

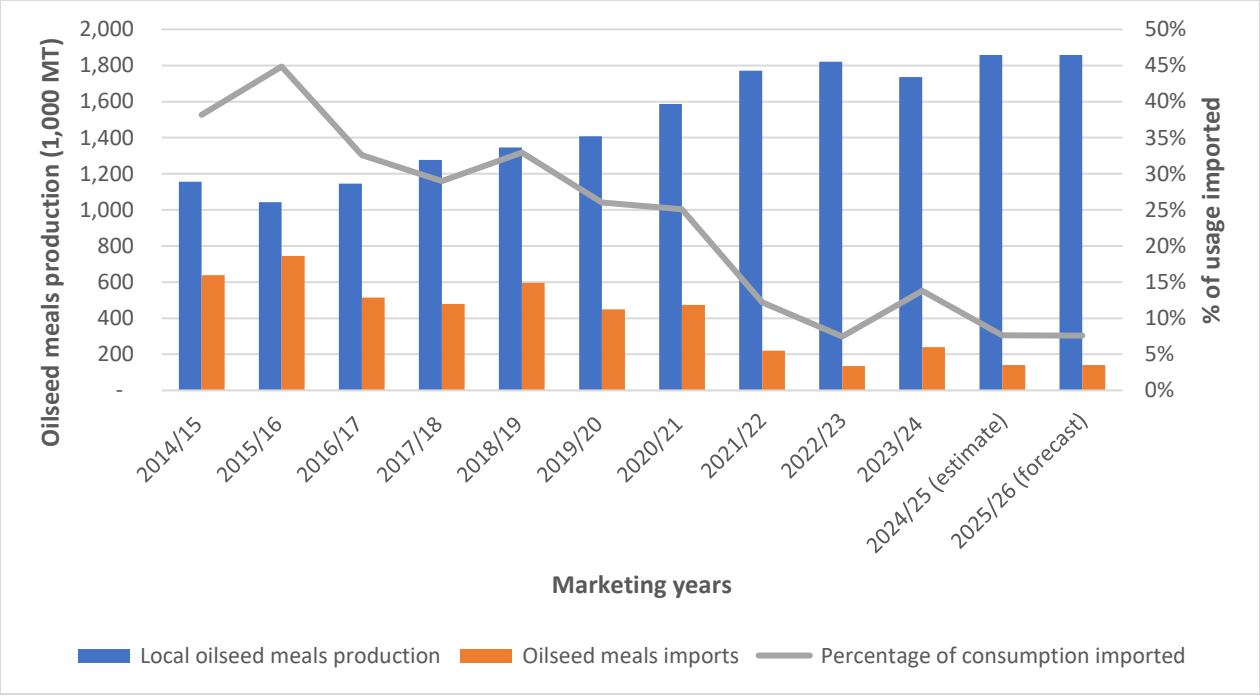
South Africa does not consume any notable amount of meal for this purpose.

Trade

Imports

FAS/Pretoria forecasts that South Africa's oilseed meal imports will stay flat at about 140,000 MT in MY 2025/26 and MY 2024/25 as locally produced meal reaches record levels, with only marginal growth in domestic usage expected. Figure 8 illustrates the trend in the replacement of oilseed meal imports with locally produced oilseed meal in South Africa, after investments to expand crushing capacity. Currently less than 10 percent of locally consumed oilseed meal originates from imports. However, the high cost of transportation, which occurs mainly by road, from South Africa's summer rainfall production regions in the north to the coastal areas in the south, makes it likely that South Africa will continue importing some soybean meal to the coastal regions. Almost all of South Africa's oilseed meal imports originate from Argentina, mostly due to price competitiveness.

Figure 8: *Trends in the Replacement of Oilseed Meal Imports with Locally Produced Meal in South Africa*



Sources: FAS/Pretoria estimates and data Trade Data Monitor LLC

Exports

South Africa exports oilseed meal to neighboring countries, but less than 10 percent of local production is exported. FAS/Pretoria estimates that South Africa oilseed meal exports in MY 2025/26 and MY 2024/25 will be lower than in MY 2023/24, when demand for animal feed in the region surged after the drought condition in 2024.

