

Bureau for Food and  
Agricultural Policy

BEAP


*BASILLINE*

*2010*

# www.bfap.co.za

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BUREAU FOR FOOD AND AGRICULTURAL POLICY



**The 2010 BFAP Baseline Launch:**  
11 August 2010 Pretoria  
13 August 2010 Stellenbosch

**Inflation Rates**

2%	4%
4.2%	5.4%

**Interest Rates**


6.50	
10.00	
R 157.00	7.61
R 186.00	8.45

**Partners:** University of Pretoria, University of Stellenbosch, ABSA, National Agricultural Marketing Council, South African Wheat Growers' Association, Food and Agricultural Policy Research Institute (FAPRI)

**BFAP BASELINE 2010**

**CONTACT US IF YOU WISH TO LEARN MORE ABOUT THE BFAP AGRIBENCHMARK NETWORK.**

**IMPACT OF ELECTRICITY INCREASES ON AGRICULTURE - COMING SOON!**



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~~Baseline 20019~~

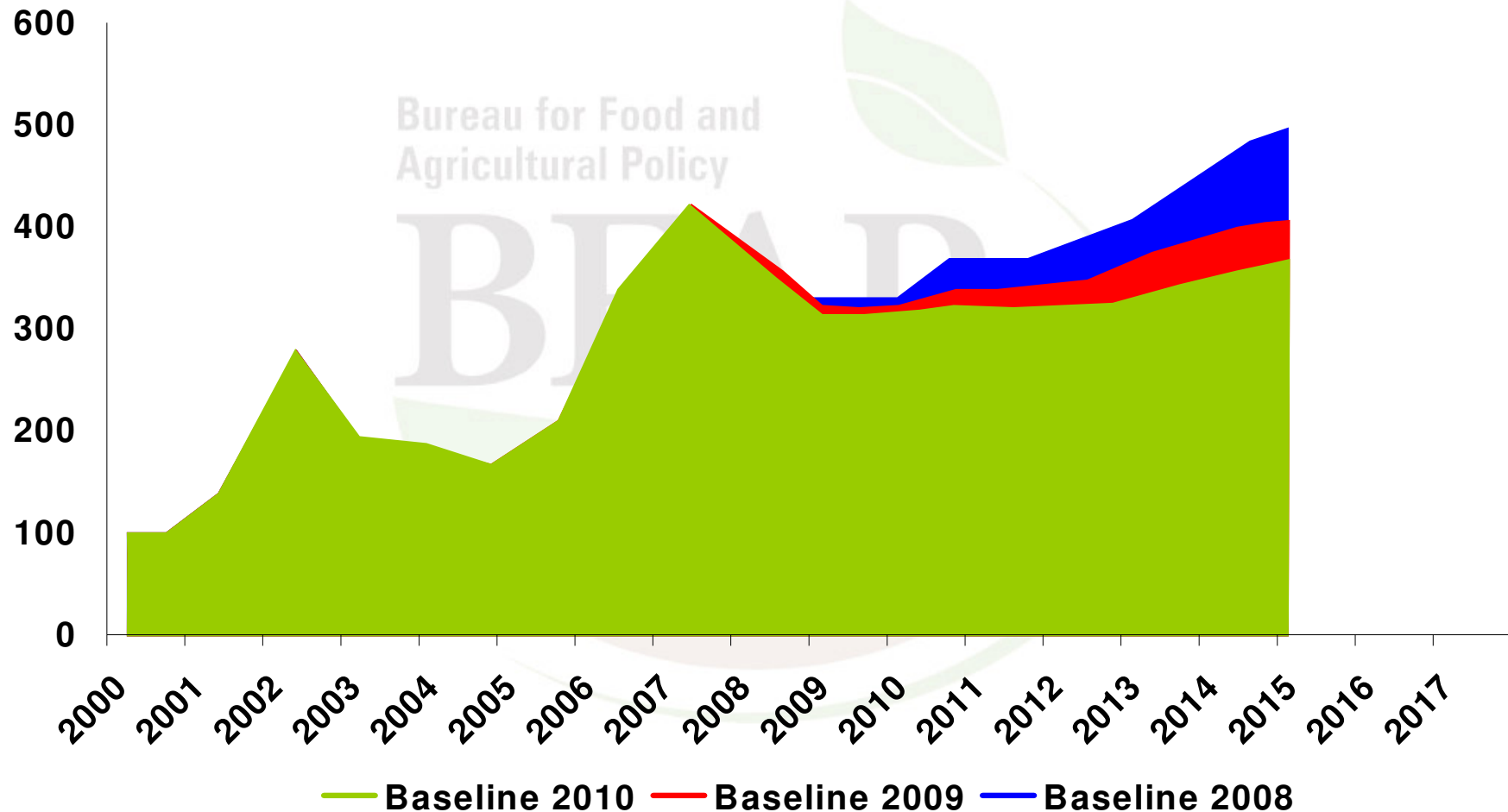
# The future of agriculture...?



Is there another  
Who is still on  
the boat???



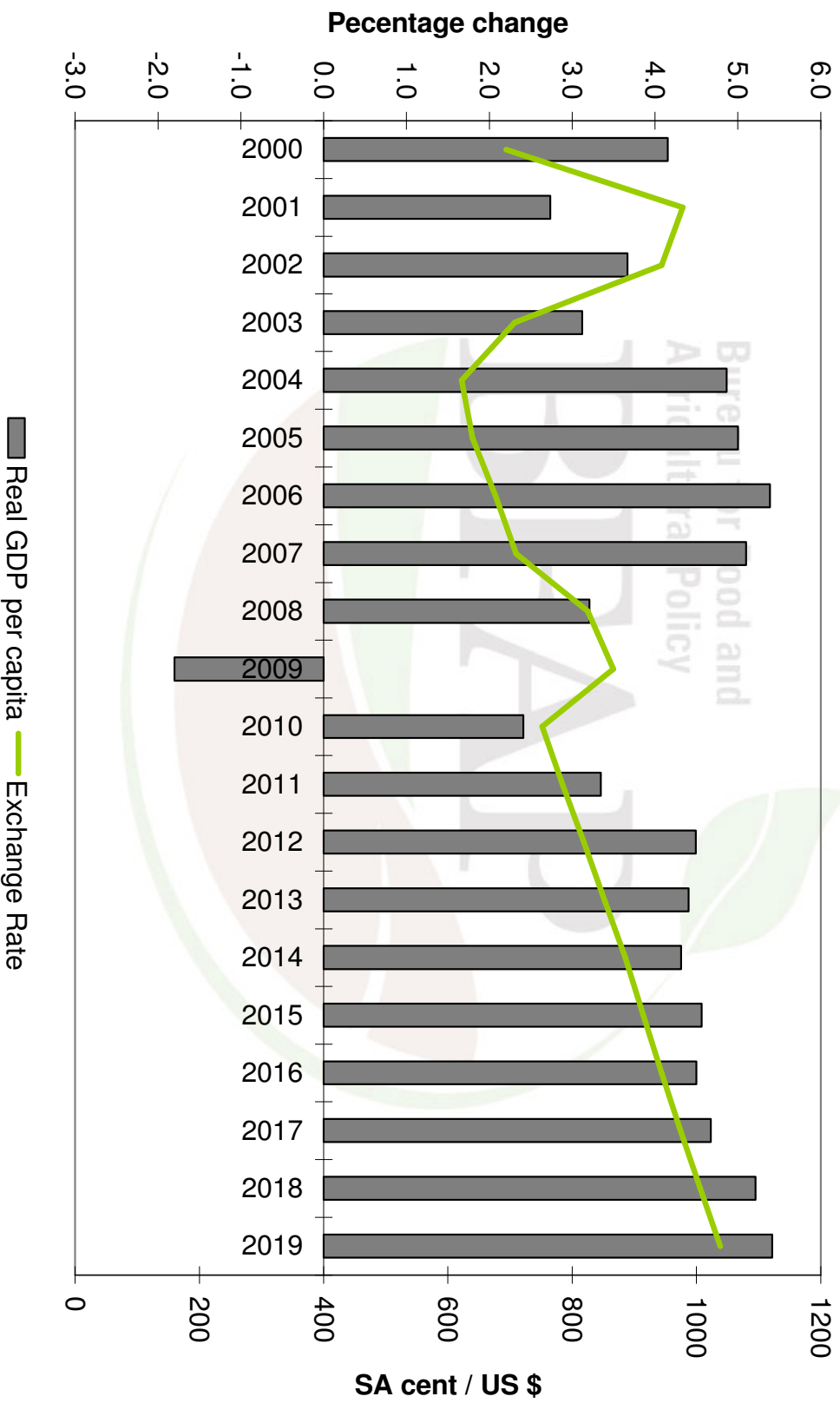
# Real Net Farming Income



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# Key Assumptions



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# Presentation Overview

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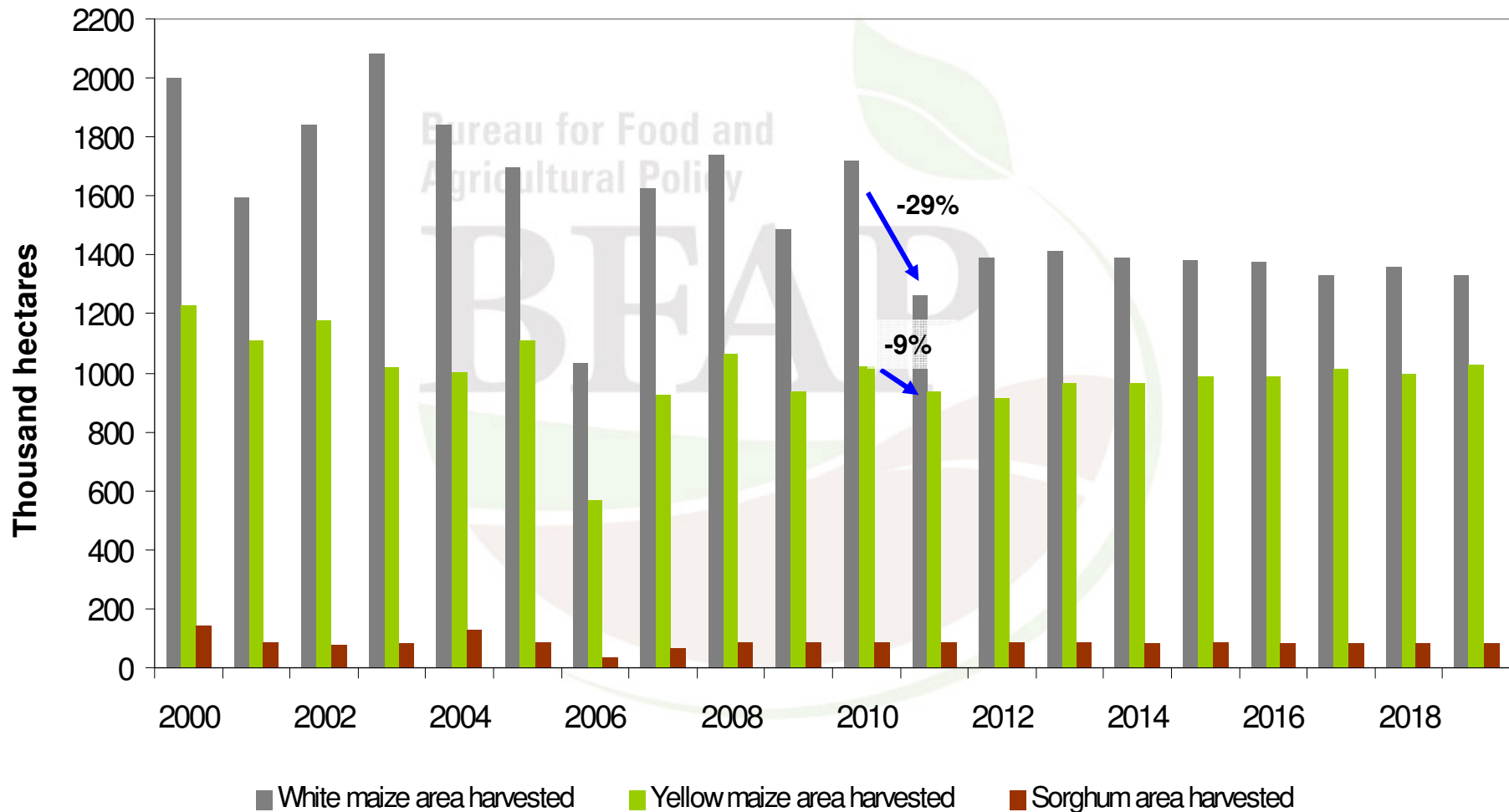
- Global outlook – FAPRI
- Market volatility - FAO
- SA commodity markets - BFAP
- Consumer economics and trends – BFAP
- Impacts on typical farms - BFAP
- Benchmarking – *agri-benchmark*
- Regional outlook – BFAP



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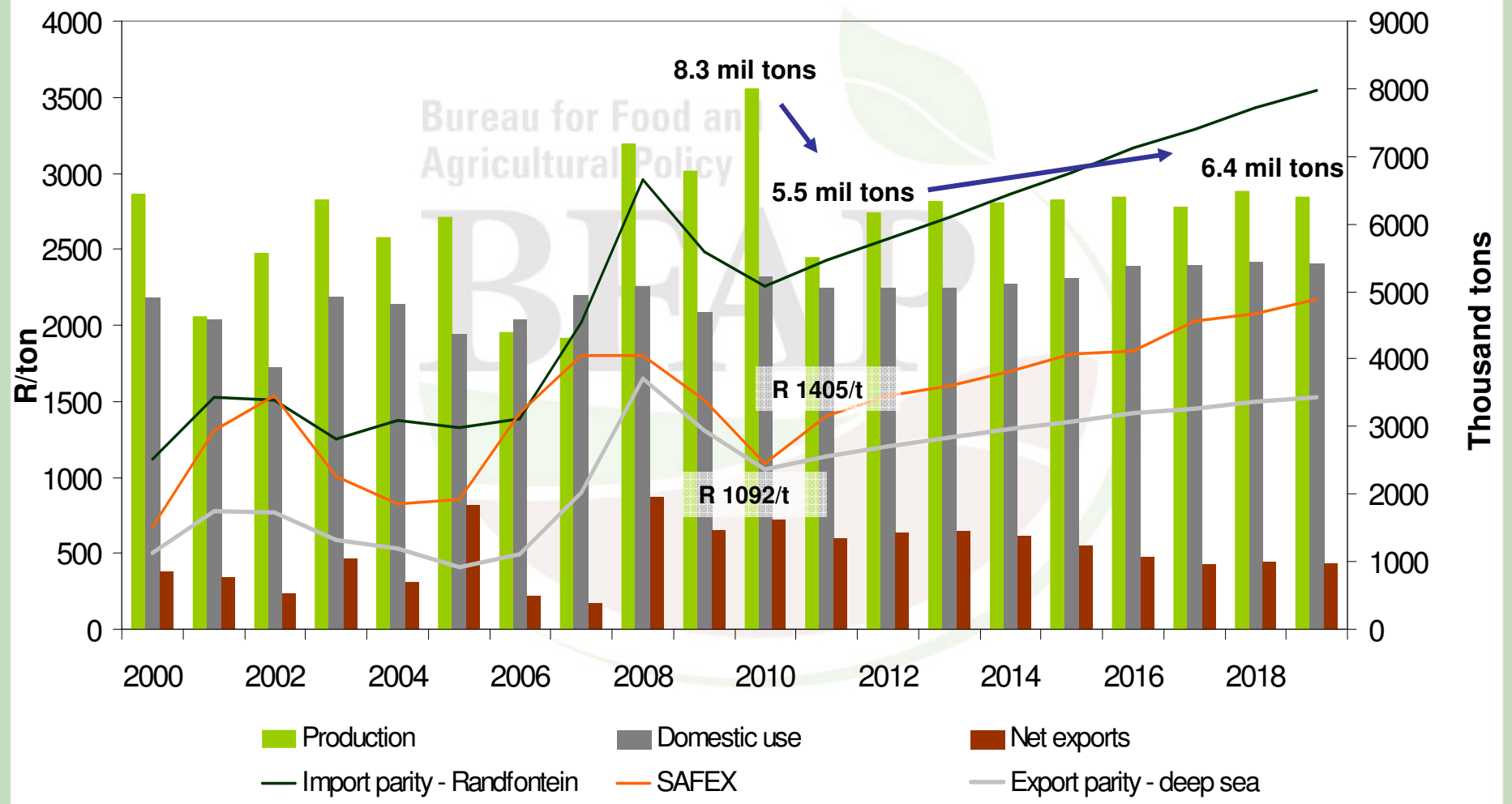
# Summer Grains: Area harvested



