

Voluntary Report – Voluntary - Public Distribution

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Report Name: Sorghum Imports to Raise on Low Stocks and
Production

Country: South Africa - Republic of

Post: Pretoria

Report Category: Grain and Feed

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Report Highlights:

South Africa's sorghum imports are expected to be elevated over the next two marketing years on lower production coupled with lower stocks as production continues to decline. Sorghum production in South Africa dropped over the past two decades as producers switched to plant corn and oilseeds due to the higher yields and profits. Unless technology changes occur that improve sorghum productivity, the declining trend in sorghum production in South Africa will continue. Over the past 10 years, the United States has established itself as the major exporter of sorghum to South Africa. Sorghum is mainly used for human consumption in South Africa.

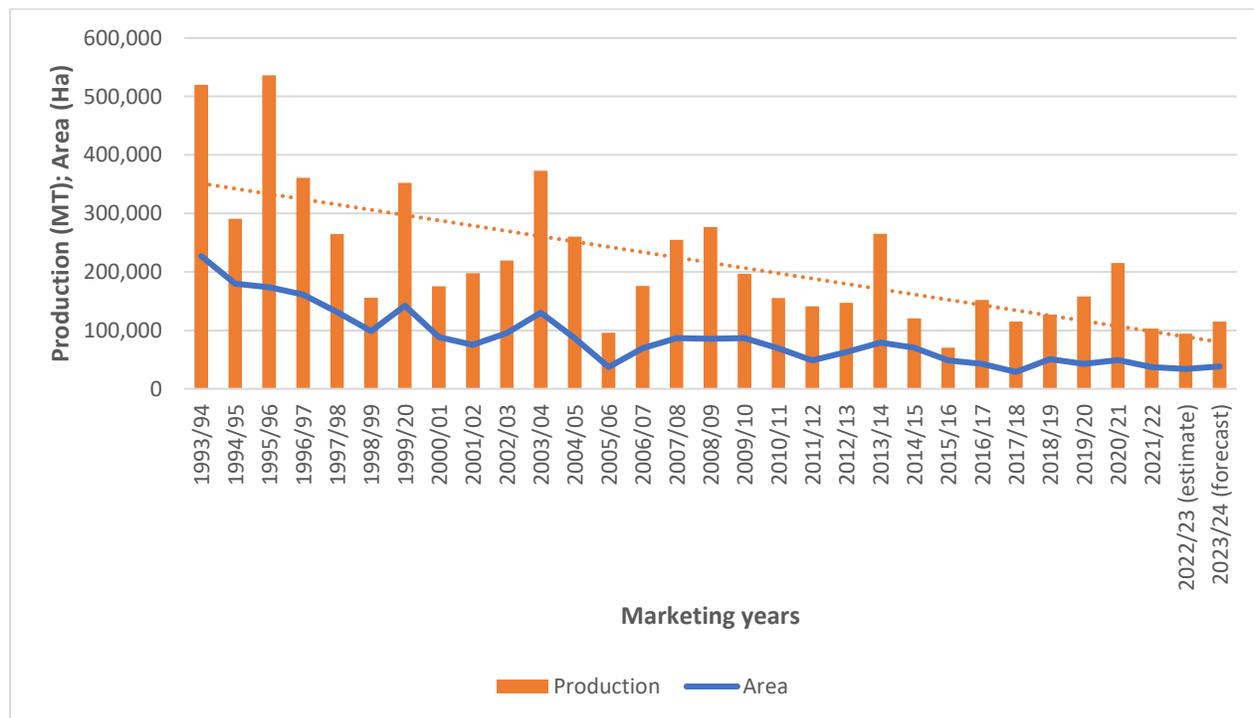
Production

After the deregulation of South Africa’s agricultural markets in 1997, sorghum production declined dramatically from an average production of more than 420,000 metric tons (MT) per annum, to less than 100,000 MT in marketing year (MY) 2022/23 (also see Figure 1). Sorghum area reached an all-time low of 28,800 hectares (ha) in the MY 2017/18 from a planted area of more than 200,000 ha before the deregulation of agricultural markets. Sorghum yields have failed to improve at the as rapidly as other crops like corn, resulting in less competitive gross margins (see also Figure 2). Therefore, local sorghum producers switched from sorghum to other crops like corn and oilseeds. Although 30 years ago sorghum was the third most important field crop in South Africa, today it ranks seventh, after corn, soybeans, wheat, sunflower, barley, and canola.

