

A PROFILE OF THE SOUTH AFRICAN OATS MARKET VALUE CHAIN

2021



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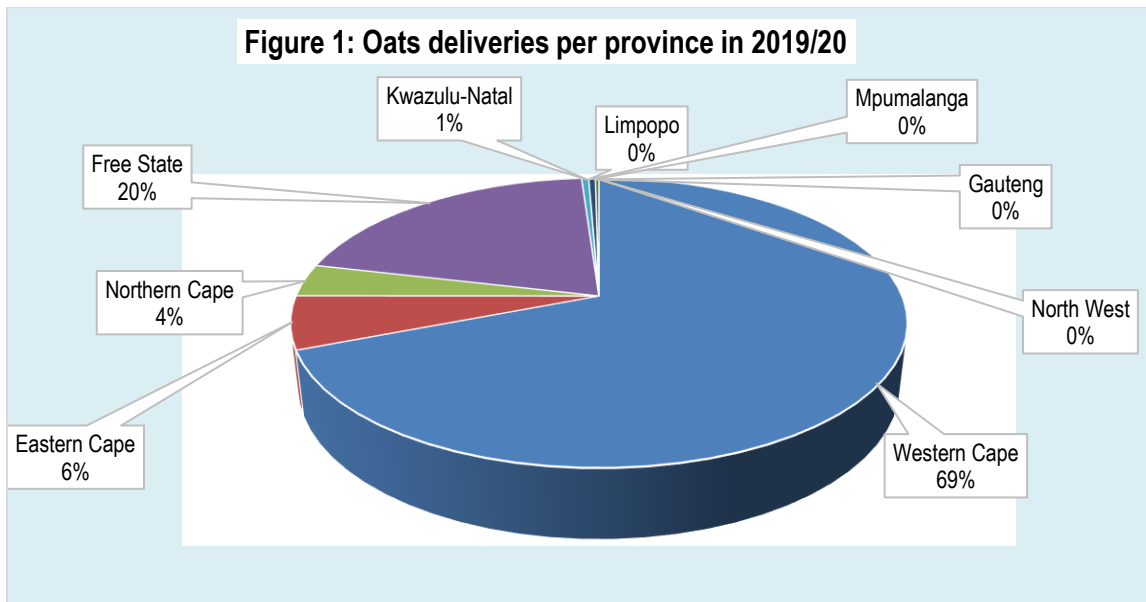
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1. DESCRIPTION OF THE INDUSTRY

Oats are primarily used for manufacturing of animal feeds and human consumables such as breakfast cereals and energy bars. Most of oats produced in South Africa are processed locally while smaller volumes are also exported to other SADC countries such as DRC, Namibia, Botswana and Lesotho, with very minimal volumes exported to Asia. The local production for oats stood at an average of 39 700 tons per annum over the past ten years while the local consumption remained considerably higher at 55 785 tons per annum. On average, about 23 921 tons of oats were imported over the past ten years as the local production is not sufficient to meet the local demand.

1.1 Production Areas

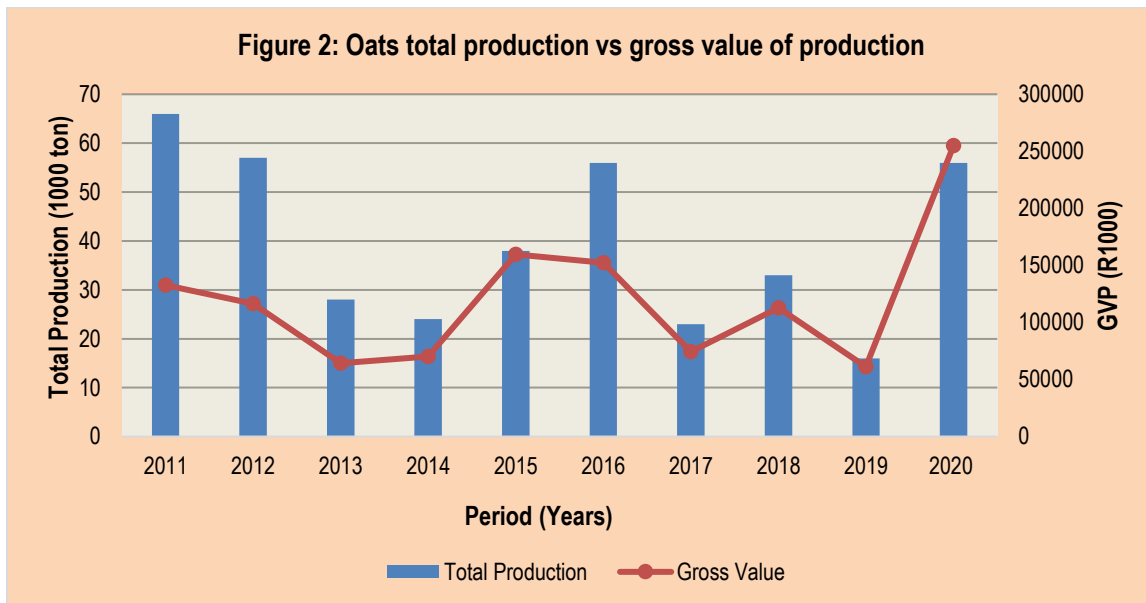
Oats is a winter crop suited for planting in the winter rainfall area such as the Western Cape Province. It can also be produced under irrigation in other provinces. Oats is produced mainly in the Western Cape, Eastern Cape, Free State, Northern Cape and slightly in Limpopo provinces. The contribution of various provinces to the total national supply is illustrated on Figure 1 below.