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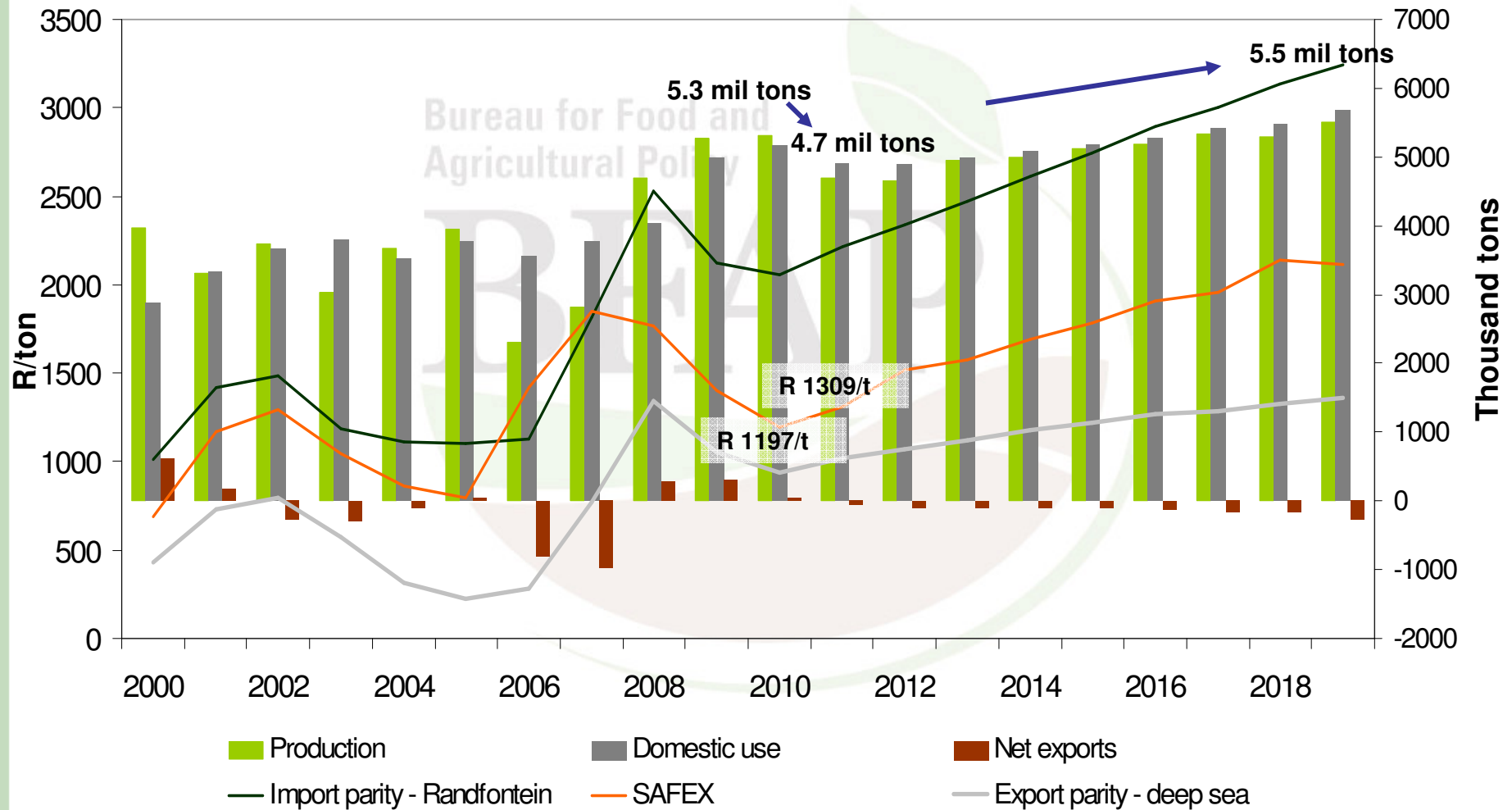
# White Maize : Production, consumption, trade and prices



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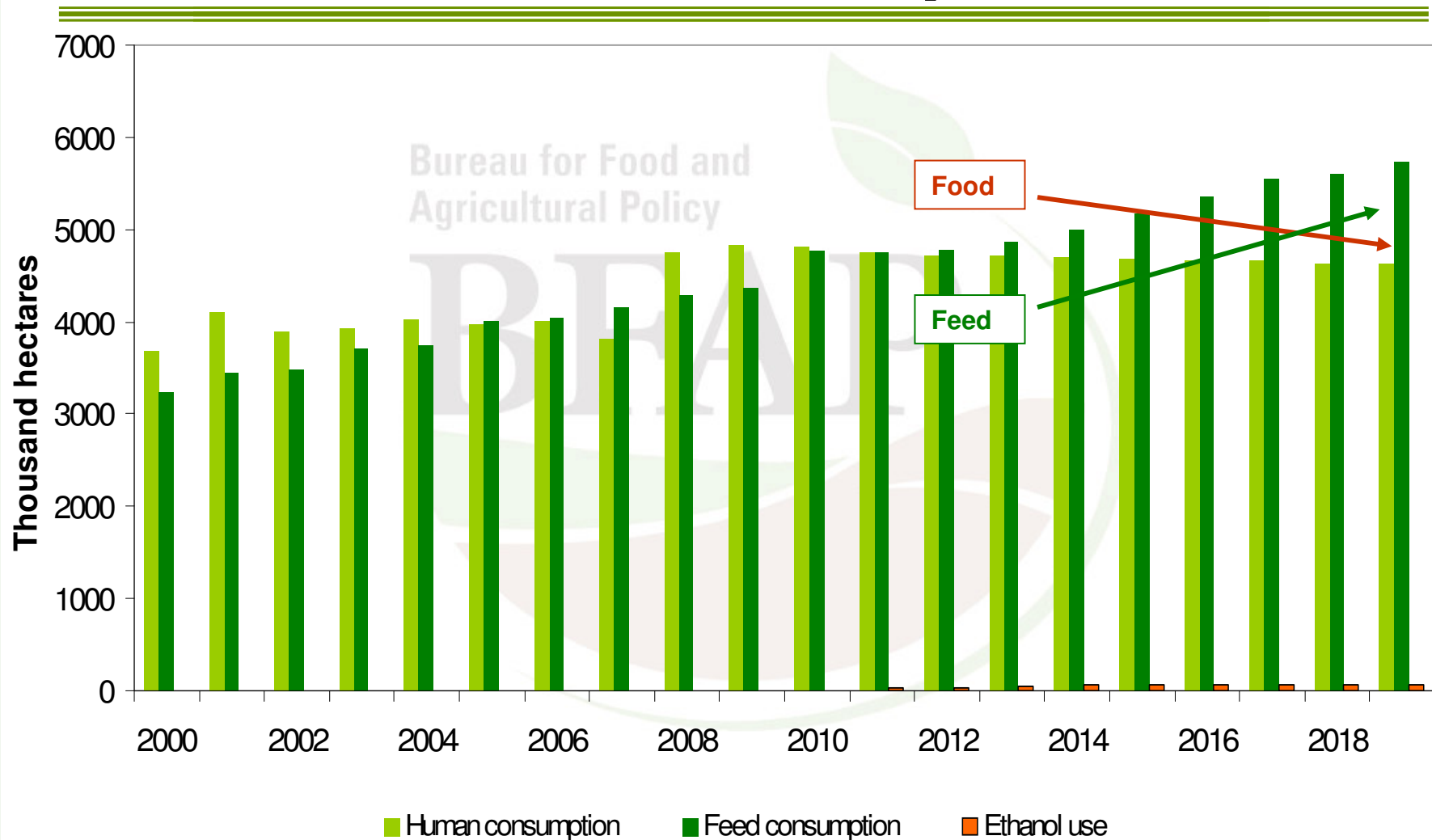
# Yellow Maize : Production, consumption, trade and prices



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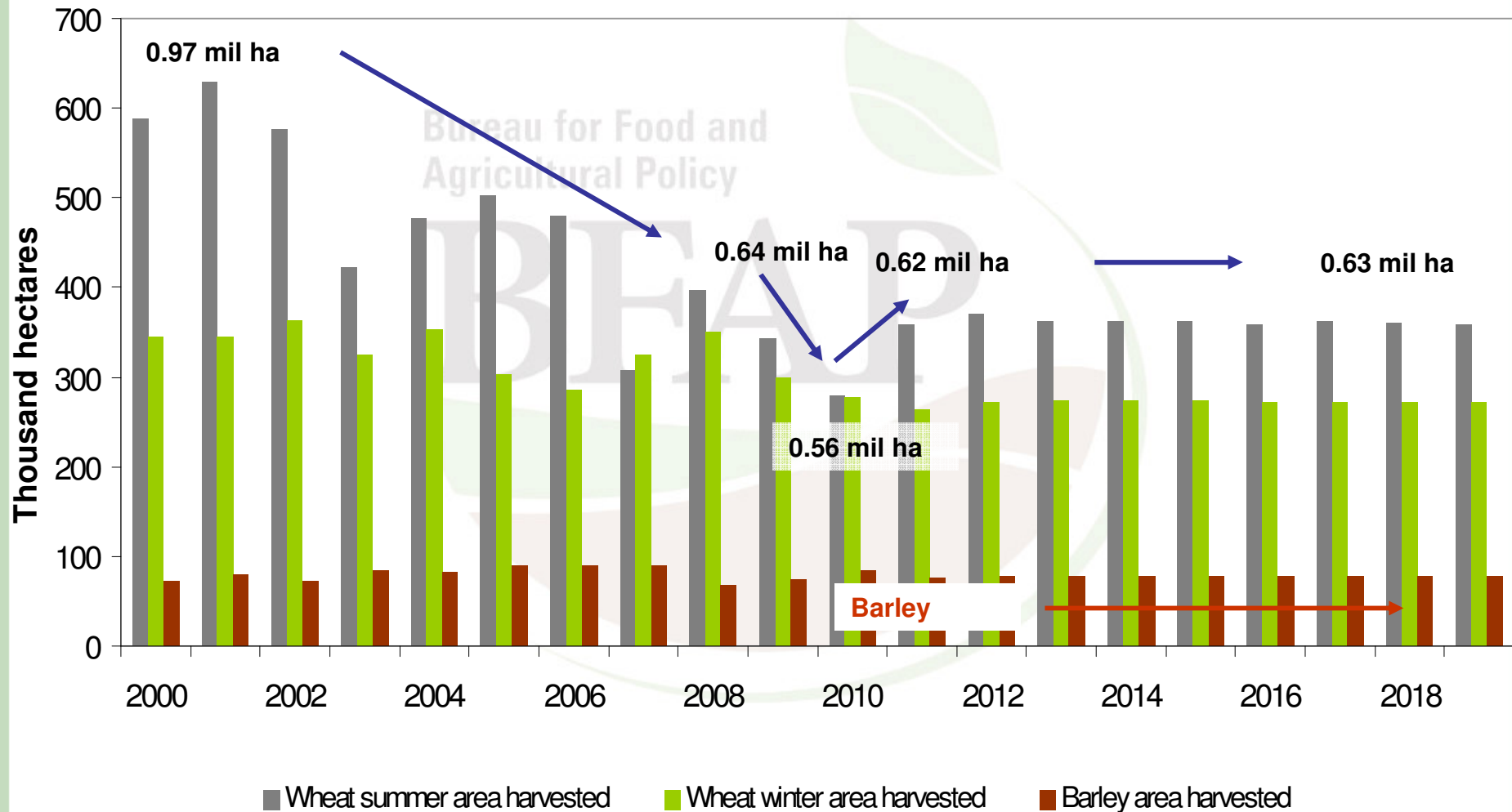
# Maize Consumption



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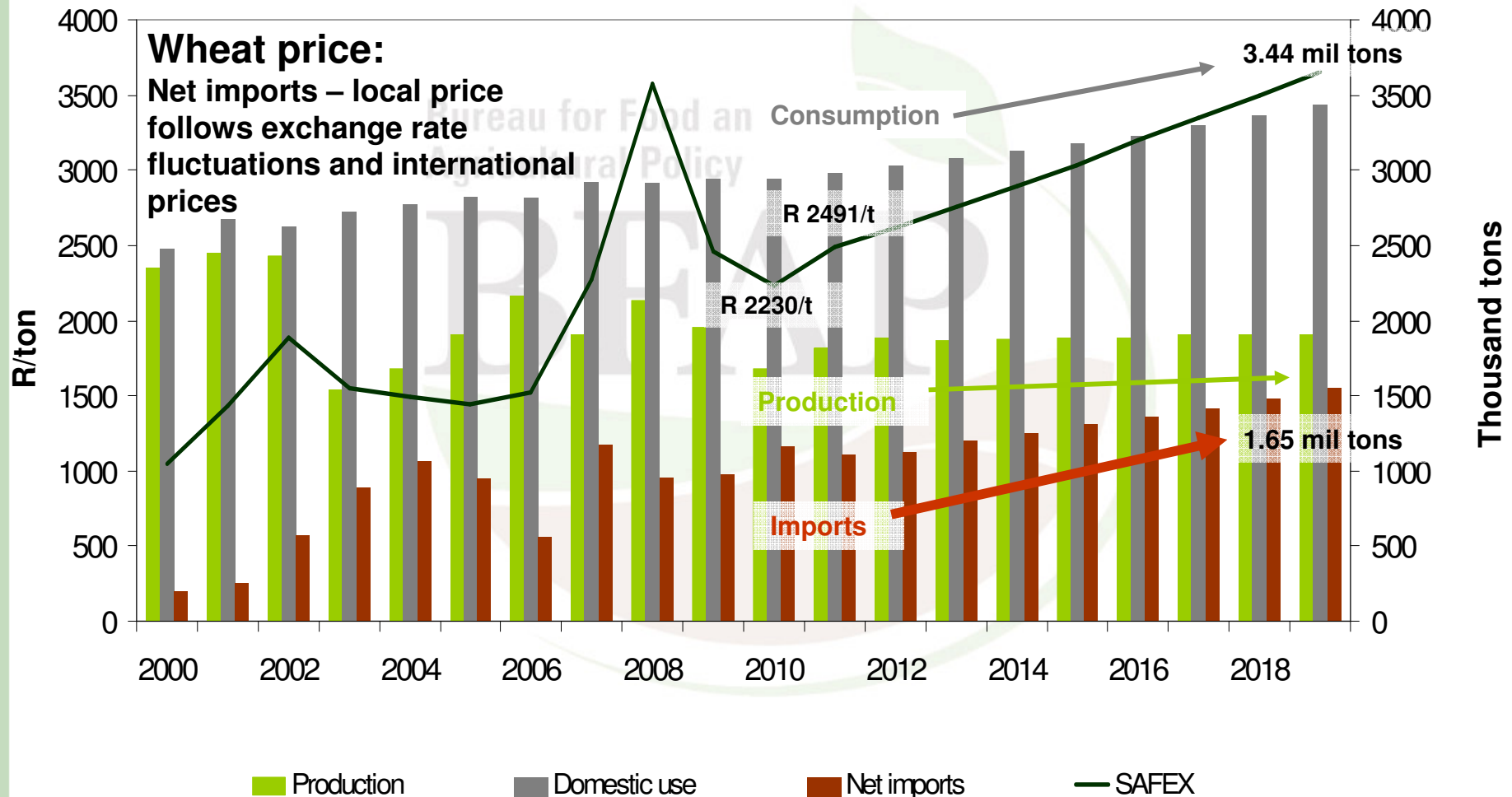
# Winter Grains: Area harvested



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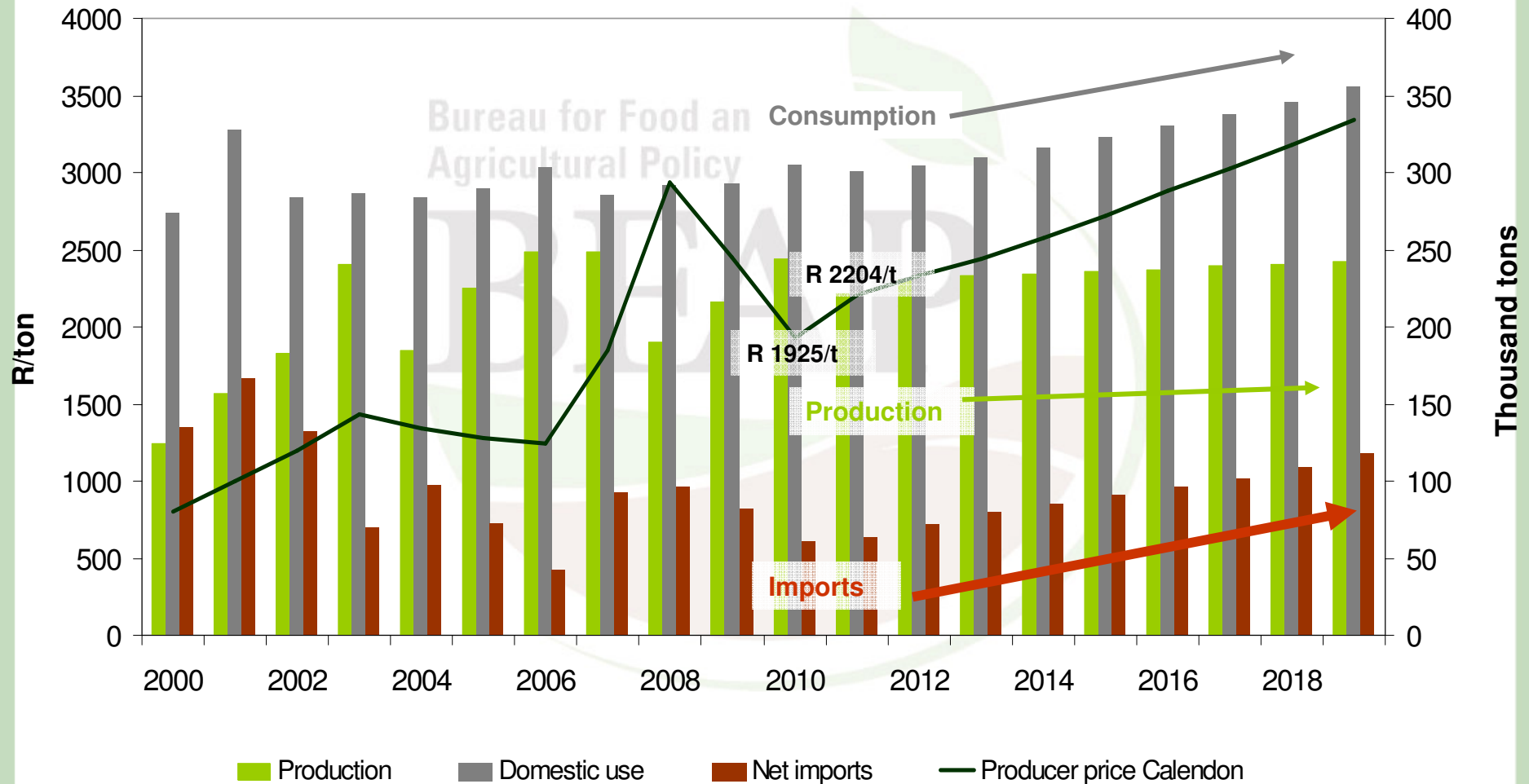
# Wheat : Production, consumption, trade and prices