Oilseed Meal Import Duties

Table 14 specifies the import duties that apply on oilseed meal imports into South Africa, with a 6.6 percent duty for most oilseed meal imports. The Economic Partnership Agreement between the Southern Africa Custom Union and the EU and UK allows for duty-free imports of oilseed meals from those markets. The current tariff schedule also allows for duty-free importation from South Africa's neighboring countries.

Table 14: *South Africa's Import Tariffs for Oilseed Meal*

Products (HS Code)	General (including the United States)	EU/UK	European Free Trade Association (EFTA)	Southern Africa Development Community (SADC)	Mercosur
Soybean meal					
2304	6.6%	Free	6.6%	Free	4.95%
230250	Free	Free	Free	Free	Free
120810	20%	Free	20%	Free	20%
Sunflowerseed meal					
230630	6.6%	Free	6.6%	Free	6.6%
Rapeseed meal					
230641	6.6%	Free	6.6%	Free	6.6%
230649	6.6%	Free	6.6%	Free	6.6%

Source: FAS/Pretoria using data from the South African Revenue Services

Stocks

Stocks of oilseed meal are not expected to fluctuate much over the reporting period due to restricted storage capacity. Stocks are privately owned and are limited to about four to six weeks' worth of consumption.

Oils

Table 15: *Soybean Oil Production, Supply, and Distribution*

Oil, Soybean	2023/2024		2024/2025		2025/2026	
Market Year Begins	Mar 2024		Mar 2025		Mar 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	1700	1672	1750	1800	0	1800
Extr. Rate, 999.9999 (PERCENT)	0.18	0.1794	0.18	0.18	0	0.18
Beginning Stocks (1000 MT)	26	26	22	16	0	15
Production (1000 MT)	306	300	315	324	0	324
MY Imports (1000 MT)	20	20	55	25	0	25
Total Supply (1000 MT)	352	346	392	365	0	364
MY Exports (1000 MT)	100	100	85	100	0	100
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	230	230	280	250	0	250
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	230	230	280	250	0	250
Ending Stocks (1000 MT)	22	16	27	15	0	14
Total Distribution (1000 MT)	352	346	392	365	0	364
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table 16: *Sunflower Oil Production, Supply, and Distribution*

Oil, Sunflowerseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Mar 2024		Mar 2025		Mar 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	650	677	675	680	0	680
Extr. Rate, 999.9999 (PERCENT)	0.4185	0.3796	0.4178	0.3794	0	0.3794
Beginning Stocks (1000 MT)	37	37	29	37	0	35
Production (1000 MT)	272	257	282	258	0	258
MY Imports (1000 MT)	180	155	190	150	0	150
Total Supply (1000 MT)	489	449	501	445	0	443
MY Exports (1000 MT)	55	67	55	70	0	70
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	405	345	415	340	0	340
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	405	345	415	340	0	340
Ending Stocks (1000 MT)	29	37	31	35	0	33
Total Distribution (1000 MT)	489	449	501	445	0	443
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table 17: *Rapeseed Oil Production, Supply, and Distribution*

Oil, Rapeseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	170	206	175	240	0	240
Extr. Rate, 999.9999 (PERCENT)	0.4176	0.4223	0.4229	0.4167	0	0.4167
Beginning Stocks (1000 MT)	6	6	7	5	0	6
Production (1000 MT)	71	87	74	100	0	100
MY Imports (1000 MT)	5	0	5	0	0	0
Total Supply (1000 MT)	82	93	86	105	0	106
MY Exports (1000 MT)	0	3	0	4	0	4
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	75	85	77	95	0	95
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	75	85	77	95	0	95
Ending Stocks (1000 MT)	7	5	9	6	0	7
Total Distribution (1000 MT)	82	93	86	105	0	106
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

FAS/Pretoria forecasts that South Africa's locally produced oilseed oils will reach record levels of 682,000 MT in MY 2025/26 and MY 2024/25 on increased availability of crushing stocks. In Table 18, the production of soybean, sunflower, and rapeseed oil in South Africa is shown for MY 2023/24 (actual), MY 20224/25 (estimate), and MY 2025/26 (forecast). The extraction rates for oil are estimated at 38 percent for sunflowerseed, 18 percent for soybeans, and 42 percent for rapeseed.