Source: SAGIS

Figure 1 above indicates that farmers in the Western Cape are the major contributors to the South African total oats supply. The Western Cape Province accounted for about 69% of South Africa's total oats supply in 2019/20 marketing season followed by the Free State Province with 20%. The fact that Western Cape is a winter rainfall area makes the province a suitable location for production of oats and other winter cereals such as wheat and barley. The supply of Oats from other provinces such as Limpopo, Northern Cape and Eastern Cape has been very low during 2019/20 marketing season.

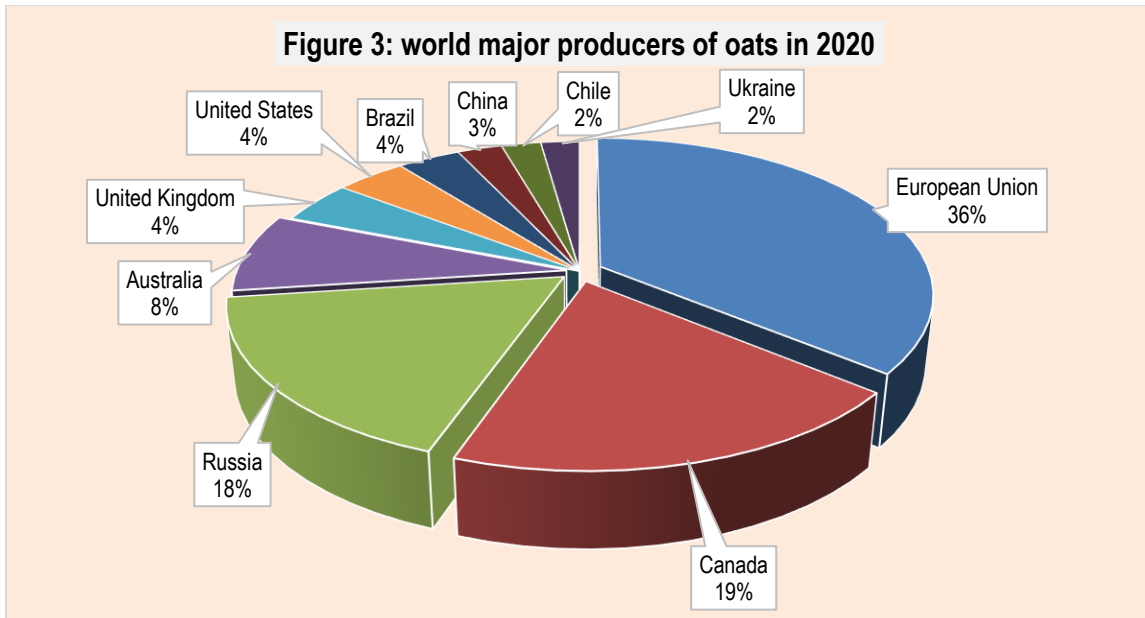
1.2 Production Trends



Source: *Statistics and Economic Analysis*

In South Africa, an average of about 40 thousand tons of oats is produced annually and the volume fluctuates every year depending on plantings, weather conditions as well as prices of other competing crops. Figure 2 above shows that the local production volumes and gross value of production were slightly higher in 2011. However, the gross value of oats production followed an opposite direction and recorded a decrease in 2012 as compared to the lower values attained during 2011. 66 thousand tons of oats were produced during the year 2010 and this was followed by a decrease in production volumes during the year 2012. It is notable from Figure 2 that the gross value of oats production has been following similar trend as production. The graph further indicates that there was a drastic increase in gross value of production above total production volume from the year 2016 up until 2020. This might be as a result of drought conditions that affected the final output and increased demand for cereals. The gross value of oats production decreased drastically in 2019 marketing season while production volumes were at their lowest during the same year. The period under review closed with increasing trends for both production volumes and gross value of Oats produced.

Figure 3 below shows contribution of major Oats producing countries to the global oats production in 2020. During the year 2020, a total of about 25.72 million tons of oats were produced globally. The European Union accounted for about 36% of global Oat's production followed by Canada with 19% and the Russian Federation with 18%. Countries such as Australia, United Kingdom, Brazil, contributed a total of 12% towards the world's total oats production.