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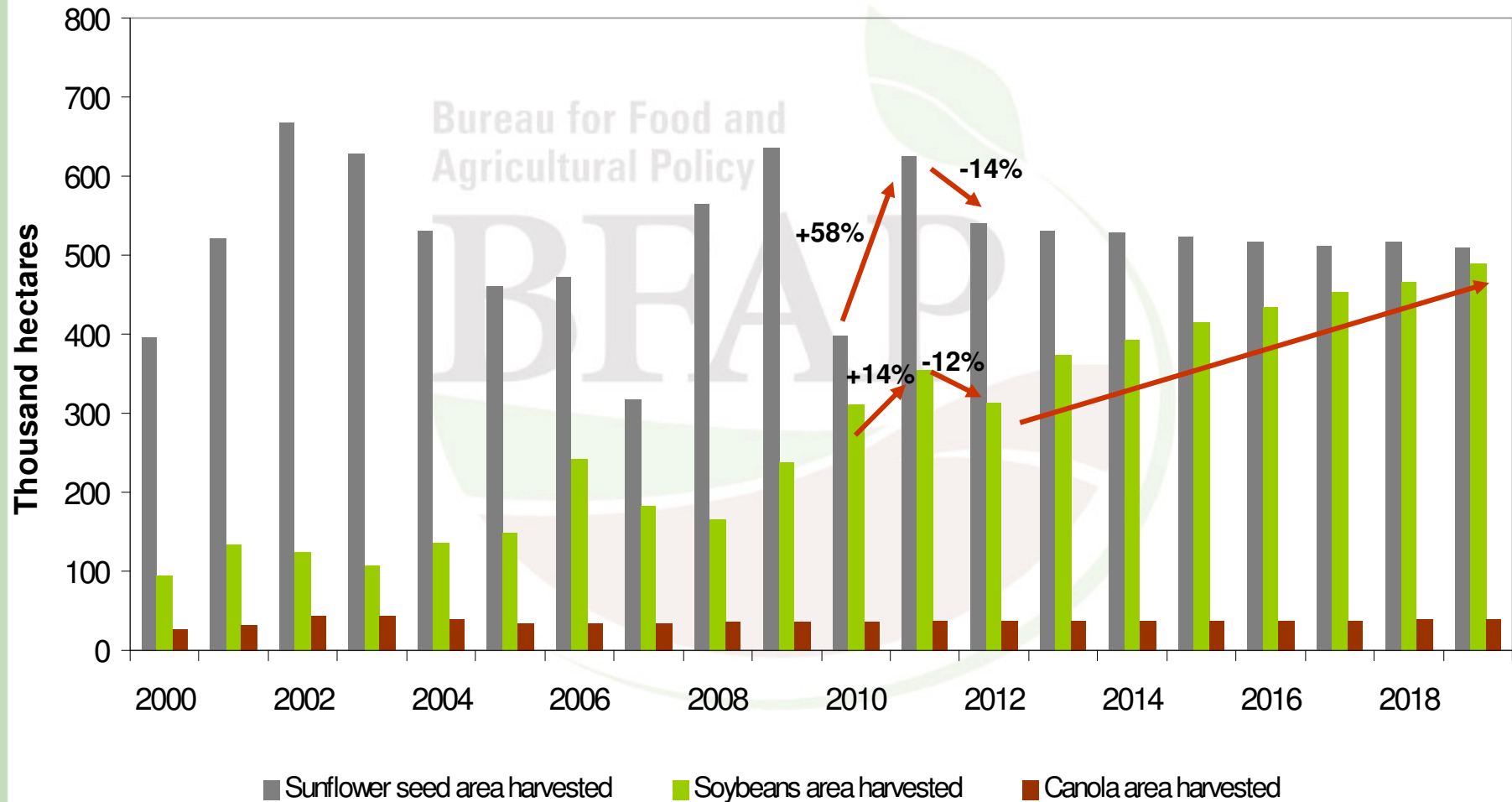
# Barley: Production, consumption, trade and prices



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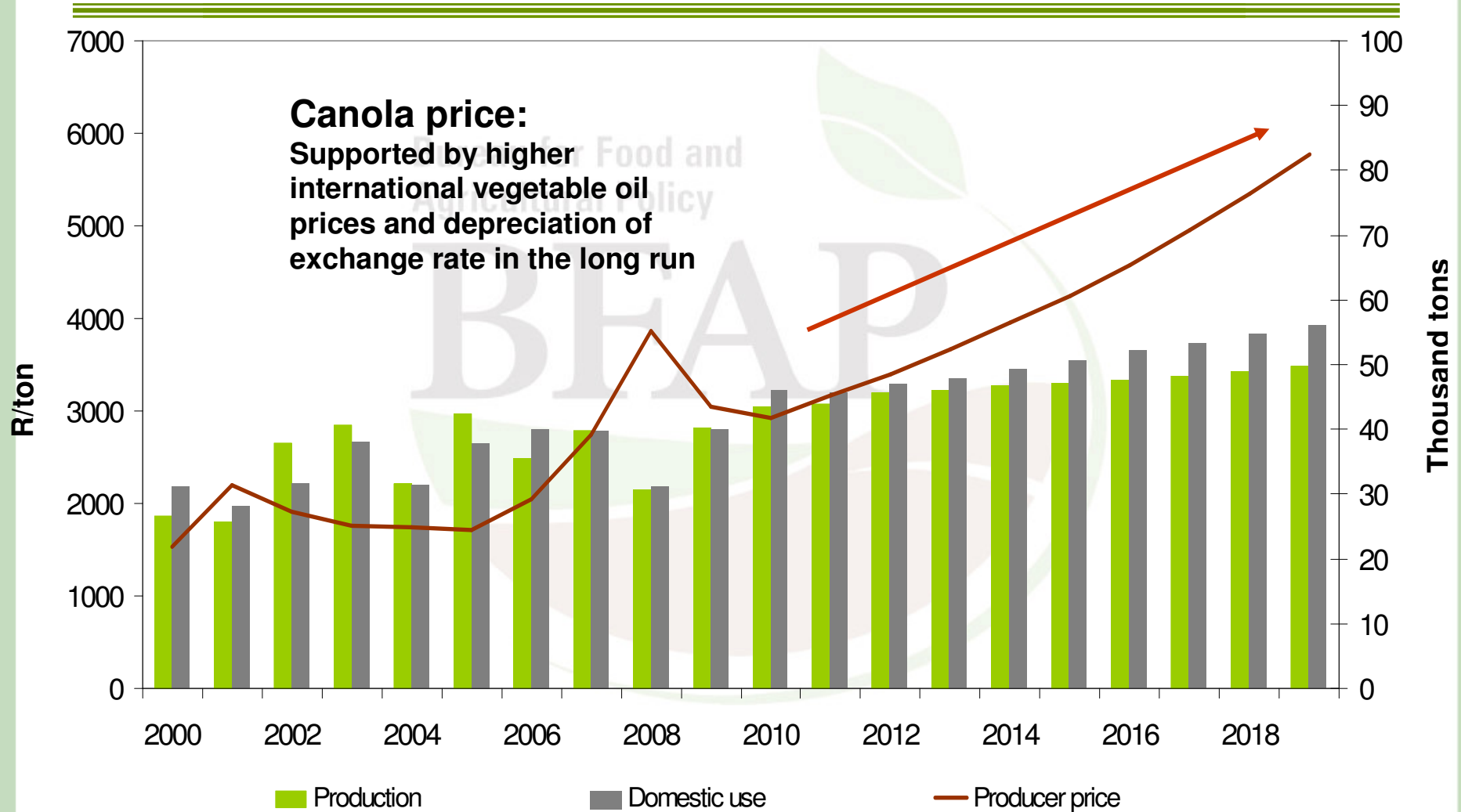
# Oilseeds: Area harvested



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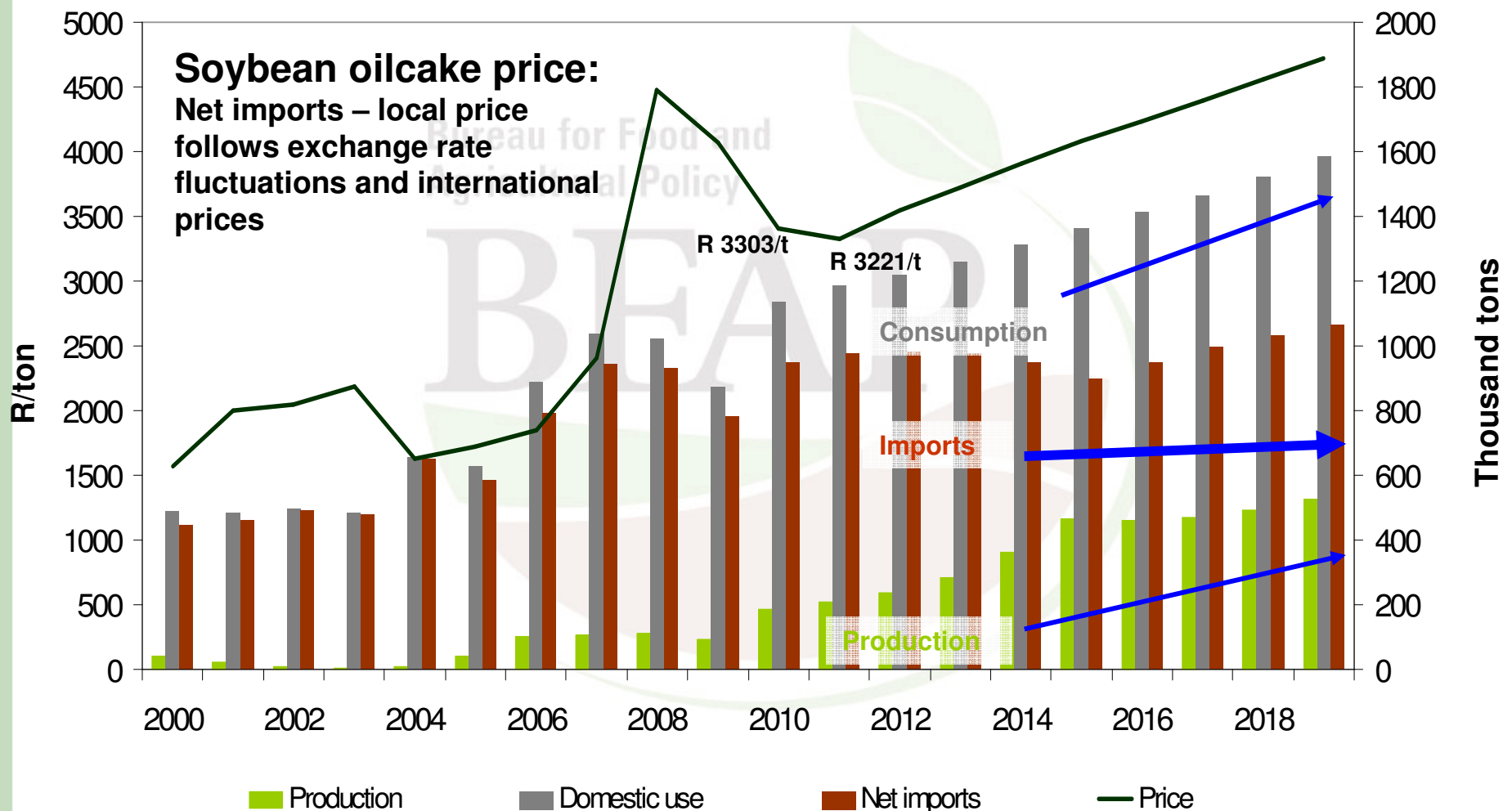
# Canola: Production, consumption and prices



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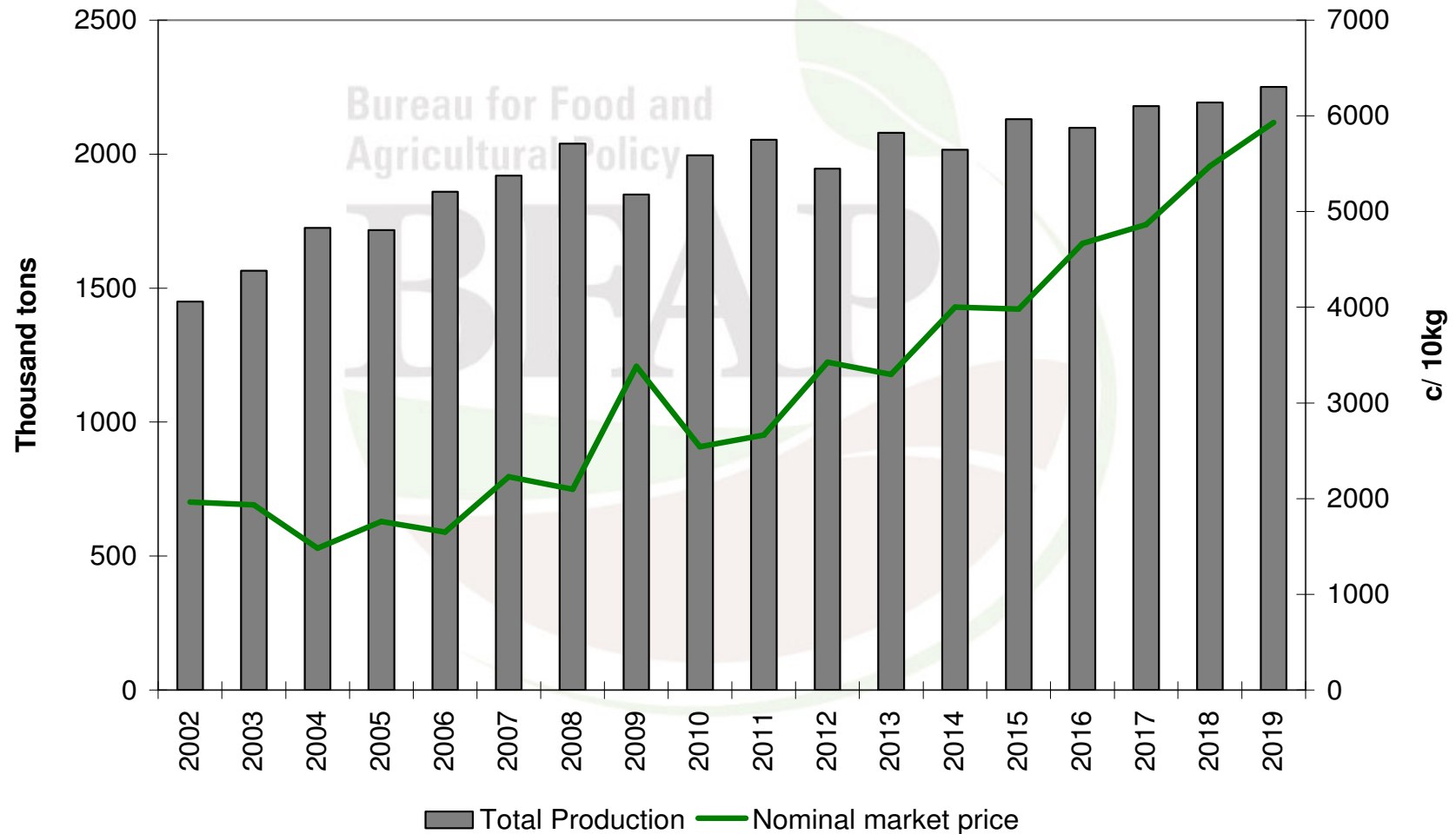
# Soybean oilcake : Production, consumption, trade and prices



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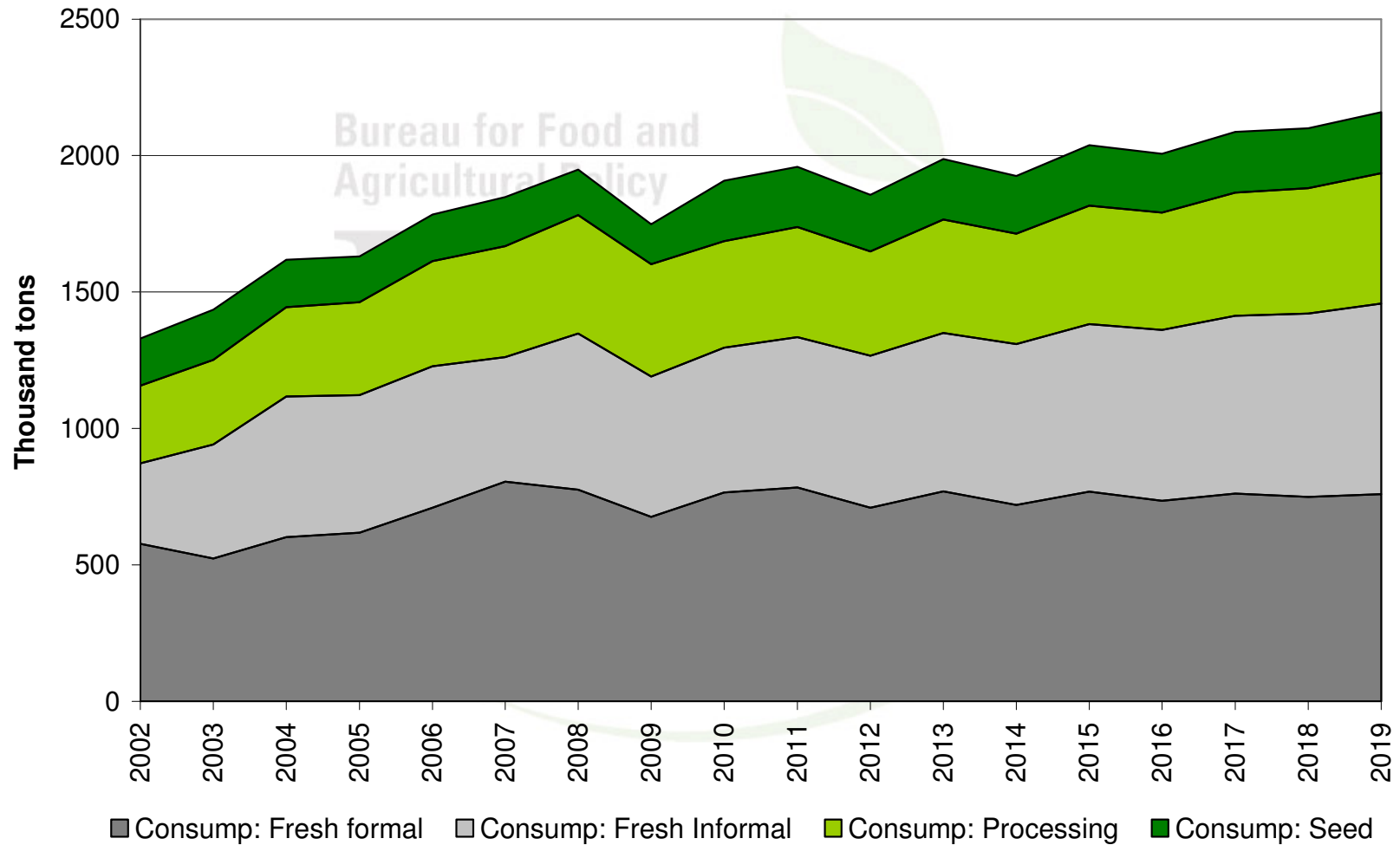
# Potatoes