Table 18: *Oilseed Oil Production in South Africa*

	Crushed (1,000 MT)			Oil produced (1,000 MT)		
Marketing years	**2023/24**	**2024/25**	**2025/26**	**2023/24**	**2024/25**	**2025/26**
Sunflower (38% oil)	677	680	680	257	258	258
Soybean (18% oil)	1,672	1,800	1,800	300	324	324
Rapeseed (42% oil)	206	240	240	87	100	100
TOTAL	**2,555**	**2,720**	**2,720**	**644**	**682**	**682**

Source: FAS/Pretoria estimates and data from the South Africa Grain Information Services

Food Consumption

FAS/Pretoria estimates South Africa's consumption of plant oil at around 1.3 MMT with constrained growth prospects due to limited economic progress. The demand for plant oils is sensitive to changes in consumer purchasing power and there is growing pressure on consumer spending due to the high cost of living, coupled with an unemployment rate of more than 30 percent. These factors will limit growth in the demand for plant oils in South Africa

Palm oil imports continue to play an important role in the South African edible oil consumption mix with a broad use in the food service sector as a frying oil, due to its relative affordability and favorable heating properties. South Africa's palm oil imports, mainly from Indonesia and Malaysia, surged over the past 10 years and are expected to reach a record of 550,000 MT in MY 2025/26. As a result, the share of palm oil in the total South African plant oil consumption mix accelerated to more than 40 percent. South Africa does not have a suitable climate to produce palm oil, so imports are expected to continue rising. In Table 19, the estimated consumption of soybean oil, sunflower oil, rapeseed oil, palm oil, and other edible oils in South Africa are indicated for MY 2023/24, MY 2024/25, and MY 2025/26.

Table 19: *The Estimated Consumption of Plant Oils in South Africa*

Marketing year (1,000 MT)	2023/24	2024/25	2025/26
Sunflower oil	345	340	340
Soybean oil	230	250	250
Rapeseed oil	85	95	95
Palm oil	525	535	550
Other oils	15	15	15
TOTAL	**1,200**	**1,235**	**1,250**