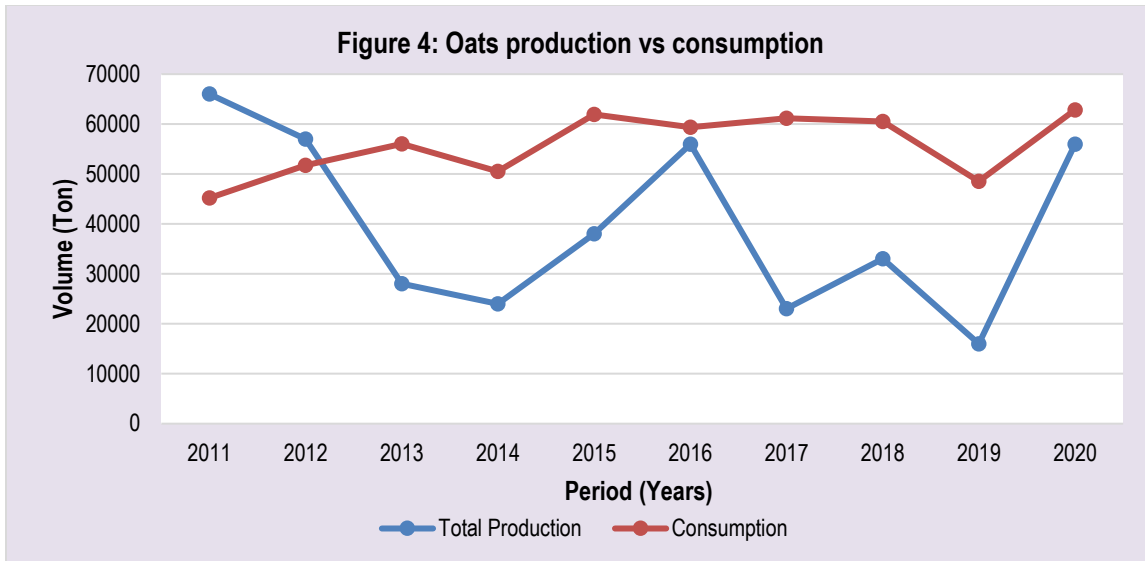


Source: FAOSTAT

2. MARKET STRUCTURE

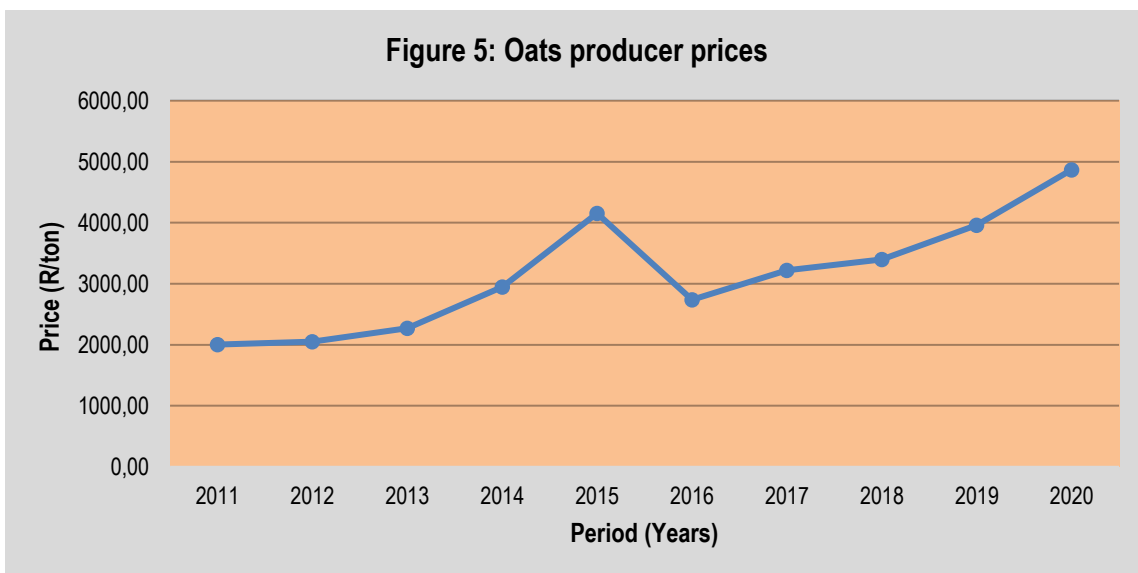
2.1 Domestic Market

The local oats production amounts to approximately 39.8 thousand tons per annum, contributing an average of 121 million Rand towards the gross value of agricultural production per annum. The local oats consumption is about 56 thousand tons per annum resulting in a deficit of approximately 16.08 thousand tons of oats every year. About 82% of the total domestic oats supply is used for human consumption while animal feed industry constitutes only 10% of the domestic oats market. The remaining 8% is sold as seed for planting.



Source: Statistics and Economic Analysis and SAGIS

Figure 4 above indicates that in 2020, the period under analysis opened with moderate volumes of local oats production to some extent below consumption. The volumes of oats consumption increased continually throughout the period under analysis with the exception of the respective years 2014, 2016 and 2018 where slight declines in consumption were recorded. Moreover, the production volumes experienced major declines between the years 2013, 2014 and 2017 and this further widened the gap between the local production and consumption. The volume of oats production increased to the levels above consumption quantities during the year 2011 and 2012, respectively. The period under analysis closed with an increasing trend in local production, whereas the consumption volume similarly showed some slight declines during the 2019 marketing season.



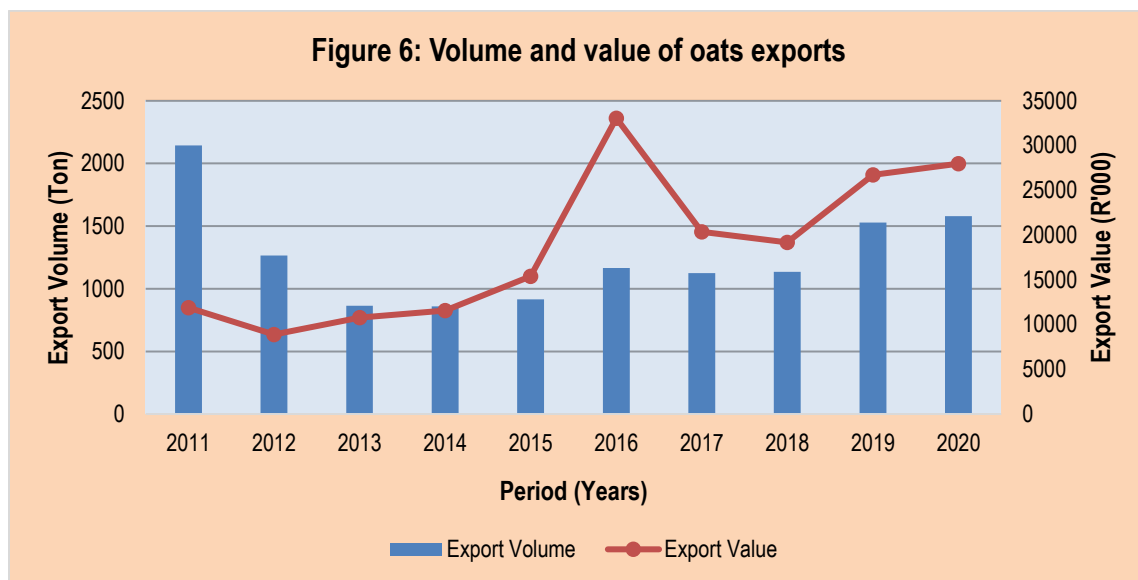
Source: Statistics and Economic Analysis