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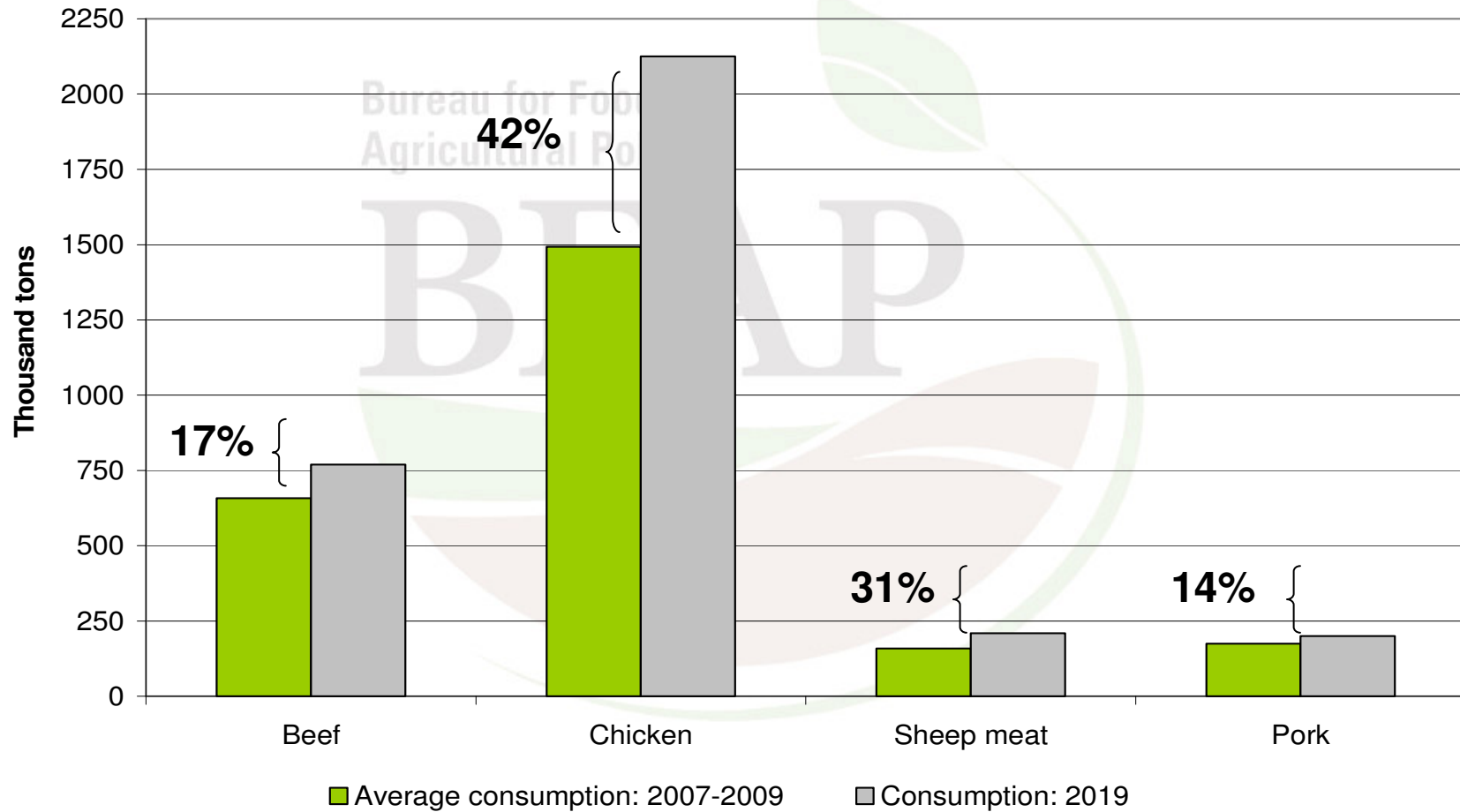
# Potatoes



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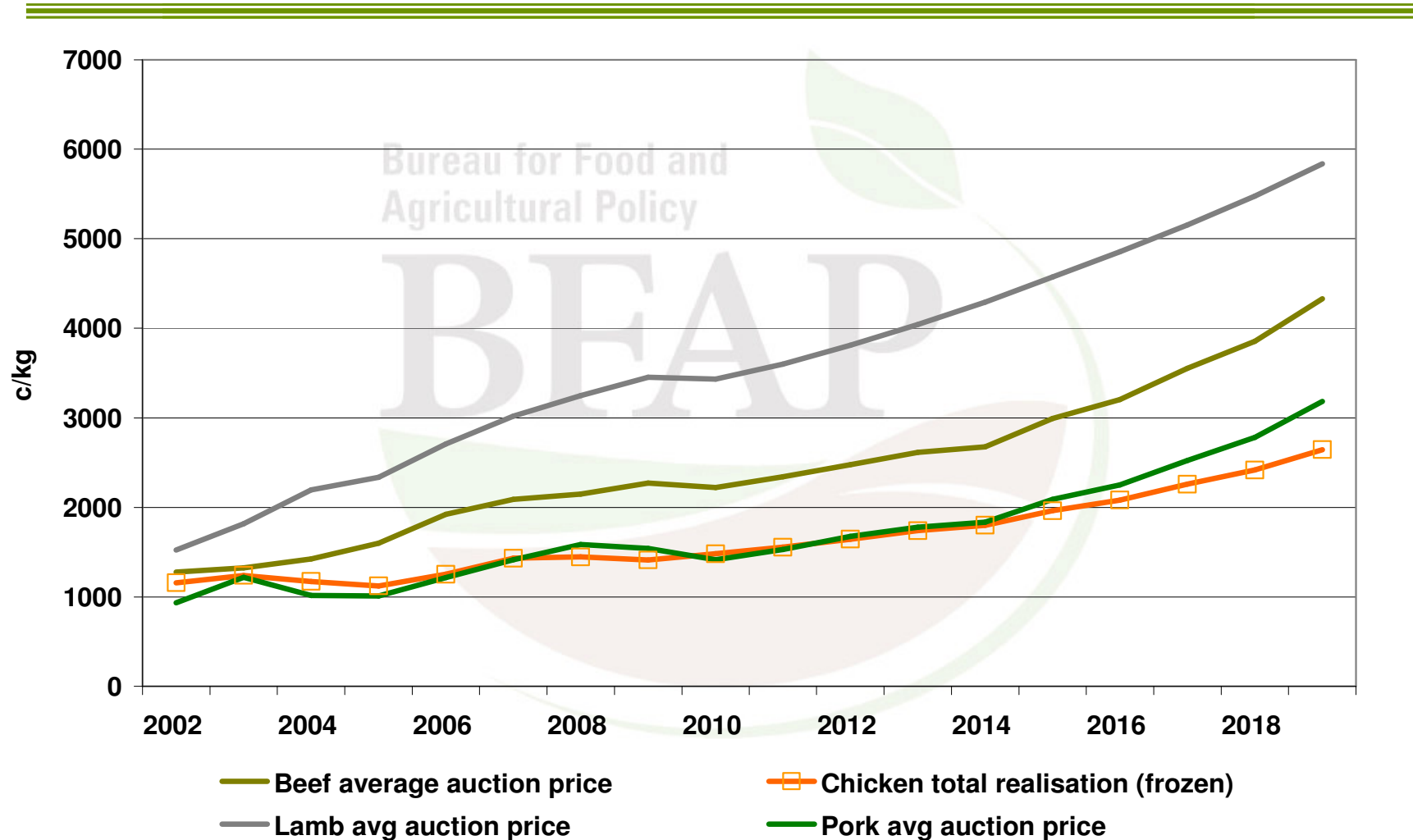
# SA Meat Market



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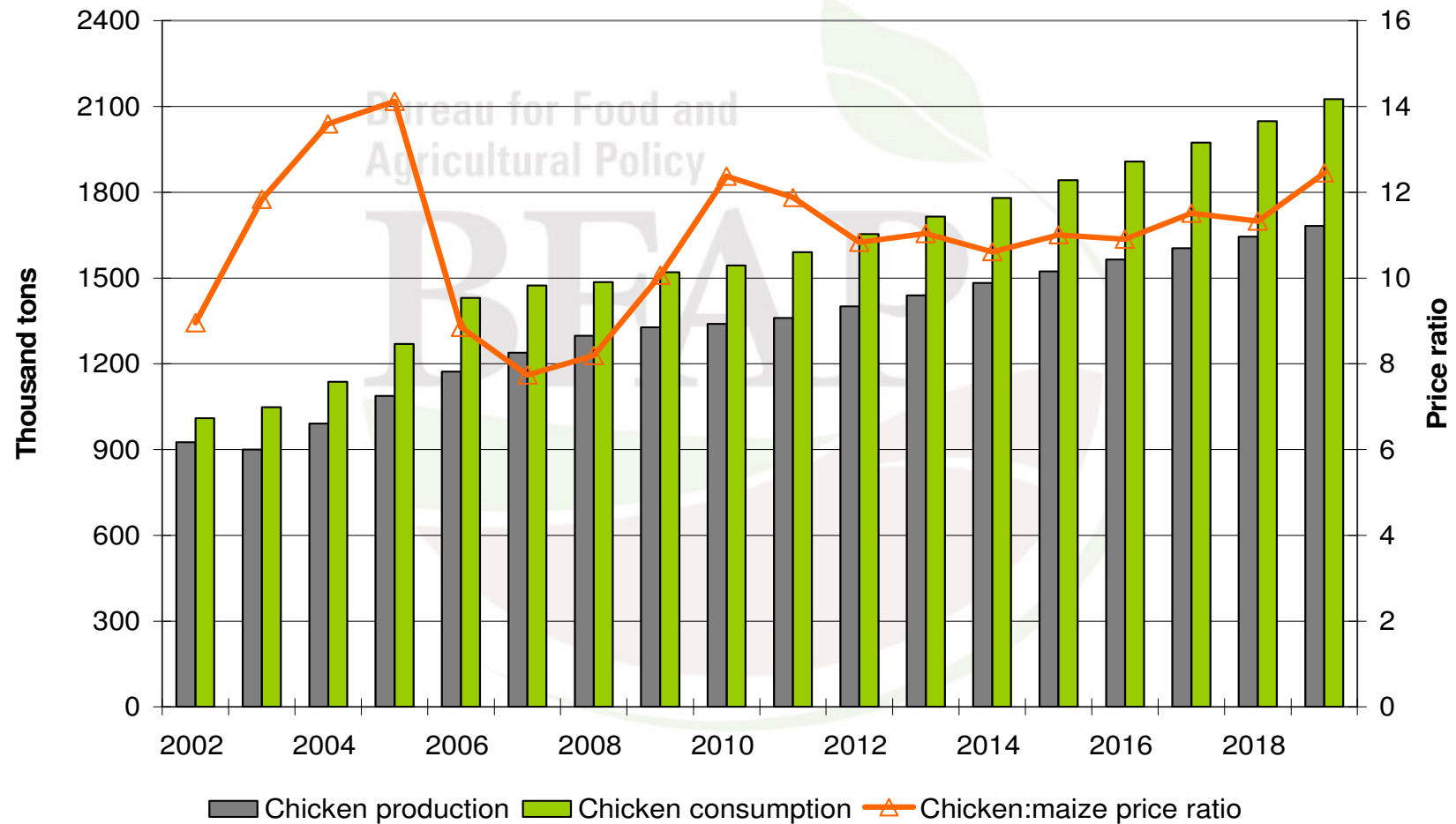
# Meat Prices



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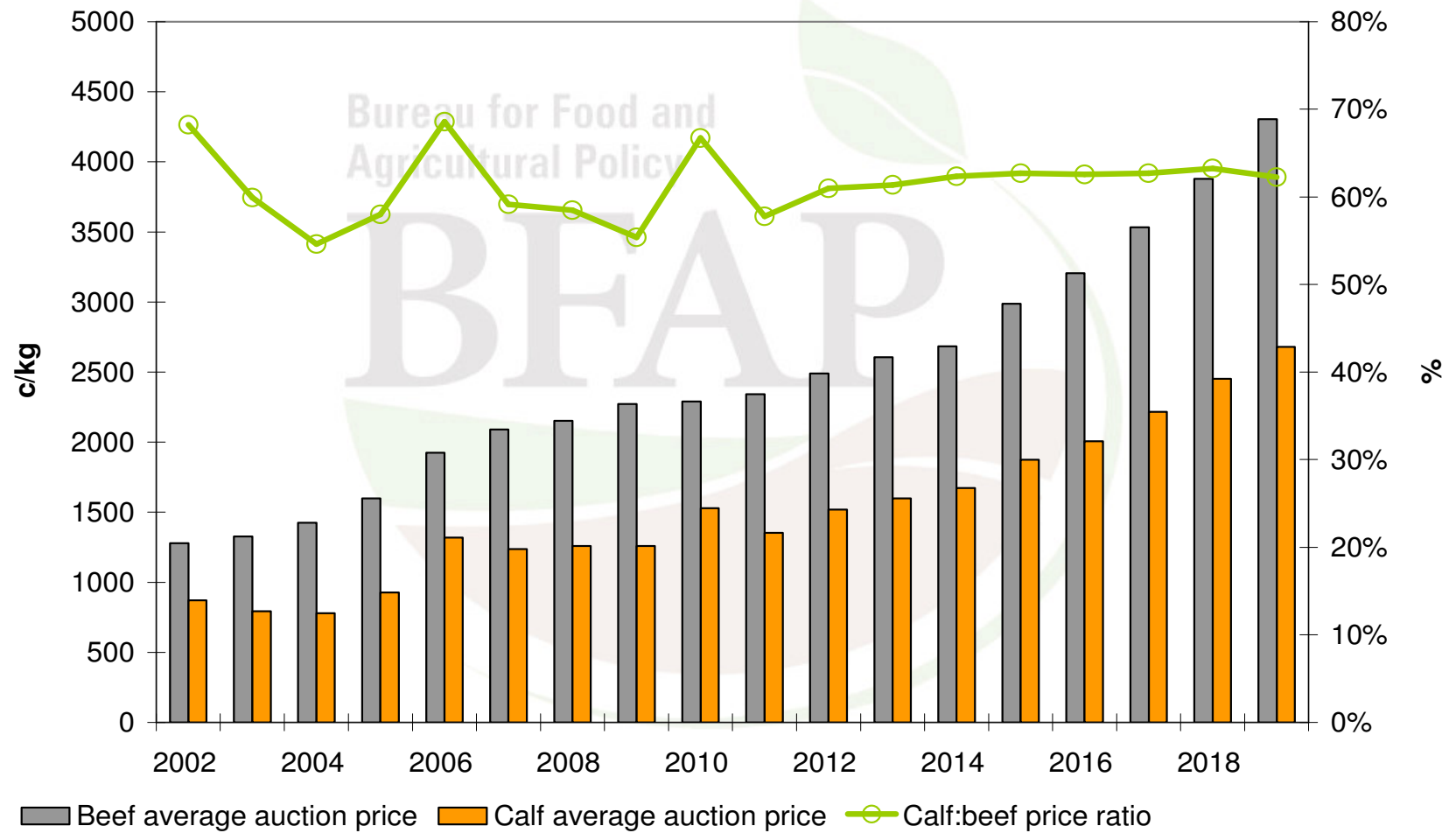
# Chicken Meat