South Africa’s annual “intention to plant survey”, which is done by the Crop Estimates Committee (CEC), was released on October 26, 2023. According to the survey, producers plan to increase sorghum area by 12 percent or 4,000 ha to 38,000 ha in MY 2023/24. However, this will still be the fourth lowest area under sorghum on record in South Africa. Assuming normal climatic conditions, Post estimates a slight increase in sorghum production in MY 2023/24 to 115,000 MT. In MY 2022/23, South Africa produced an estimated 94,360 MT of sorghum, down 9 percent from the 103,140 produced in MY 2021/22 (see Table 1)

Figure 1

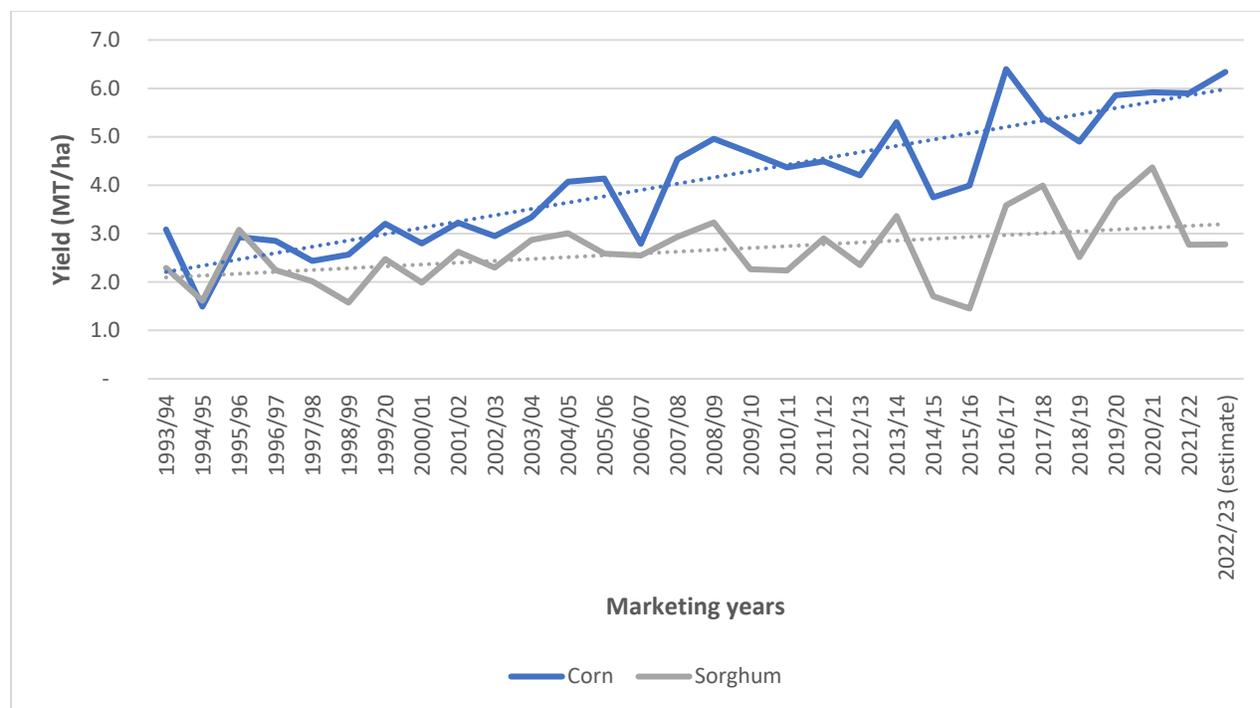
Trends in Sorghum Area and Production in South Africa