Oats is an internationally traded commodity and the oats industry in South Africa, just like other agricultural commodities operate in a deregulated market environment. The local oats prices are

determined by forces of demand and supply and are influenced heavily by global prices as well as production in major producing countries such as the European Union, Russian Federation, Canada, Australia and Finland. Figure 5 shows that the local oats prices opened at record low levels during the year 2011. As indicated in the figure, the highest price was attained during the year 2015 above R4 000/t. This can be as results of high demand triggered by the severe weather conditions that affected the final crop in the domestic market. The lowest price of oats attained was R2003.10 in 2011, a slightest decrease of 8.3% compared to 2010. The producer price of oats closed at R4 868.05 during the 2020 marketing season, which is 22.9% higher as compared to the previous season.

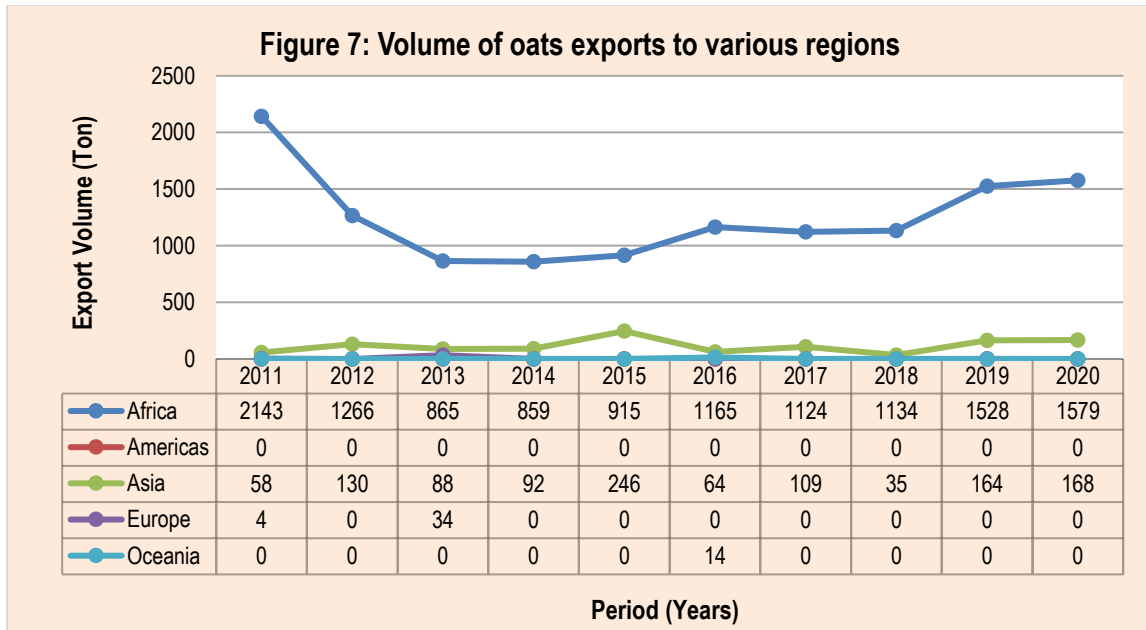
2.2 Exports

The volumes and value of oats exported by South Africa between the years 2011 and 2020 are depicted in Figure 6 below. On average, South Africa exports about 1 185 tons of oats per annum to the value of about 16.3 million Rand annually.