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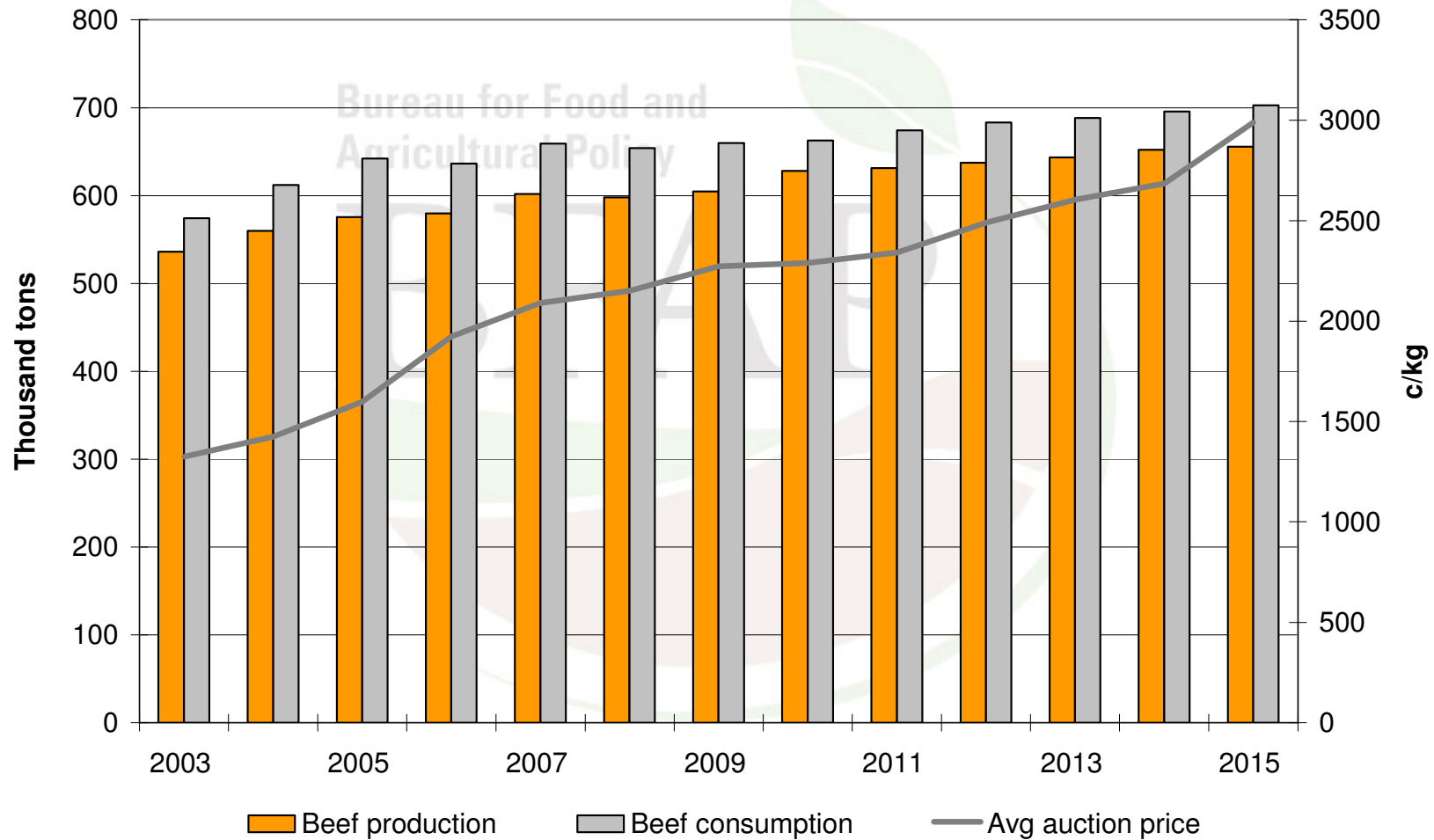
# Feedlot Economics



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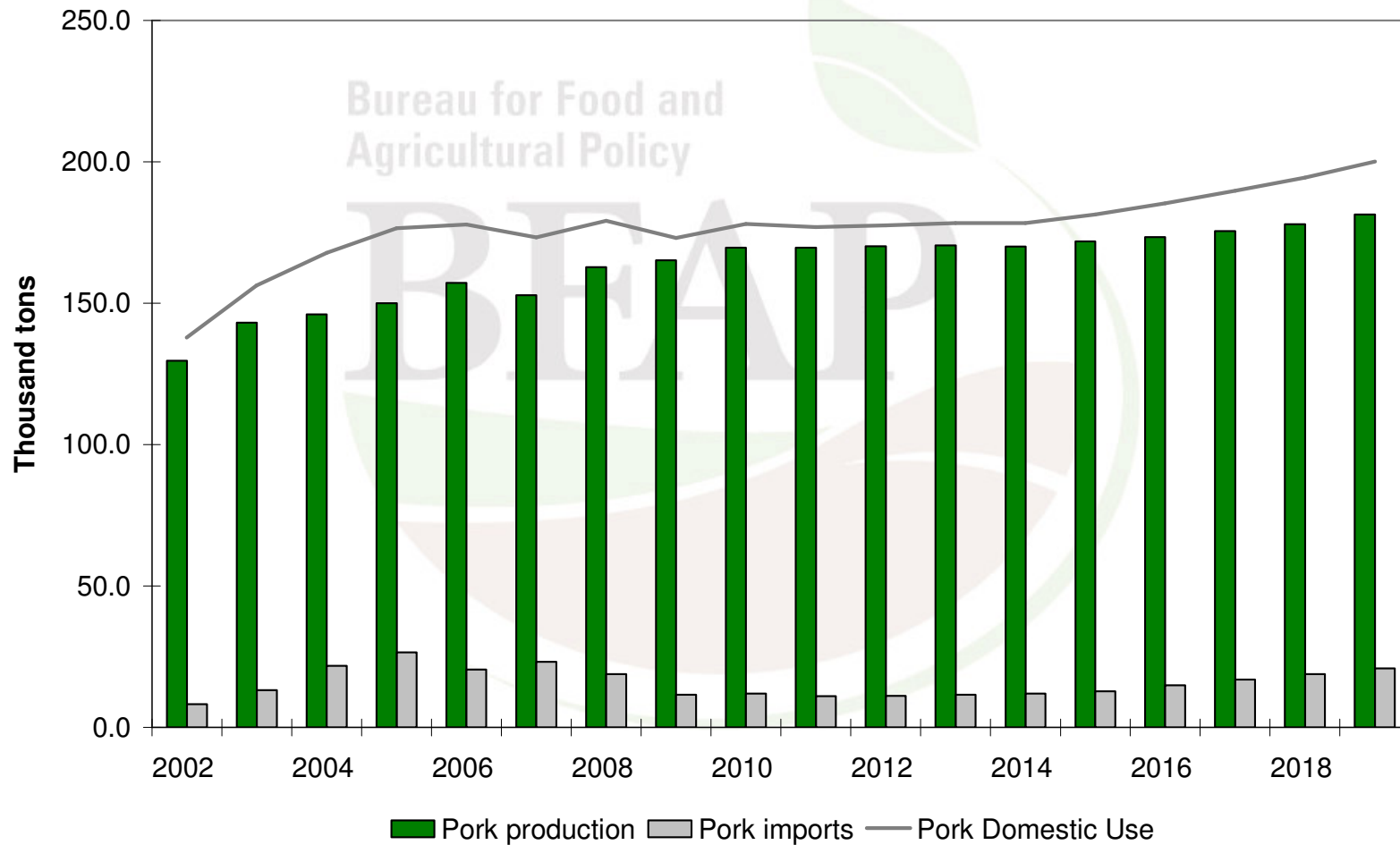
# Beef



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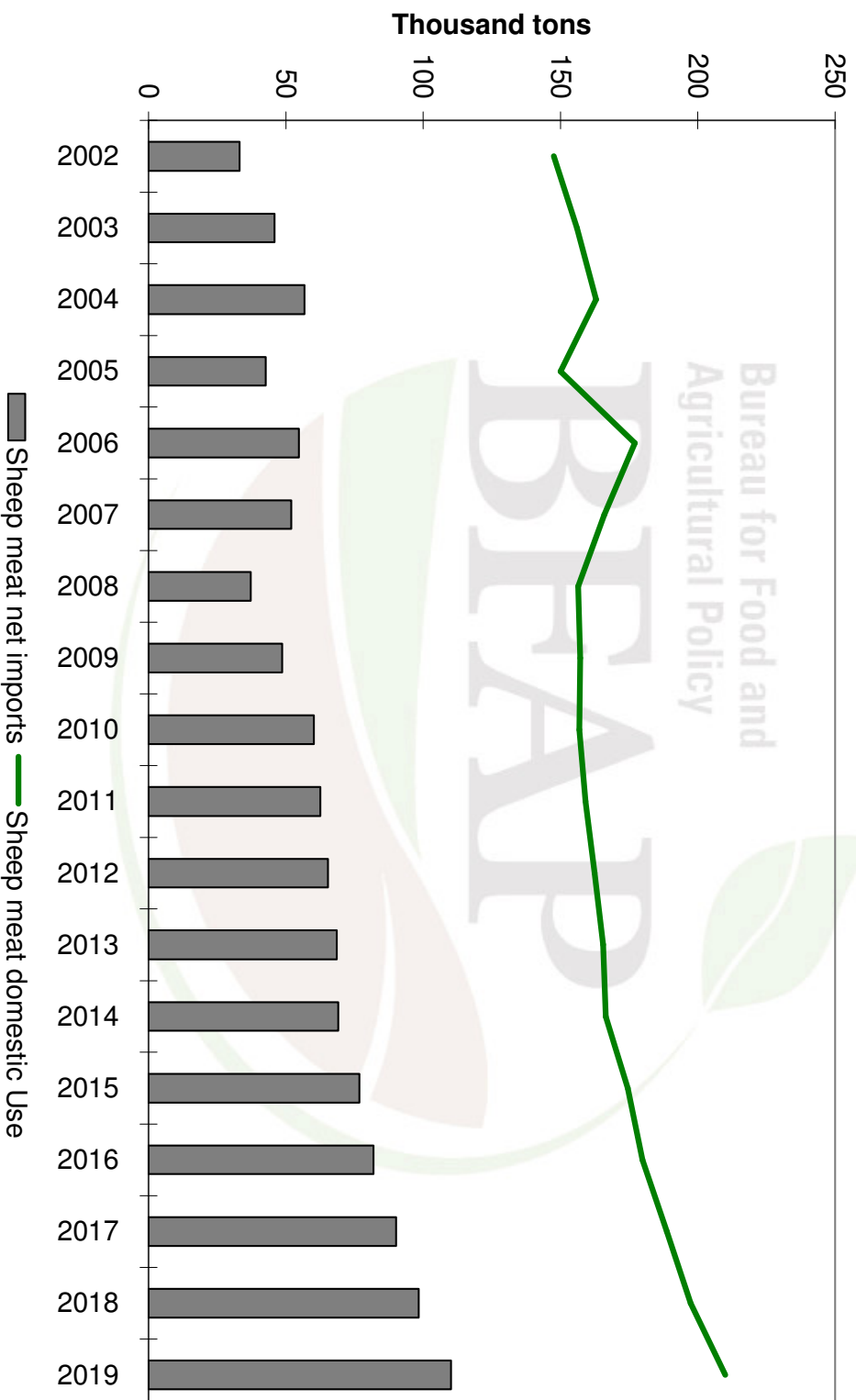
# Pork



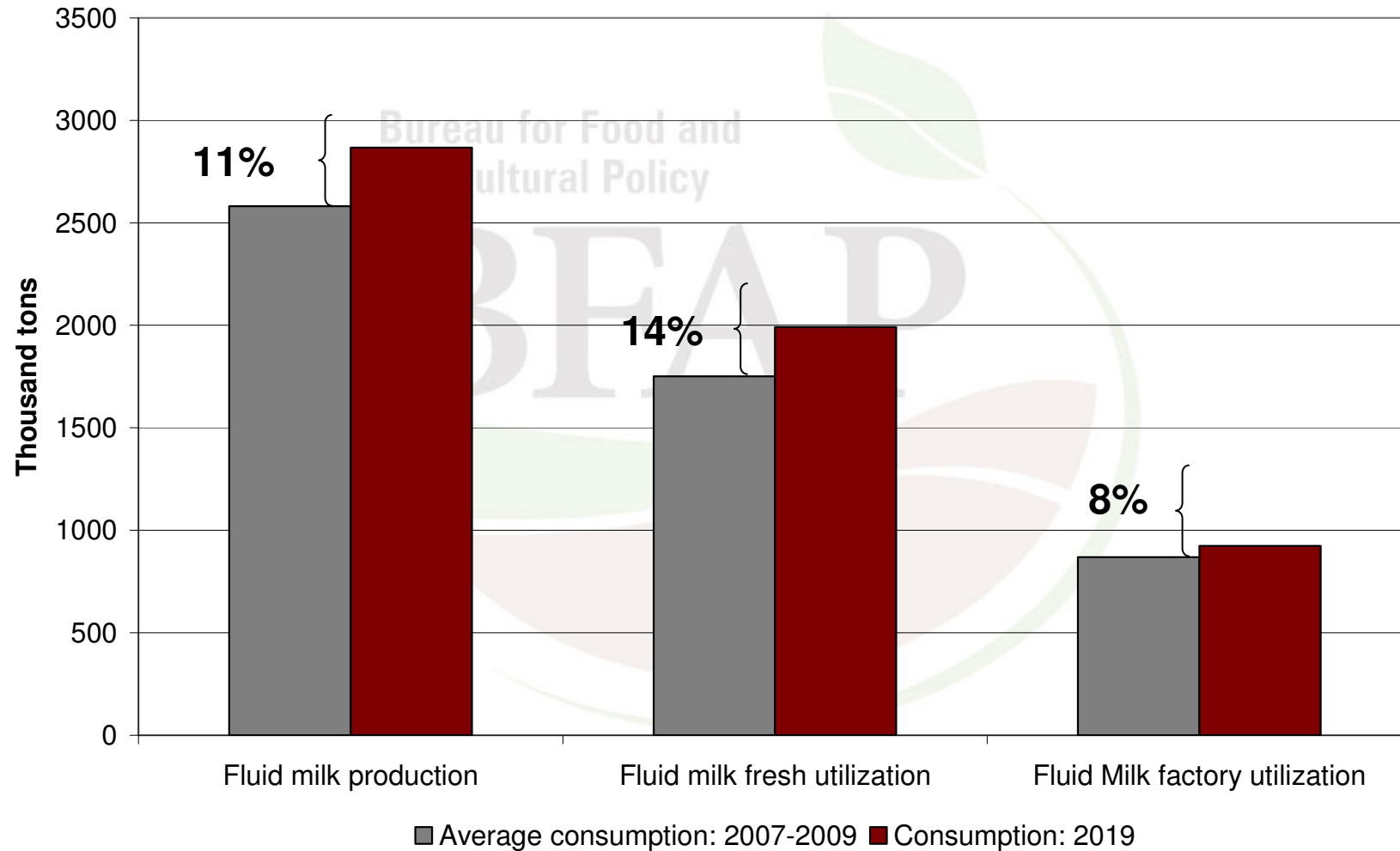
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# Sheep meat