Source: FAS/Pretoria estimates and data from Trade Data Monitor LLC

Industrial Consumption

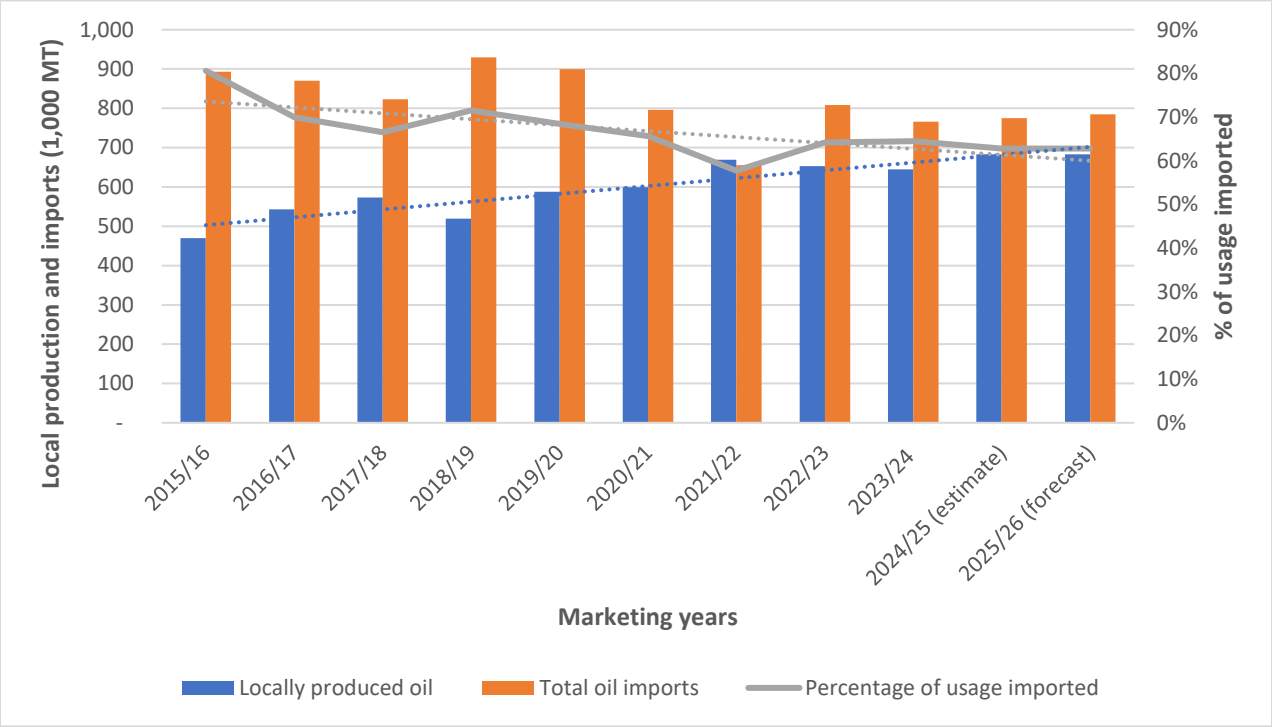
South Africa does not consume any notable amount of oil for this purpose.

Trade

Imports

FAS/Pretoria forecasts that South Africa's soybean oil and sunflower oil imports will remain flat in MY 2025/26 and MY 2024/25 reflecting limited growth in domestic use. The three major countries that supplied South Africa with sunflower oil in MY 2023/24 were Bulgaria, the Netherlands, and Argentina, while most soybean oil imports came from the Netherlands. The contribution of imported plant oils to local consumption has declined to 63 percent from 80 percent ten years ago (see Figure 9) on increased local crushing infrastructure.

Figure 9: *Trends in South Africa's Local Production and Imports of Edible Oils*



Source: FAS/Pretoria estimates and data from Trade Data Monitor LLC

Exports

South Africa exports about 25 percent of locally produced oilseed oils to neighboring countries. Post estimates that South Africa will continue oilseed oil exports in MY 2025/26 and MY 2024/25 on sustained local oilseed oil production and regional demand.

Oilseed Oils Import Duties

Table 20 specifies the import duties that apply on oilseed oil imports into South Africa, with a general import duty of 10 percent for most imported oils. However, the Economic Partnership Agreement between the Southern Africa Custom Union and the EU and UK makes provision for duty-free imports of oilseed oils from these markets.

Table 20: *South Africa's Import Tariffs for Oilseed Oils*

Products (HS Code)	General (including the United States)	EU/UK	European Free Trade Association (EFTA)	Southern Africa Development Community (SADC)	Mercosur
Soybean oil					
1507	10%	Free	10%	Free	10%
Sunflowerseed oil					
151211	10%	Free	10%	Free	10%
151219	10%	Free	10%	Free	10%
Rapeseed oil					
1514	10%	Free	10%	Free	10%

Source: FAS/Pretoria using data from the South African Revenue Services

Stocks

No significant fluctuations in sunflower oil, soybean oil, or rapeseed oil stocks are expected over the reporting period. Stocks represent to about four to six weeks' worth of consumption and are privately held by food processors, retailers, and importers.

Attachments:

No Attachments