Source: Quantec Easydata

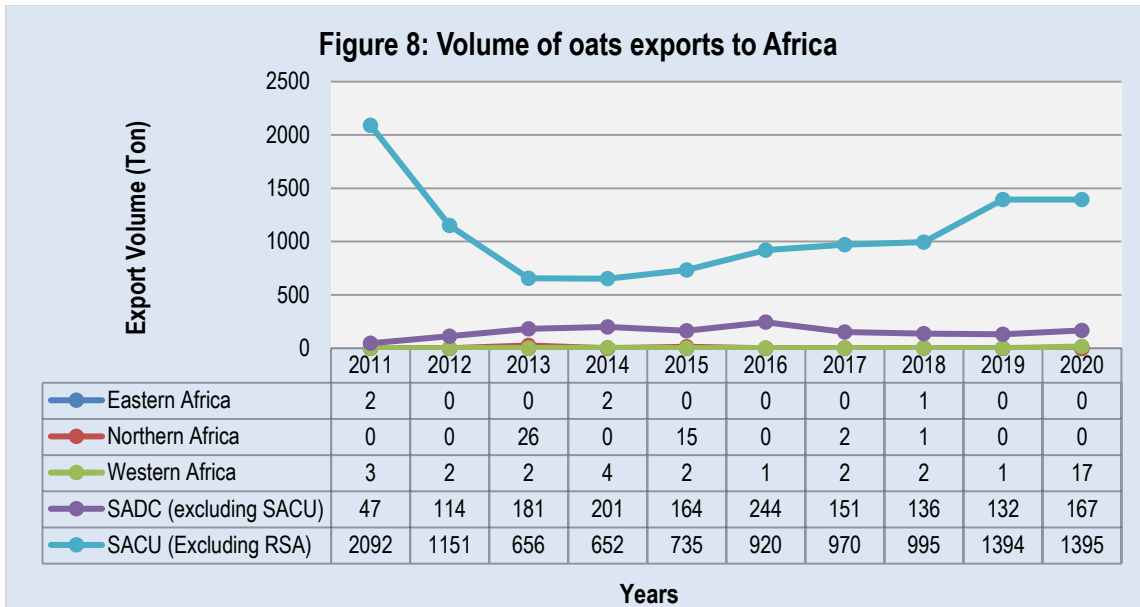
Figure 6 specifies that the volume and value of oats exports fluctuated considerably over the period under analysis with the export volumes reaching a peak during the year 2011. The period under analysis opened with the record high volumes and lower values of oats exports. This was followed by a notable decrease in volumes of exports from the year 2012 until 2014. The volume of oats exports has been above export value throughout the period under review, except for the year 2015, 2016, 2017, 2018 and 2019. In 2016, the value of oats exports reached a peak above R30 million, and that was followed by a drastic decline in 2017. However, the period under review closed with an increasing trend in the value of Oats exports accompanied by an increase in volumes in 2020. South Africa exports its oats mainly to the African Continent, Asia and Europe. The following figure (Figure 7) gives a picture regarding destinations of oats exported from South Africa for the past ten years.



Source: Quantec Easydata

Figure 7 indicate that South Africa exported oats mainly to Africa, Asia and marginally to Europe between 2011 and 2020. The figure also shows that the African continent absorbed the larger portion of oats originating from South Africa over the period under analysis. Volumes of oats exports to Asia were inconsistent and lower during the period under review and increased slightly above 200 tons during the 2015 marketing year. On average, about 91% of oats exported by South Africa over the past decade went to the African countries while about 8.1% went to Asia and the remaining percentage was shared amongst the Americas, Europe and Oceania. The period under review closed with stable and moderate volumes of oats exports to African continent as compared to the rest of the world.

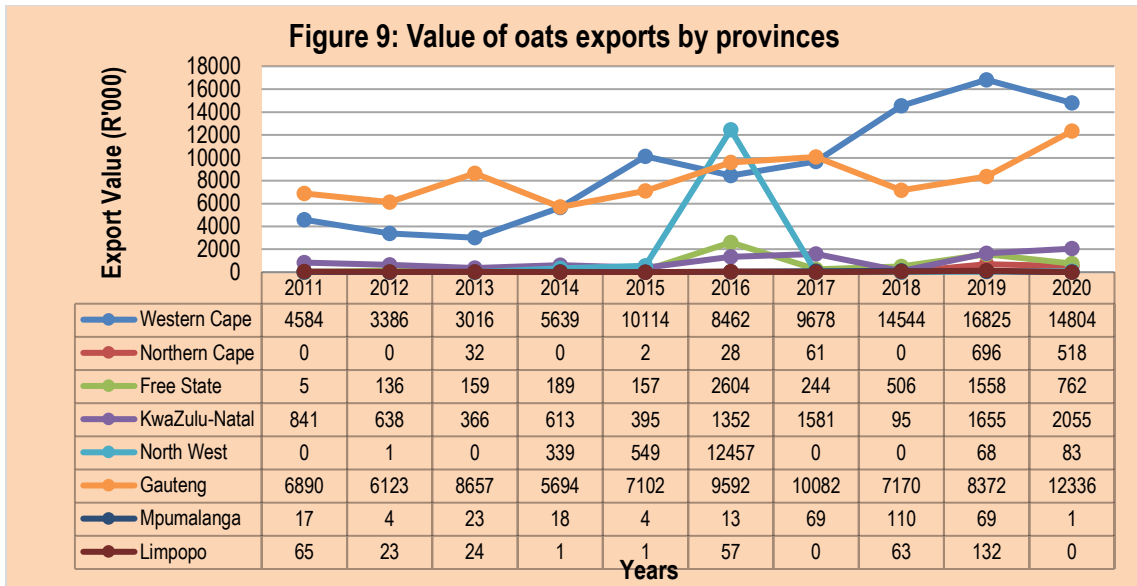
On the Africa continent South Africa export oats mainly to the SACU region, SADC, Western Africa and partially to Northern Africa. As it can be observed from Figure 8 below, the SACU region is the major export market on the African continent for Oats originating from South Africa. Exports to the SADC region were relatively lower and stable for the entire period under analysis while those to SACU fluctuated considerably until a peak was reached above 2000 tons during 2011. The South African oats exports to African continent closed with an increasing trend during the year 2020, with major exports destined to the SACU, followed by the SADC region.