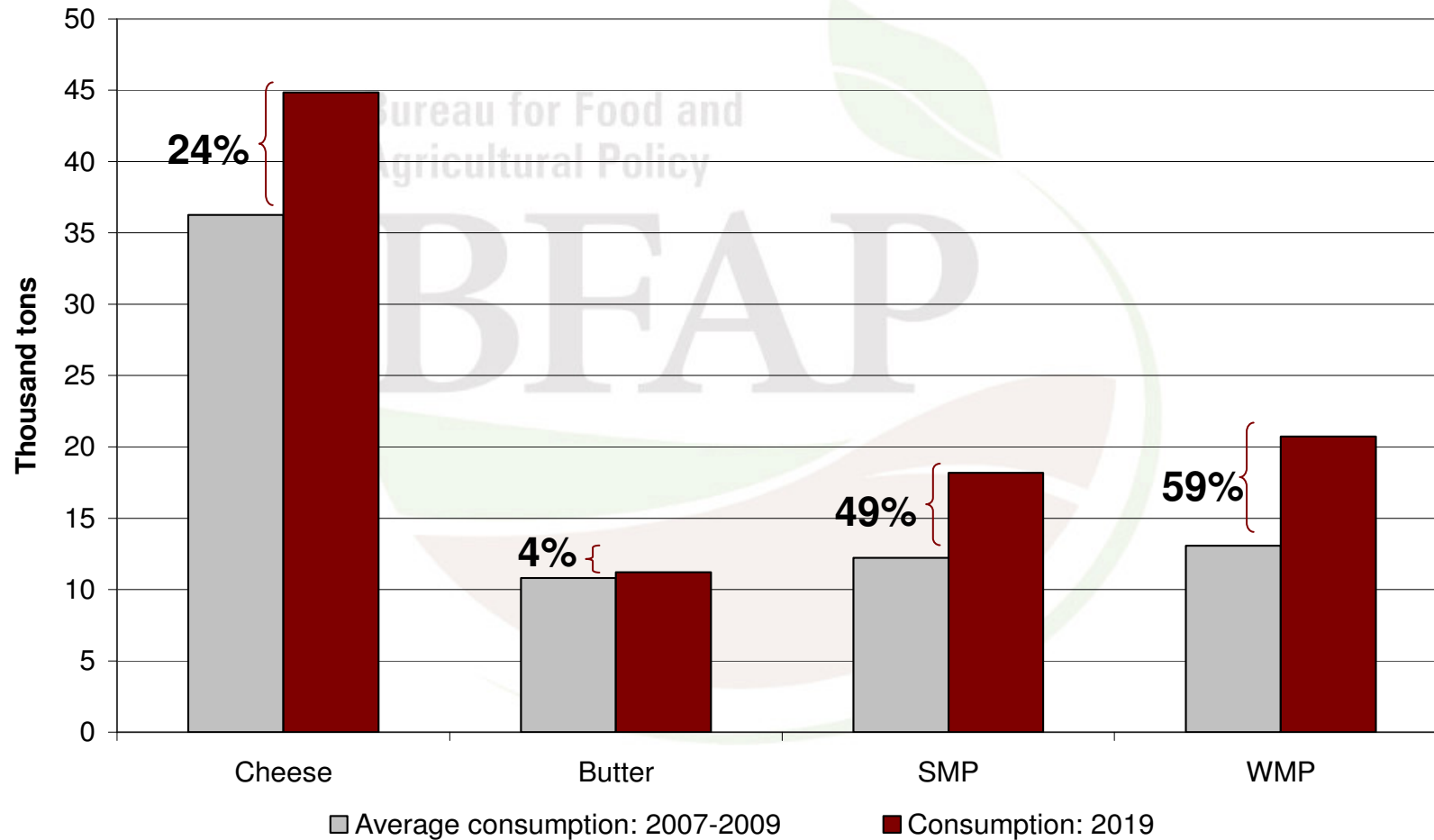
# Fluid Milk



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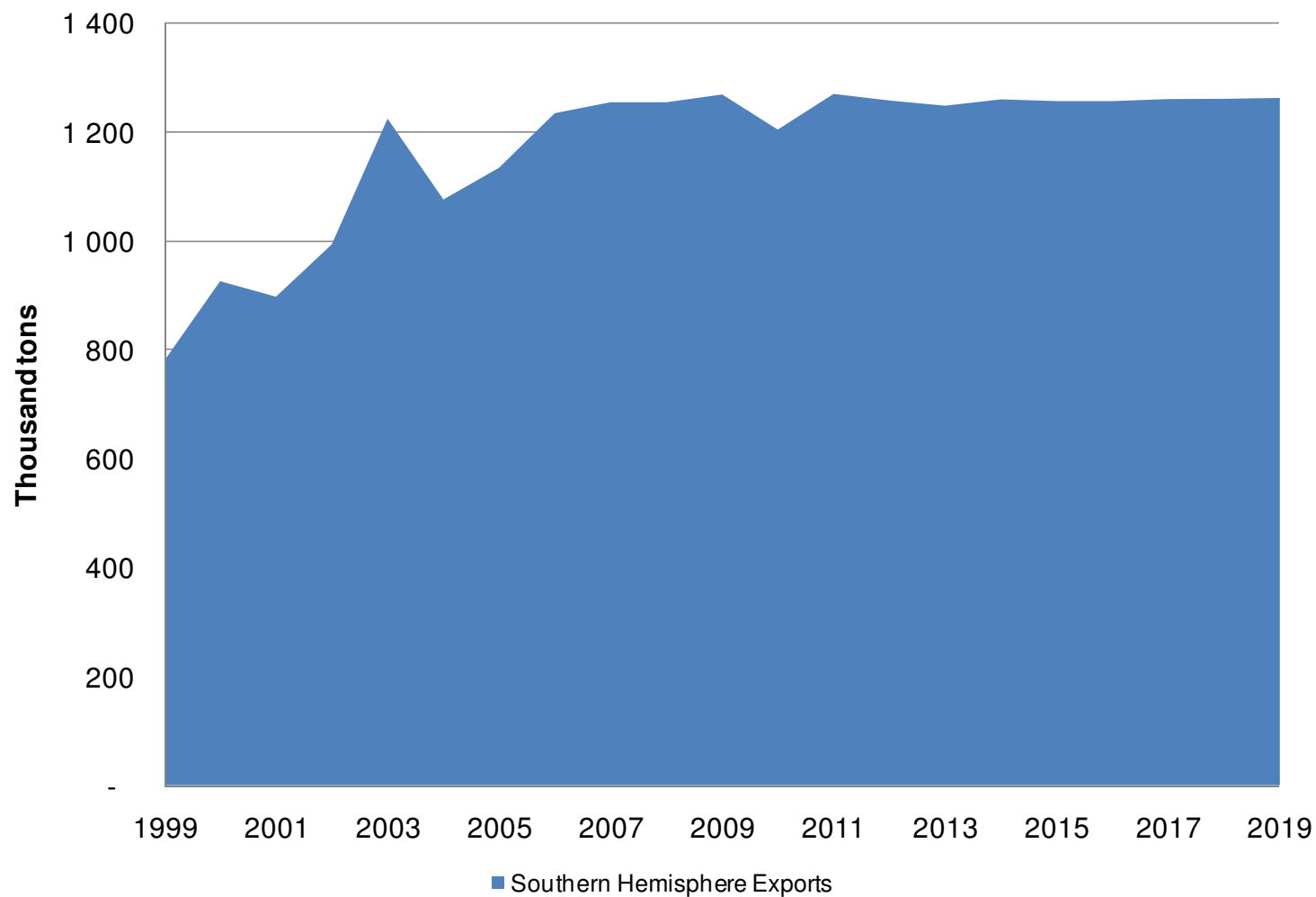
# Dairy Products



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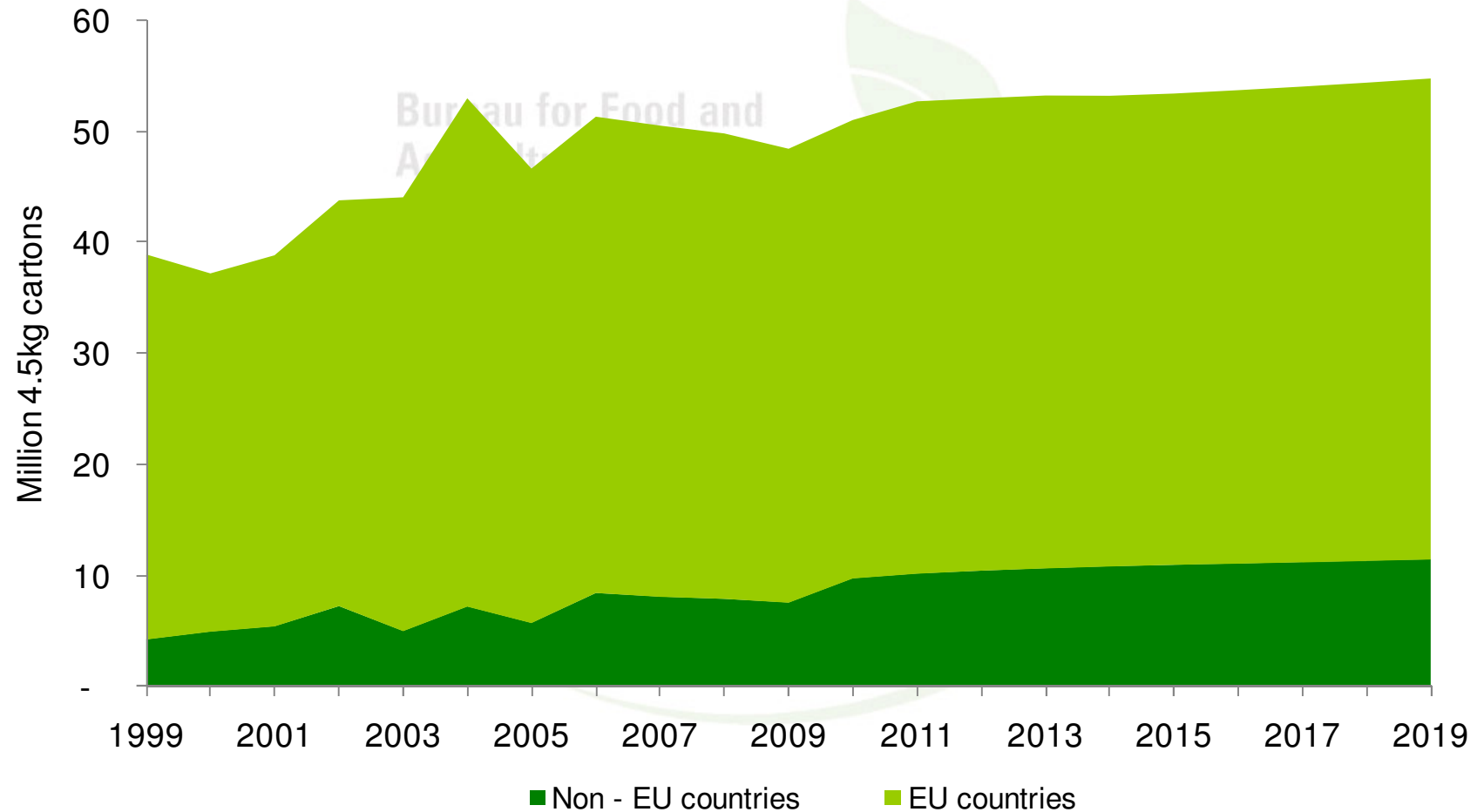
# Table Grapes – SH Exports



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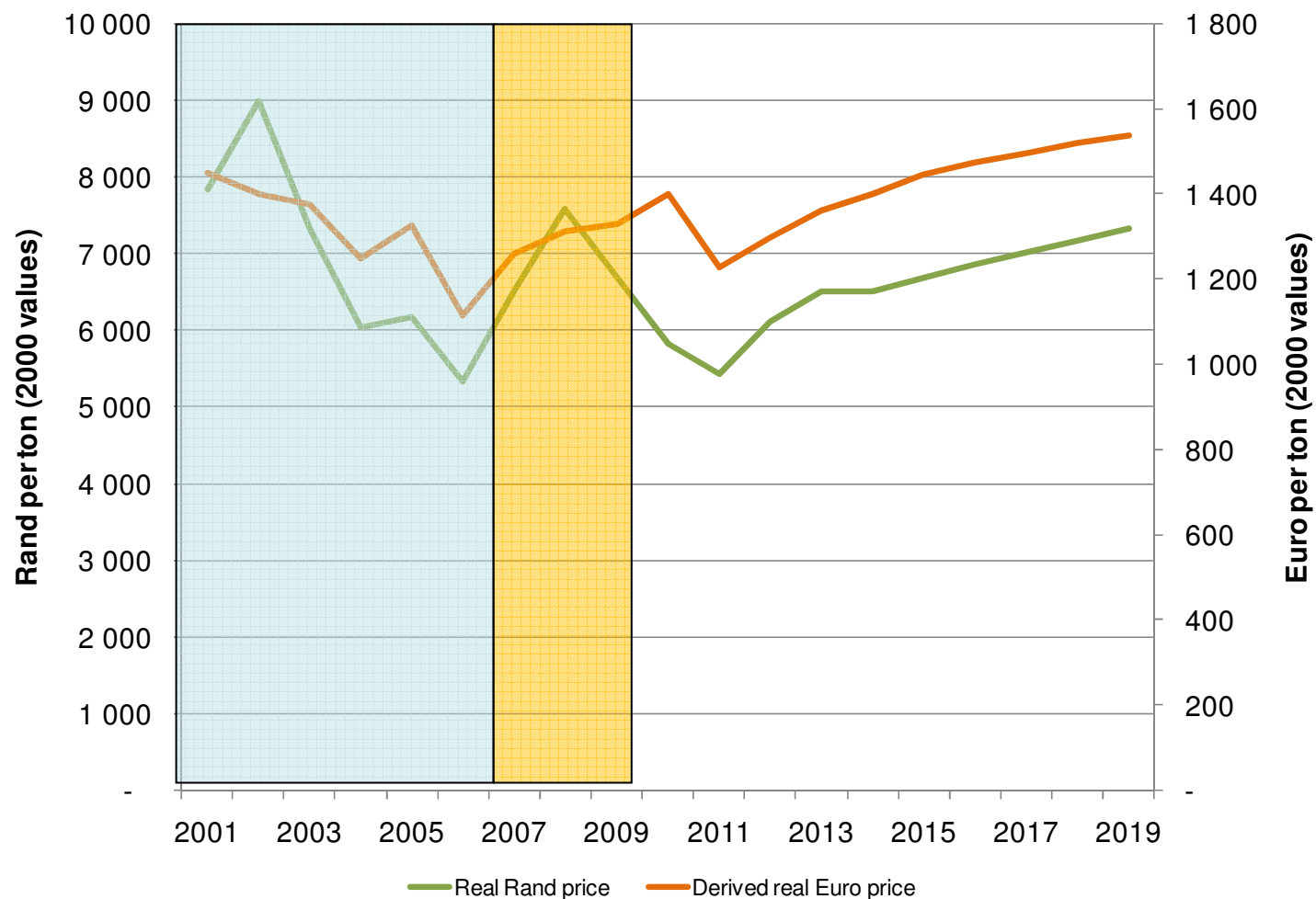
# Table grapes – SA Exports



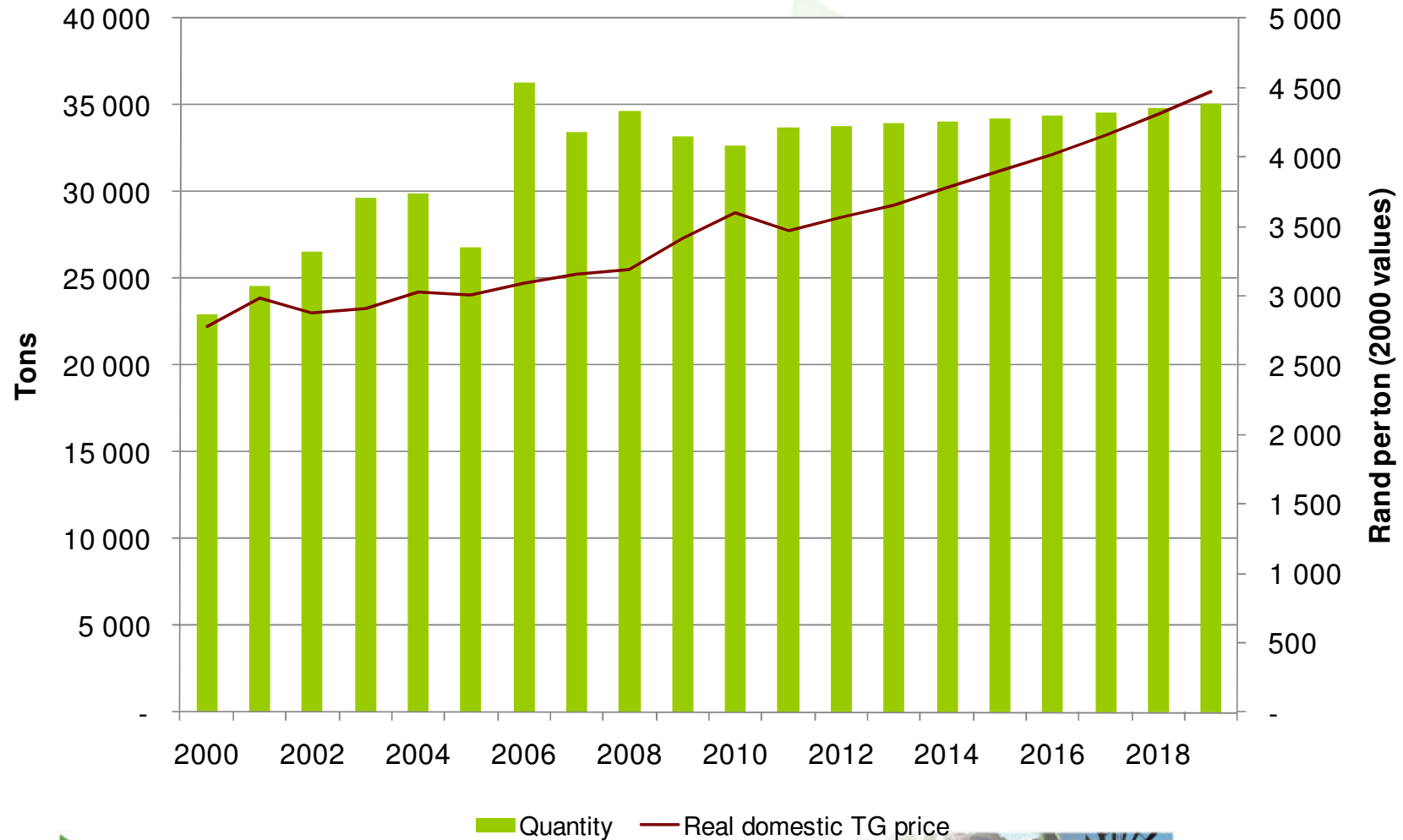
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# Table Grapes – Export Price