Source: South African Grain Information Services (Sagis)

Figure 2

Yield Trends of Corn and Sorghum in South Africa



Source: Sagis

Table 1

Area Planted and Production of Sorghum in South Africa

MY	Area (1,000 ha)	Yield (MT/ha)	Production (1,000 MT)
2021/22	37	2.8	103
2022/23 (estimate)	34	2.8	94
2023/24 (forecast)	38	3.0	115

Source: CEC; Post calculations

Consumption

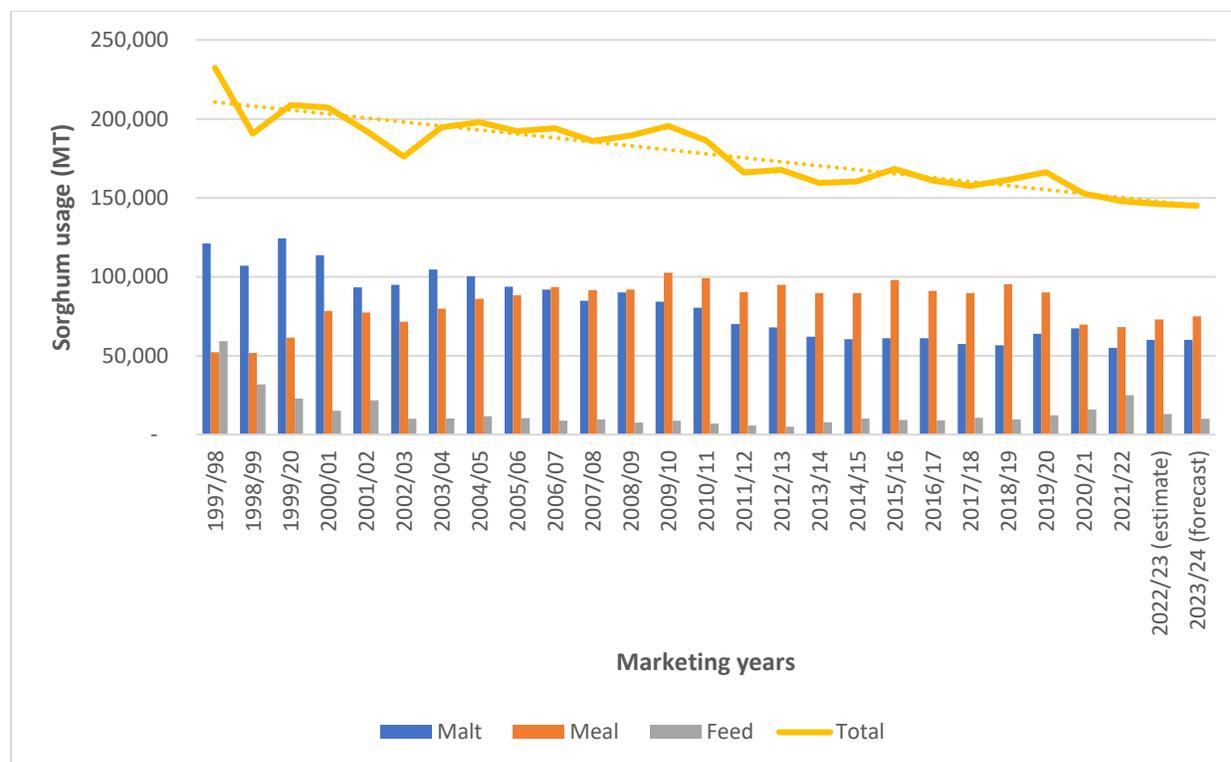
In South Africa, sorghum is mainly used for human consumption, which includes food (sorghum meal) and beverage (malt) consumption. Sorghum grain is a nutritious food, rich in protein, dietary fiber, vitamin B, and minerals. However, total sorghum consumption in South Africa declined by more than 20 percent over the past two decades, mainly due to the reduction in the usage of sorghum for malt (see Figure 3). Malt is used for manufacturing sorghum beer (traditional African beer). Sorghum used for malting fell by more than 40 percent over the past 20 years to about 60,000 MT as consumers prefer lagers over sorghum beer. However, malting rose in South Africa when pandemic-related restrictions on alcohol sales spurred a resurgence in home brewing. According to Sagis, in MY 2020/21 sorghum usage as malt nearly overtook usage as meal for the first time in fifteen years.