Source: Quantec Easydata

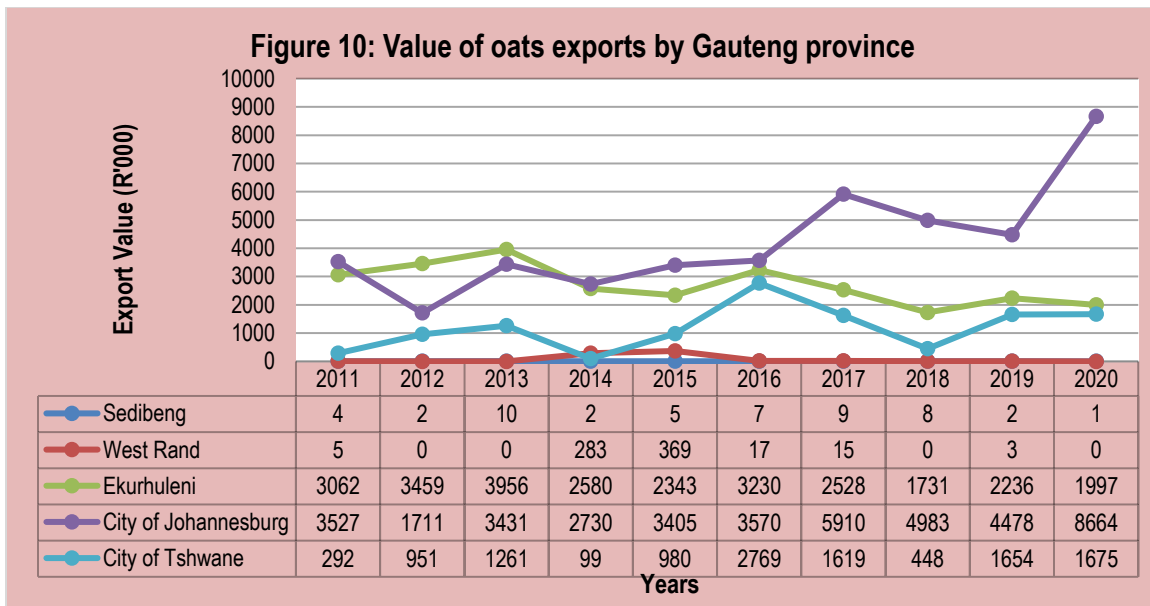
2.2.1 Provincial Oats Exports

Figure 9 shows that in South Africa, oats exports originate mainly from Gauteng, Western Cape and KwaZulu-Natal Provinces. Despite the fact that Western Cape produces more than 80% of the total oats production in South Africa, the largest volumes of oats exports are recorded as originating from Gauteng Province. Although Gauteng is not the largest producer of grains, the province plays a huge role in grain trading mainly due to the availability of grain trading facilities as well as traders situated in the province. The Randfontein grain market plays a huge role in grain trading, both locally and internationally. The availability of Cape Town harbour in the Western Cape and Durban harbour in Kwazulu-Natal province also places these provinces at an advantage in terms of grain exports. During the 2016 marketing year, substantial amount of oats exports was recorded from the North-West Province, above oats exports from all other provinces. Although very minimal exports have been recorded for the other provinces over the ten-year period, the marketing year 2020 closed with 12% decrease in values of oats exports for Western Cape Province and 47% increase for Gauteng Province in comparison with 2019 exports values.

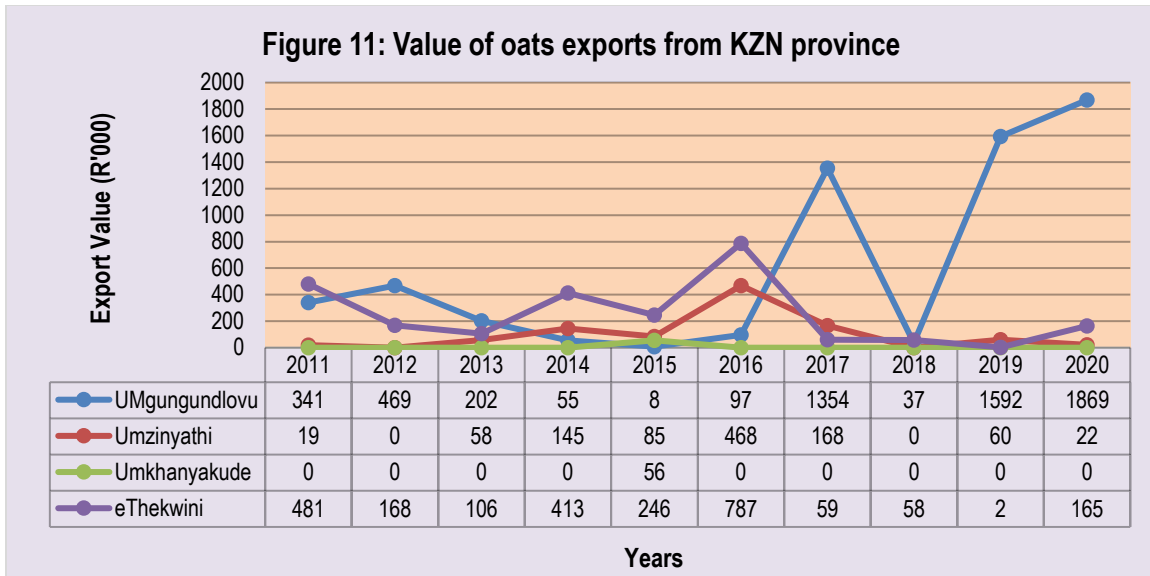


Source: Quantec Easydata

Figure 10 below shows the value of oats exports from Gauteng province for the period 2011 to 2020. In Gauteng Province, oats exports originate mostly from the City of Johannesburg, Ekurhuleni Metropolitan Municipality and marginally from the City of Tshwane. Exports from the West Rand and Sedibeng were very low and erratic throughout the period under review while those from other districts were at greater levels. The record high values of oats exports from Gauteng Province were attained at the end of the review period, originating mainly from the City of Johannesburg. Oats exports from Gauteng province closed with increasing trends from the City of Johannesburg and Tshwane in 2020 compared to 2019.