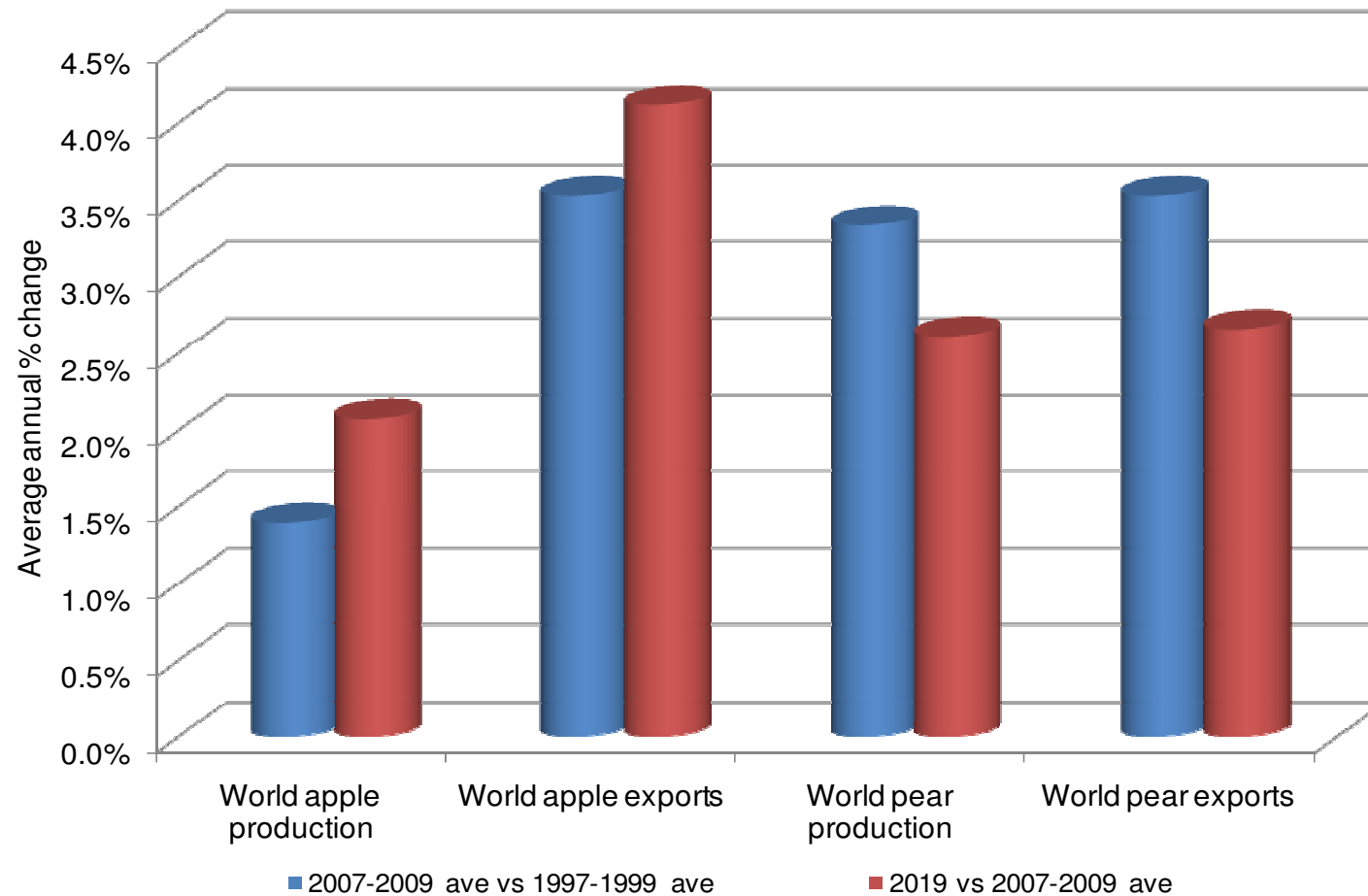
# Table Grapes – Local Market



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# Apples and Pears - Global



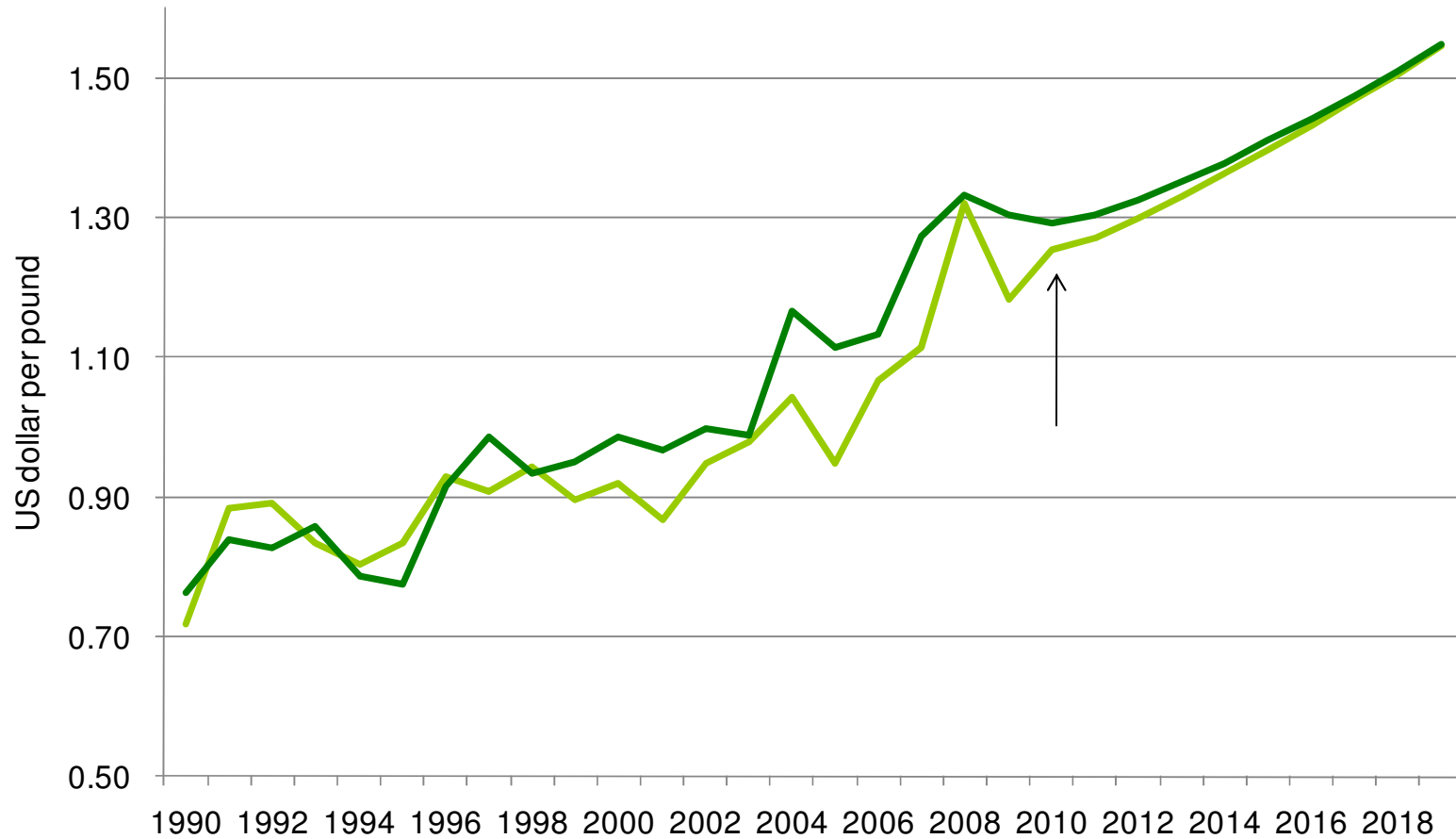
Source: World Apple Review 2010, World Pear Review 2009, BFAP



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# Apples and Pears – Global



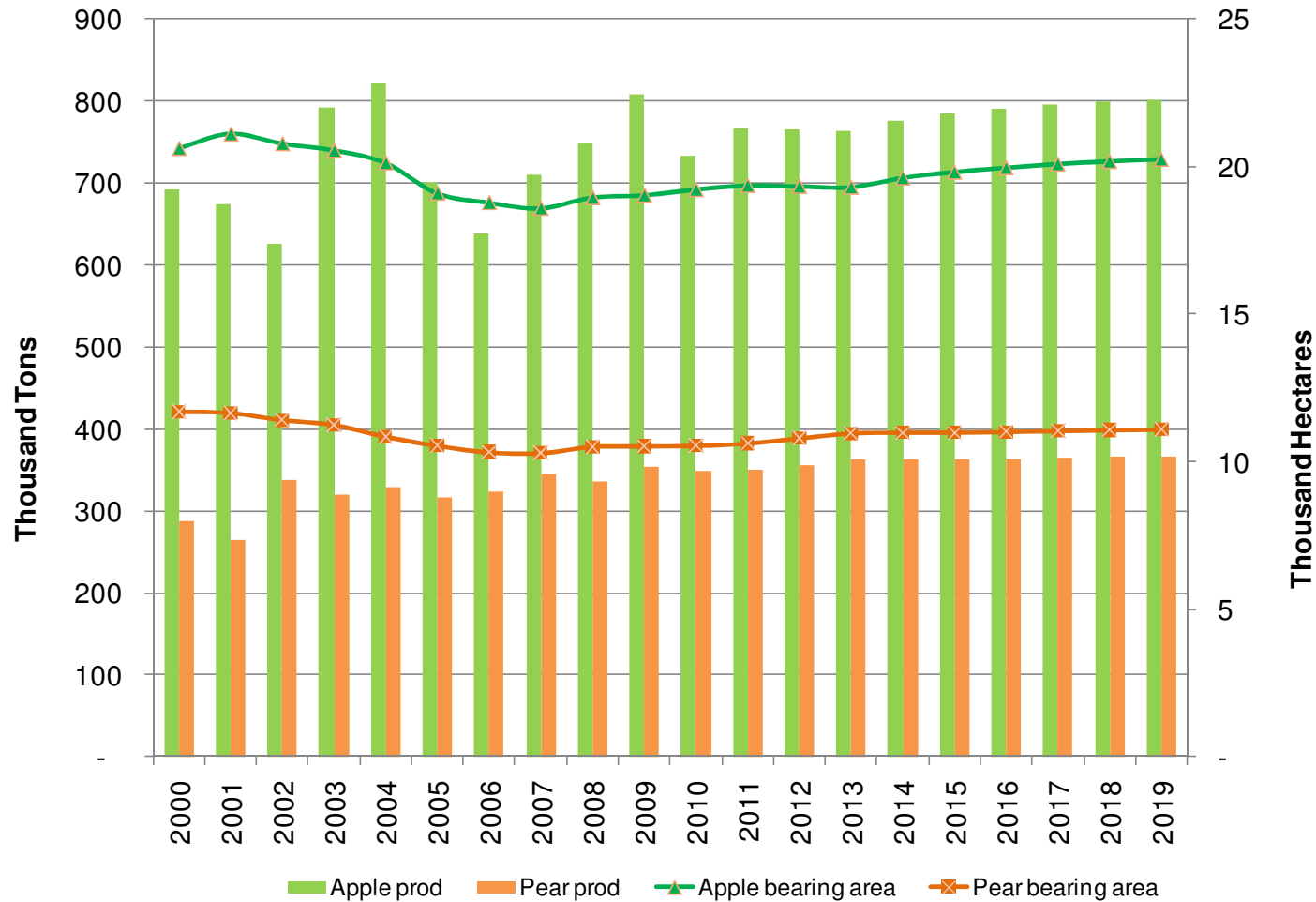
— US apple retail price (nominal) — US pear retail price (nominal)



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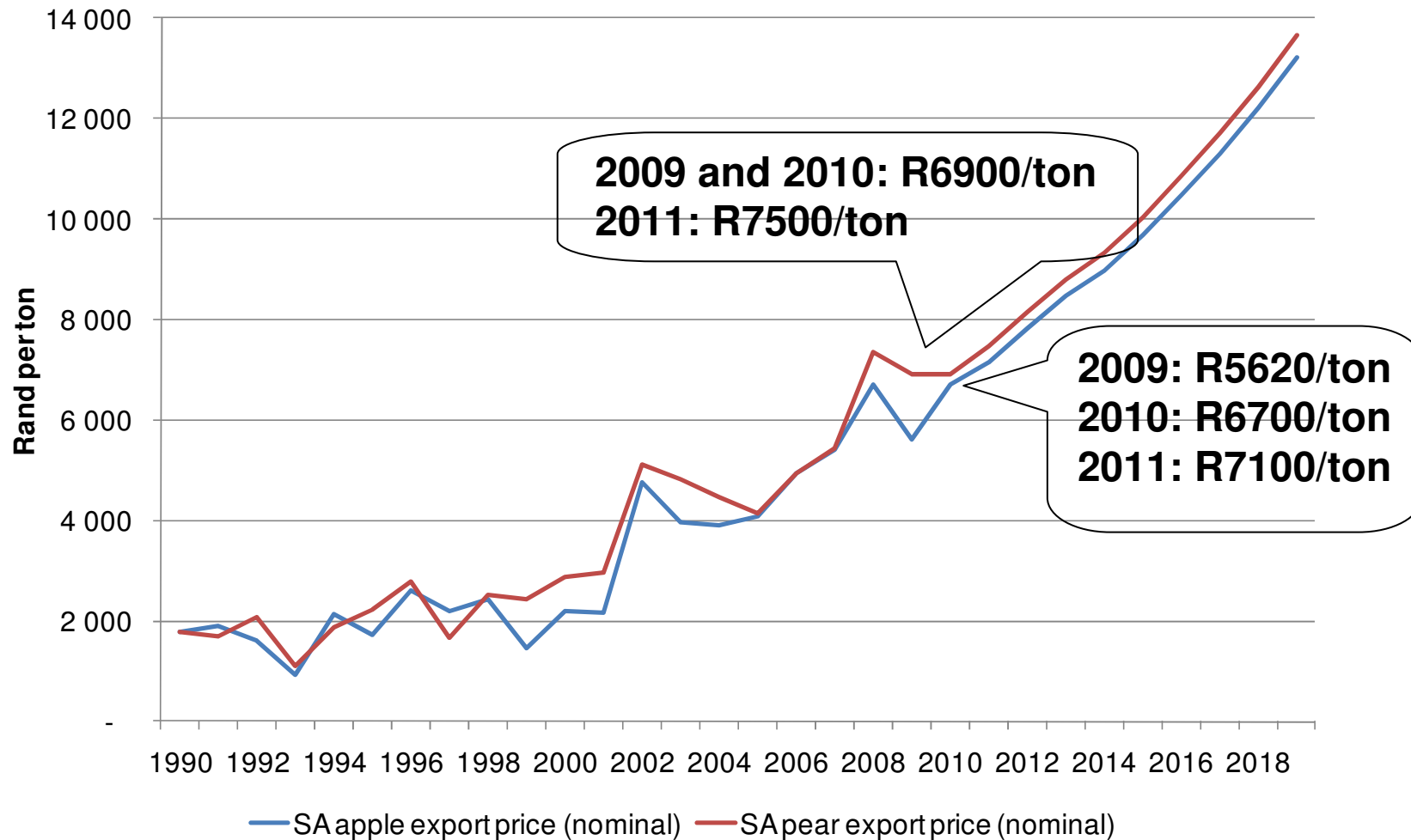
# Apples and Pears - SA



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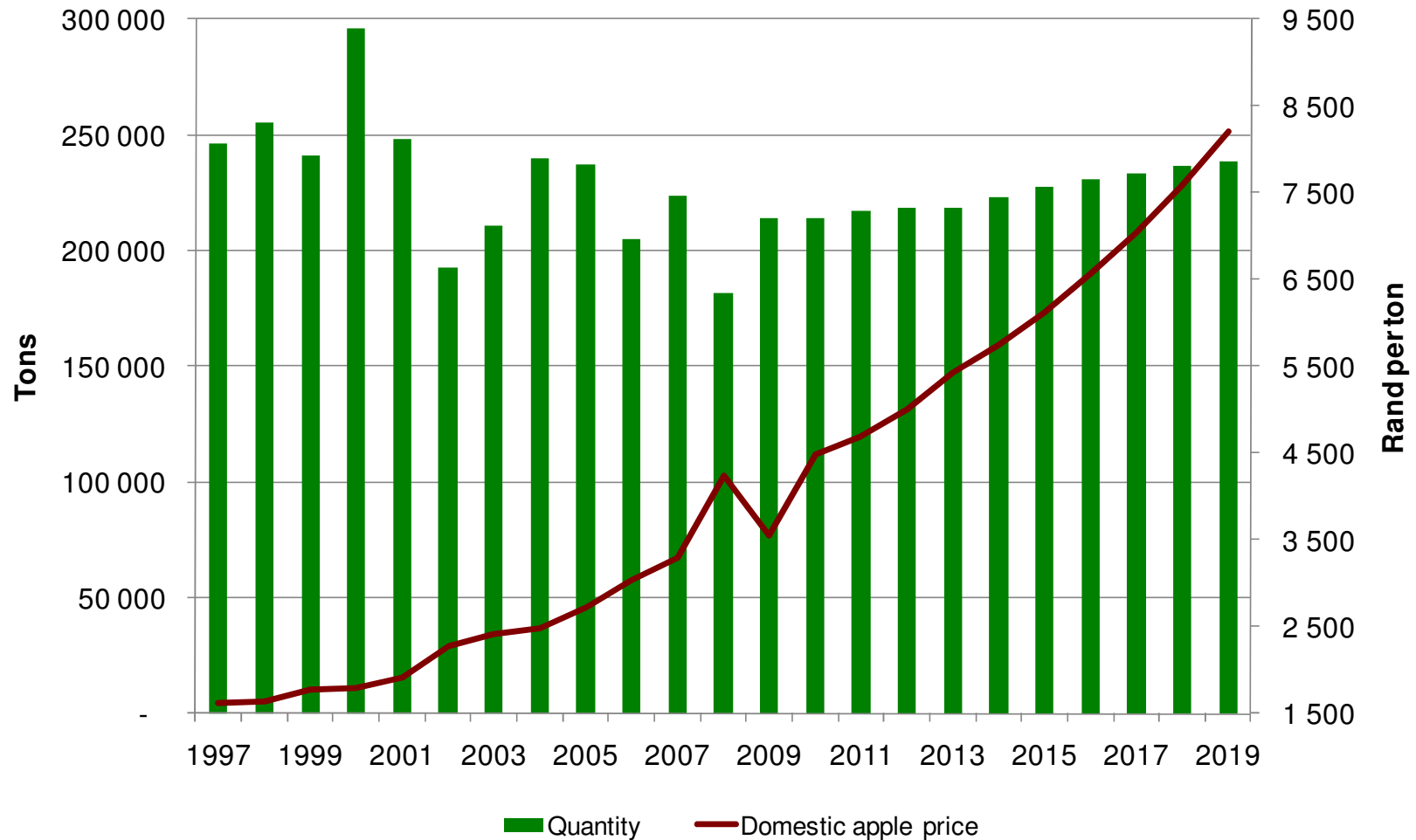
# Apples and Pears – Export Price