Otherwise, human consumption of sorghum in South Africa is in the form of sorghum meal. Sorghum meal, also known as “mabele,” competes with other grain products like corn meal and wheat products and is generally served as a breakfast cereal. South Africa’s sorghum meal consumption is slowly progressing back to levels seen before the pandemic (see also Figure 3) and appears to be generally trending upward due to cultural preference in some regions of South Africa. However, South Africa produced its fourth consecutive bumper corn crop and second-largest crop on record in MY 2022/23, putting downward pressure on local corn prices and making corn meal one of the most affordable source of carbohydrates. Facing high levels of food inflation, South African consumers are largely selecting the most-reasonably priced among close substitutes. As a result, Post estimates only a marginal increase in sorghum meal consumption in MY 2023/24 to 75,000 MT.

Only a small percentage of sorghum in South Africa ends up as animal feed, as corn is the preferred grain used by animal feed manufacturers. The animal feed market is comprised of sorghum processed mainly for poultry feed, but also for livestock and pet food. Post foresees a decline in the demand for sorghum in the animal feed market in MY 2022/23 and MY 2023/24 (see Table 2) due to the outbreak of Highly Pathogenic Avian Influenza (HPAI) in South Africa and the culling of around 7.5 million chickens since May 2023 (also see [South Africa battles highly pathogenic avian influenza](#)).

Figure 3

Sorghum Usage in South Africa



Source: Sagis

Table 2

Consumption of Sorghum in South Africa

MY (1,000 MT)	Sorghum meal	Malt	Total human consumption	Animal feed	TOTAL
2021/22	68	55	123	25	148
2022/23 (estimate)	73	60	133	13	146
2023/24 (forecast)	75	60	135	10	145