Source: Quantec Easydata

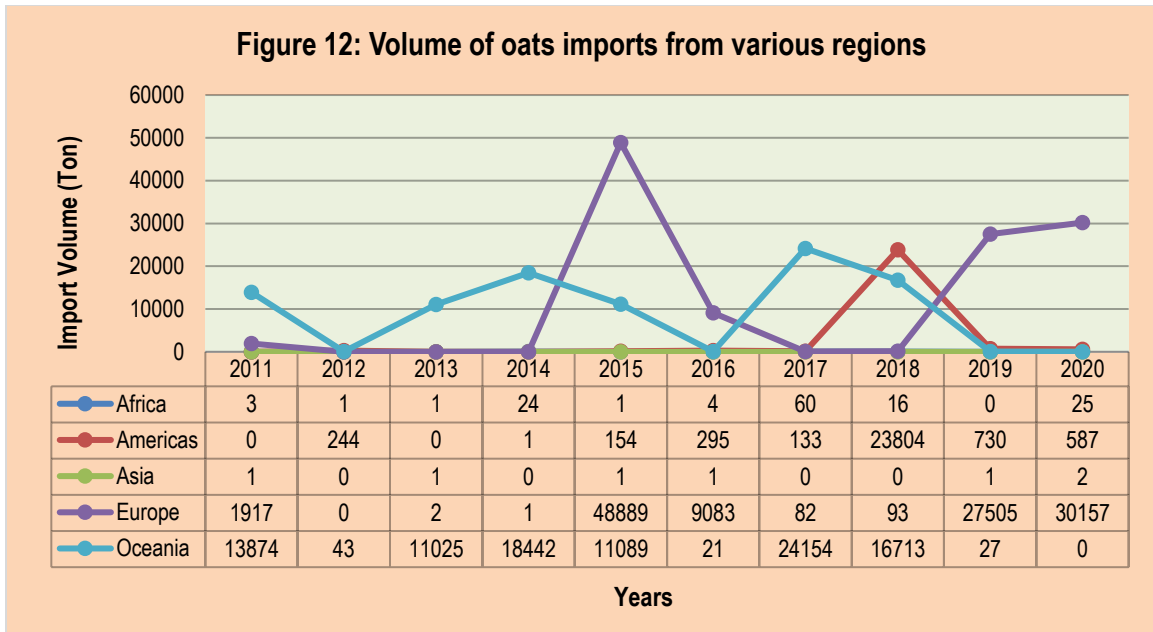


Source: Quantec Easydata

Figure 11 indicate the value of oats exports from KwaZulu-Natal Province from 2011 until 2020. The period under analysis opened with higher values of oats exports from the province in 2011, with recorded exports from eThekwini district exceeding those originating from other regions. This was followed by a slight decrease in the value of oats exports originating mainly from eThekwini districts in 2012 while uMgungundlovu recorded higher value during the same year as compared with 2011. The values of oats exports from KwaZulu Natal Province fluctuated considerably throughout the period under analysis, until the greatest export values were attained from uMgungundlovu district in 2017. Figure 11 indicates that over the period under review, oats exports in Kwazulu-Natal province originated mainly from uMgungundlovu District followed by eThekwini Metropolitan Municipality. The period under review closed with increased values of oats exports from KwaZulu Natal Province, mainly from uMgungundlovu District in 2020.

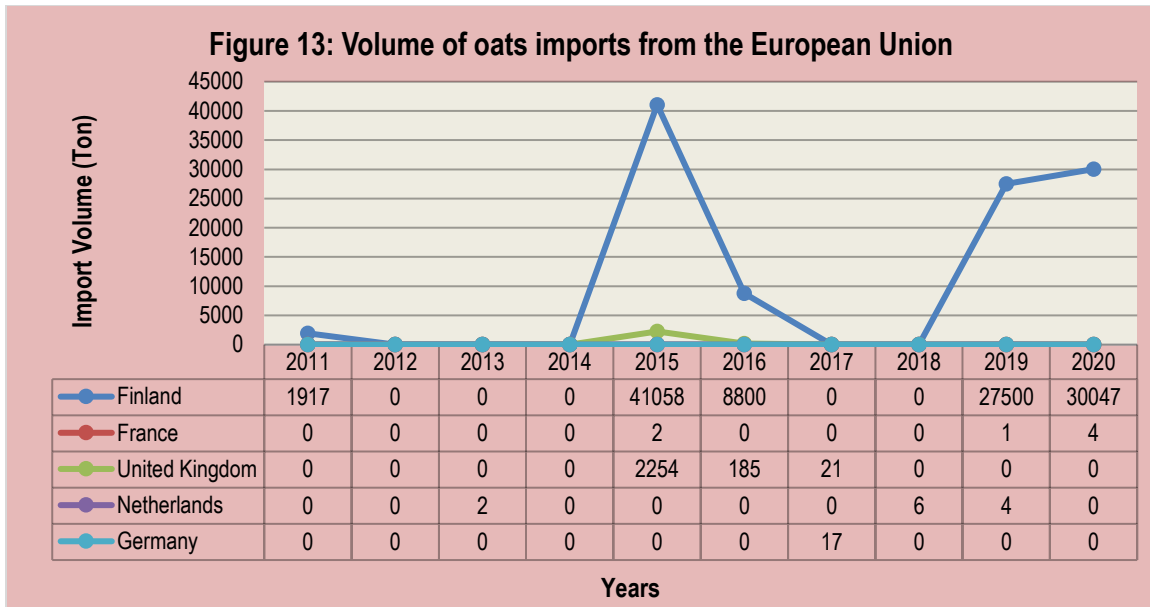
2.2 Imports

South Africa imports an average of about 21 thousand tons of oats per annum in order to supplement the local production which is too low to meet the local demand. Figure 12 below gives an indication of oats imports from various regions for the period 2011 to 2020.