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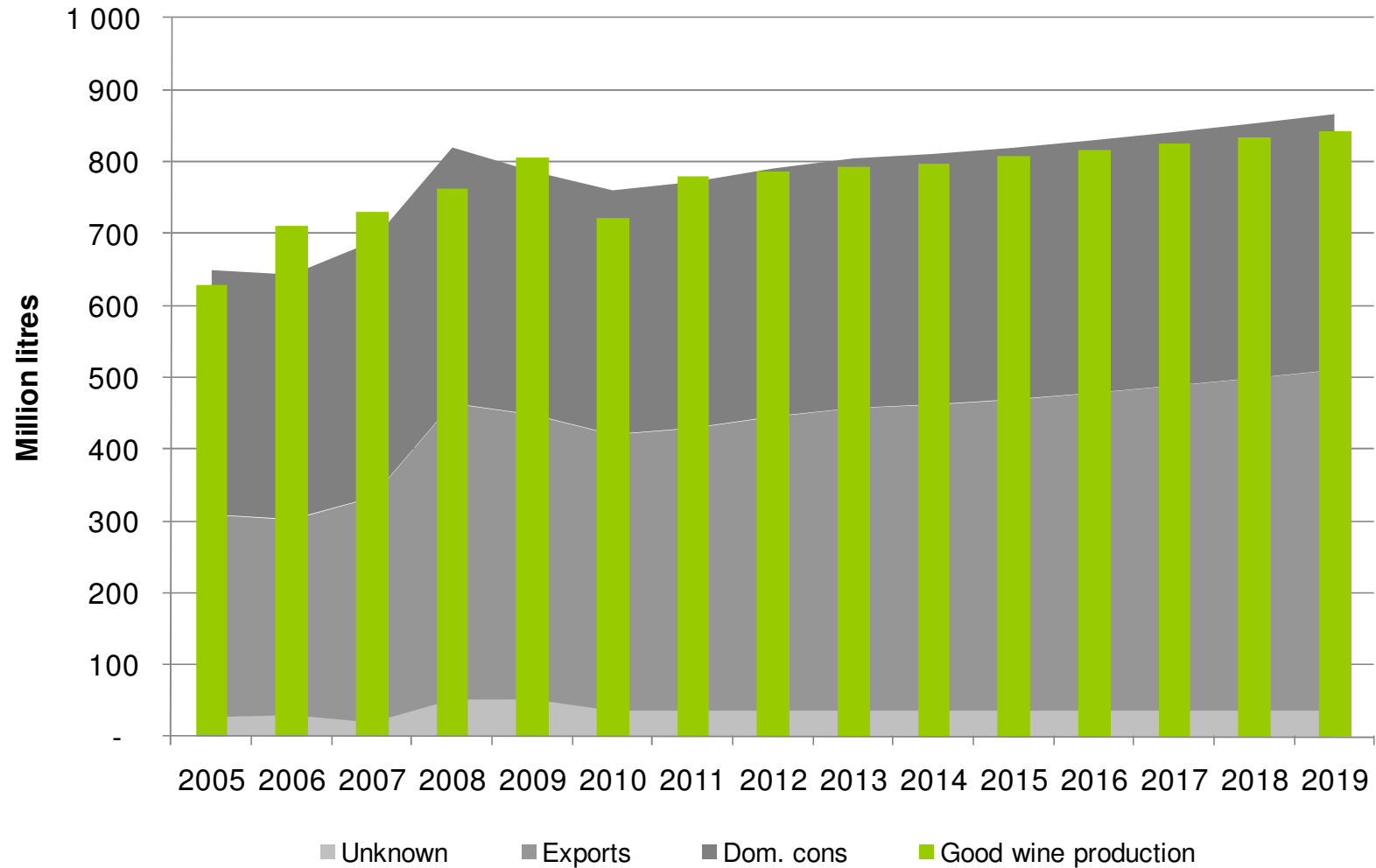
# Apples – Local Market



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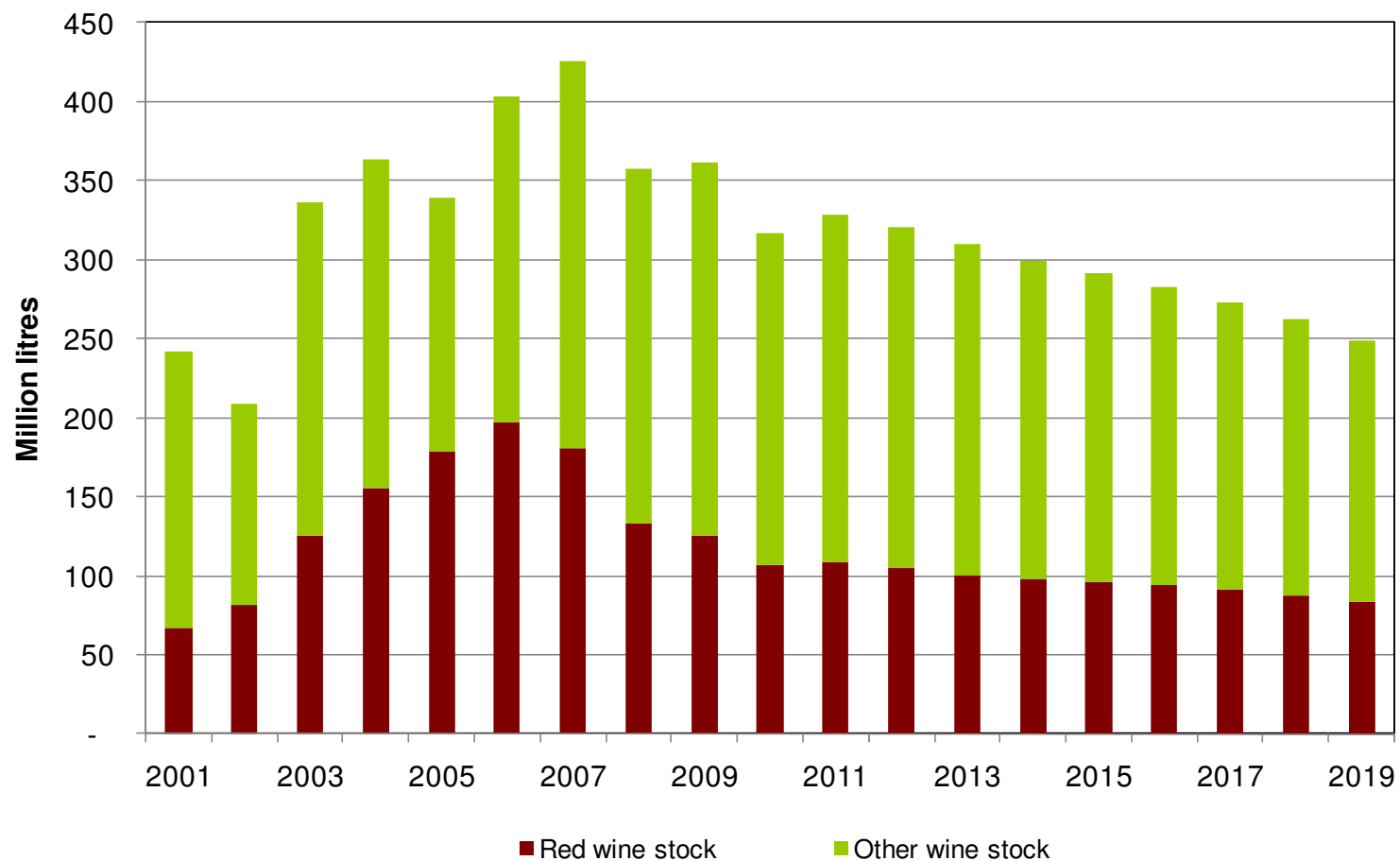
# Wine – Supply and Demand



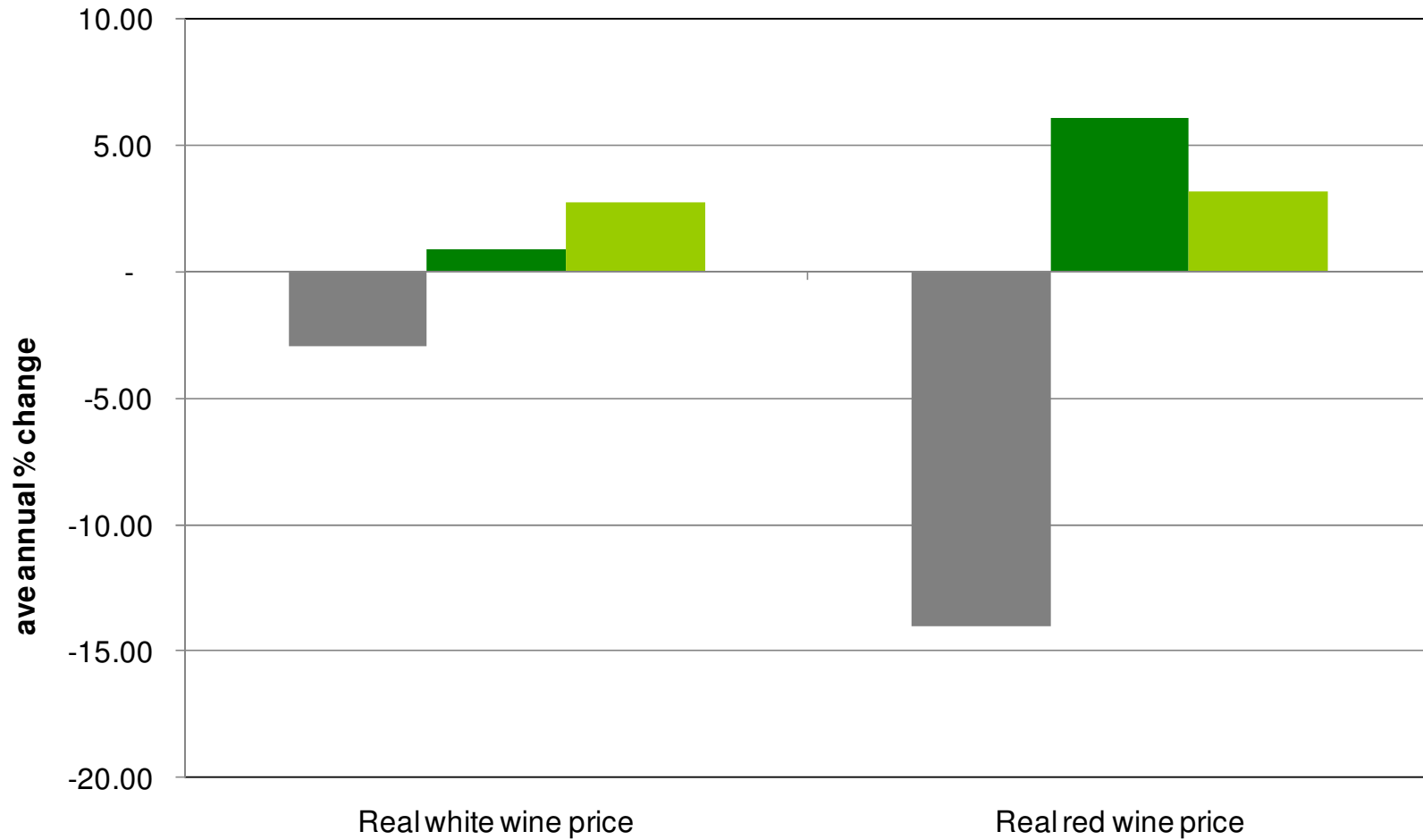
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# Wine Stocks



# Real Wine Prices



■ 2002-04 ave to 2007-09 ave

■ 2007-09 ave to 2014

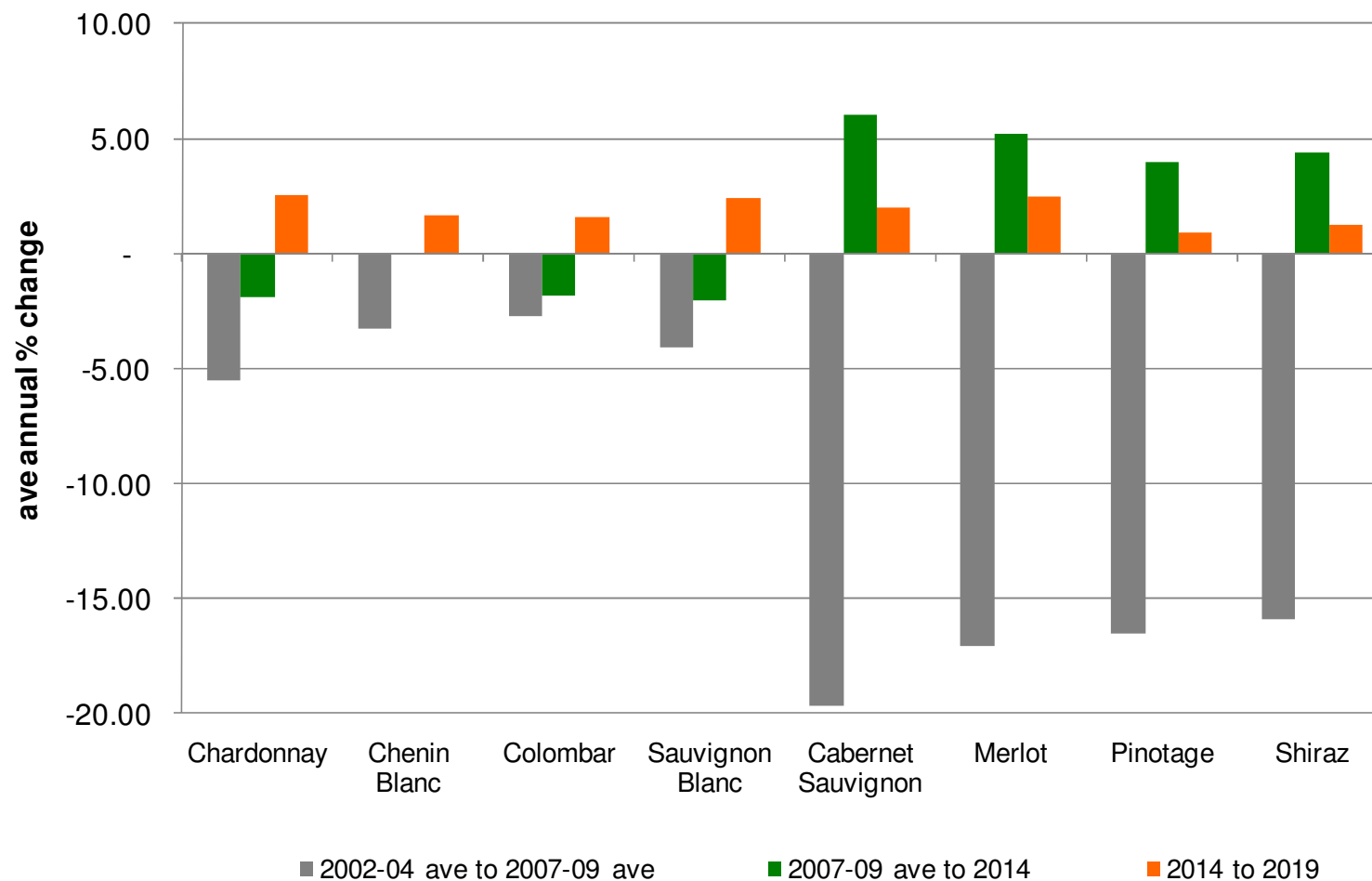
■ 2014 to 2019



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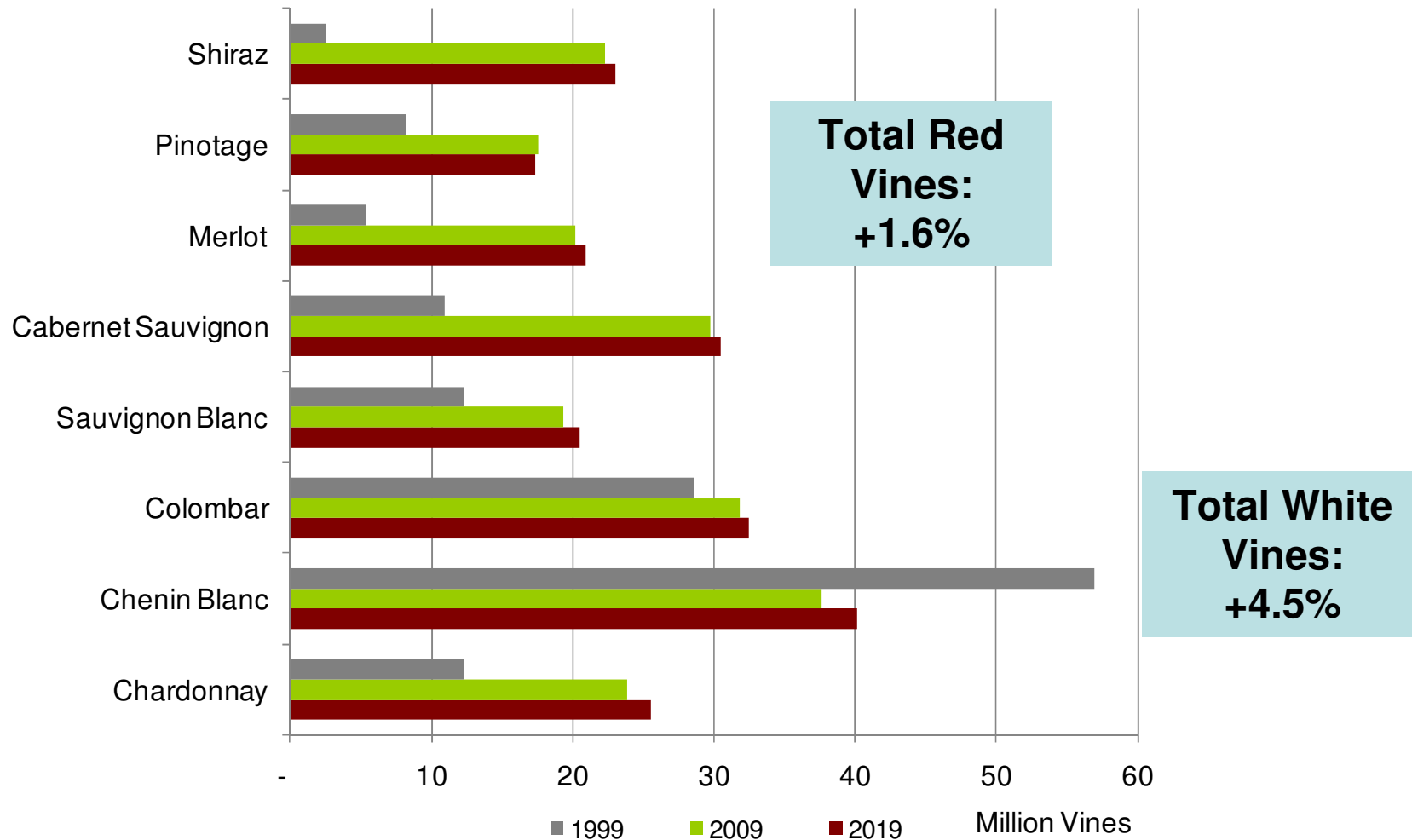
# Real Wine Grape Prices



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# Wine Grape Vines



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**Thank you!**



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