Source: Sagis; Post calculations

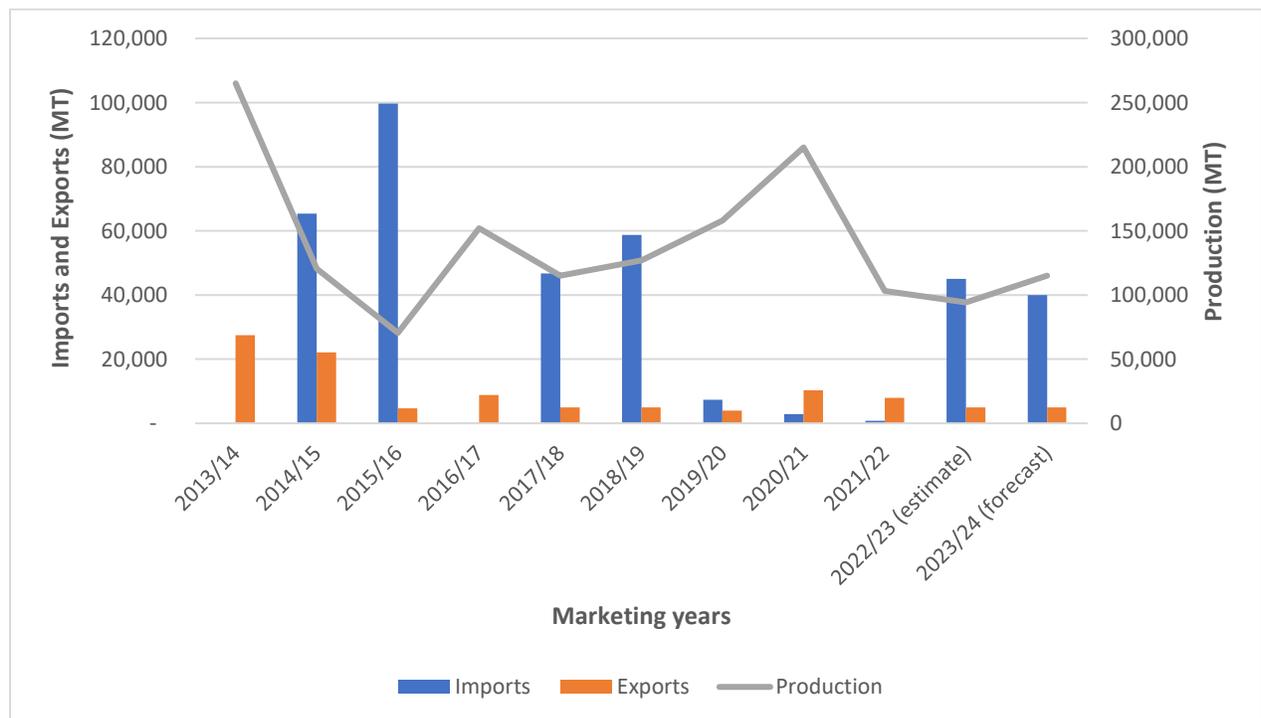
Trade

South Africa’s sorghum imports are expected to rise in MY 2022/23 and MY 2023/24 on lower production and declining stock levels (see Figure 4). Over the past 10 years, the United States has established itself as the major exporter of sorghum to South Africa with a more than 85 percent share of the total sorghum imports by South Africa. So far in MY 2022/23 (May to September 2023), the United States already exported almost 30,000 MT of sorghum to South Africa. Post estimates total sorghum imports by South Africa will reach 45,000 MT in MY 2022/23 on a decline in production. In MY 2023/24, Post estimates South Africa will import about 40,000 MT of sorghum to meet local demand.

South Africa continues to export small amounts of sorghum to neighboring countries, especially Botswana and Eswatini, where it is used to produce sorghum meal and traditional beer. In MY 2021/22, exports amounted to 8,000 MT. Post estimates that exports will drop to about 5,000 MT in MY 2022/23 and MY 2023/24 on lower local production.

Figure 4

South Africa’s Imports and Exports of Sorghum



Source: Sagis; Post calculations

Table 3*Sorghum Production, Supply, and Distribution*

Sorghum Market Year Begins	2021/2022		2022/2023		2023/2024	
	May 2022		May 2023		May 2024	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	37	37	35	34	40	38
Beginning Stocks (1000 MT)	84	84	32	32	19	20
Production (1000 MT)	103	103	100	94	150	115
MY Imports (1000 MT)	1	1	35	45	5	40
TY Imports (1000 MT)	1	1	30	40	5	35
TY Imp. from U.S. (1000 MT)	15	15	36	36	0	35
Total Supply (1000 MT)	188	188	167	171	174	175
MY Exports (1000 MT)	8	8	8	5	5	5
TY Exports (1000 MT)	11	11	7	5	5	5
Feed and Residual (1000 MT)	25	25	15	13	10	10
FSI Consumption (1000 MT)	123	123	125	133	140	135
Total Consumption (1000 MT)	148	148	140	146	150	145
Ending Stocks (1000 MT)	32	32	19	20	19	25
Total Distribution (1000 MT)	188	188	167	171	174	175
Yield (MT/HA)	2.8	2.8	2.9	2.8	3.8	3.0

(1000 HA) ,(1000 MT) ,(MT/HA)
 MY = Marketing Year, begins with the month listed at the top of each column
 TY = Trade Year, which for Sorghum begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Attachments:

No Attachments.