Source: Quantec Easydata

Figure 12 above shows that the South African oats imports originate mainly from Oceania and Europe, with marginal imports originating from the Americas. Imports from the African region were very low and erratic over the period under analysis. The highest volume of oats imports was recorded during the year 2015, originating mainly from Europe. This can be attributed to lower production levels experienced as a result of drought which affected the country during that period. From Oceania, the highest imports were achieved during the year 2017 while the lowest volumes from this region were imported in both 2012 and 2016 respectively and no imports were recorded from this region in 2020. On average, South Africa imports about 239 207 thousand tons of oats per annum and about 49% of the above-mentioned imports originate from Europe followed by Oceania which constitutes 43%. The 2020 marketing season closed with relatively higher volumes of oats imports originating from the Europe, surpassing imports from Oceania and all other regions.



Source: Quantec Easydata

In general, the volumes of oats imported from European Union were low for the most part of the period under review. Figure 13 shows that within Europe, South Africa imports oats mainly from Finland which is also one of the largest producers of oats globally. The figure further shows that oats import from Finland fluctuated considerably over the period under review, reaching a peak during the year 2015. From Figure 13 oats imports from Germany, France and United Kingdom were very low throughout the period under analysis. The 2017 marketing period closed with relatively lower margins of oats imports originating from the European Union. Although the majority of imports from the EU originate mainly from Finland, in 2018, there was a total decline (0%) in oats imports from the EU, especially from the United Kingdom and Germany as compared to the previous season. However, the period under review closed with high oats imports from Finland.

2.3 Uses of Oats and Market Value Chain

2.3.1 Uses

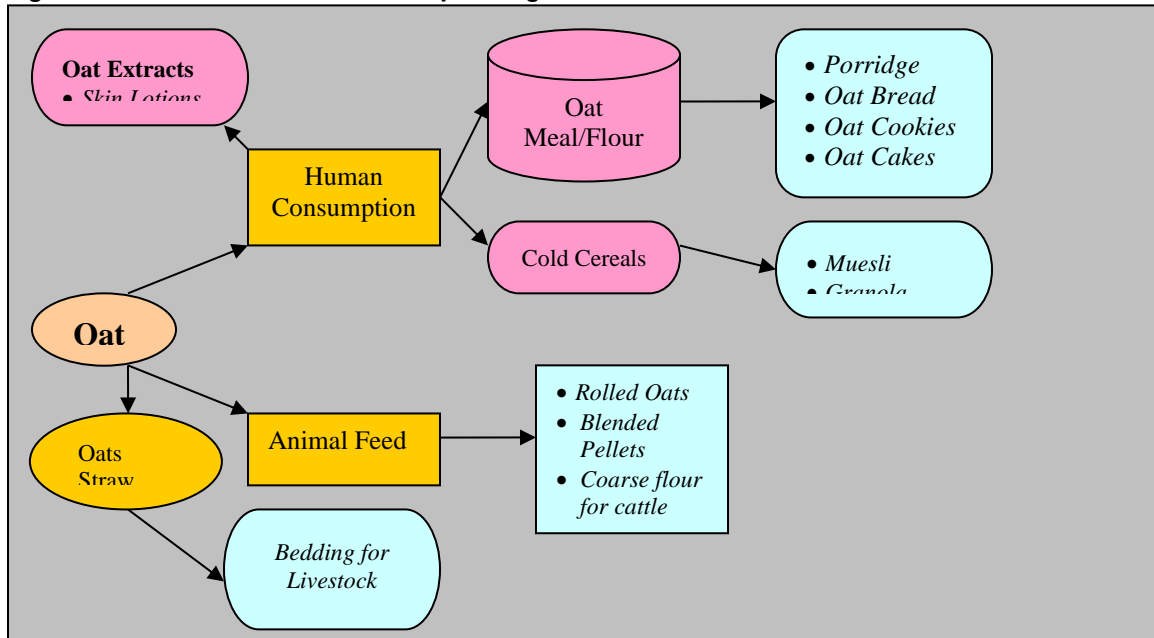
Human Consumption:

Oats have numerous uses in food; most commonly, they are rolled or crushed into oatmeal, or ground into fine oat flour. Oatmeal is chiefly eaten as porridge, but may also be used in a variety of baked goods, such as oatcakes, oatmeal cookies, and oat bread. Oats are also an ingredient in many cold cereals, in particular muesli and granola. Oats may also be consumed raw, and cookies with raw oats are becoming popular. Oats are also occasionally used in several different drinks. They can also be used for brewing beer. A cold, sweet drink made of ground oats and milk is popularly used as refreshment throughout Latin America.

Animal Feed:

Oats are also commonly used as feed for horses - as crimped or rolled oats or as part of a blended food pellet. The oat hull must be crushed (rolled or crimped) for the horse to digest the grain. Cattle are also fed oats, either whole, or ground into coarse flour using a roller mill, burr mill, or hammer mill. Oat straw is prized by cattle and horse producers as bedding, due to its soft, relatively dust-free, and absorbent nature.

Figure 14: The Value Chain Tree explaining various uses of oats

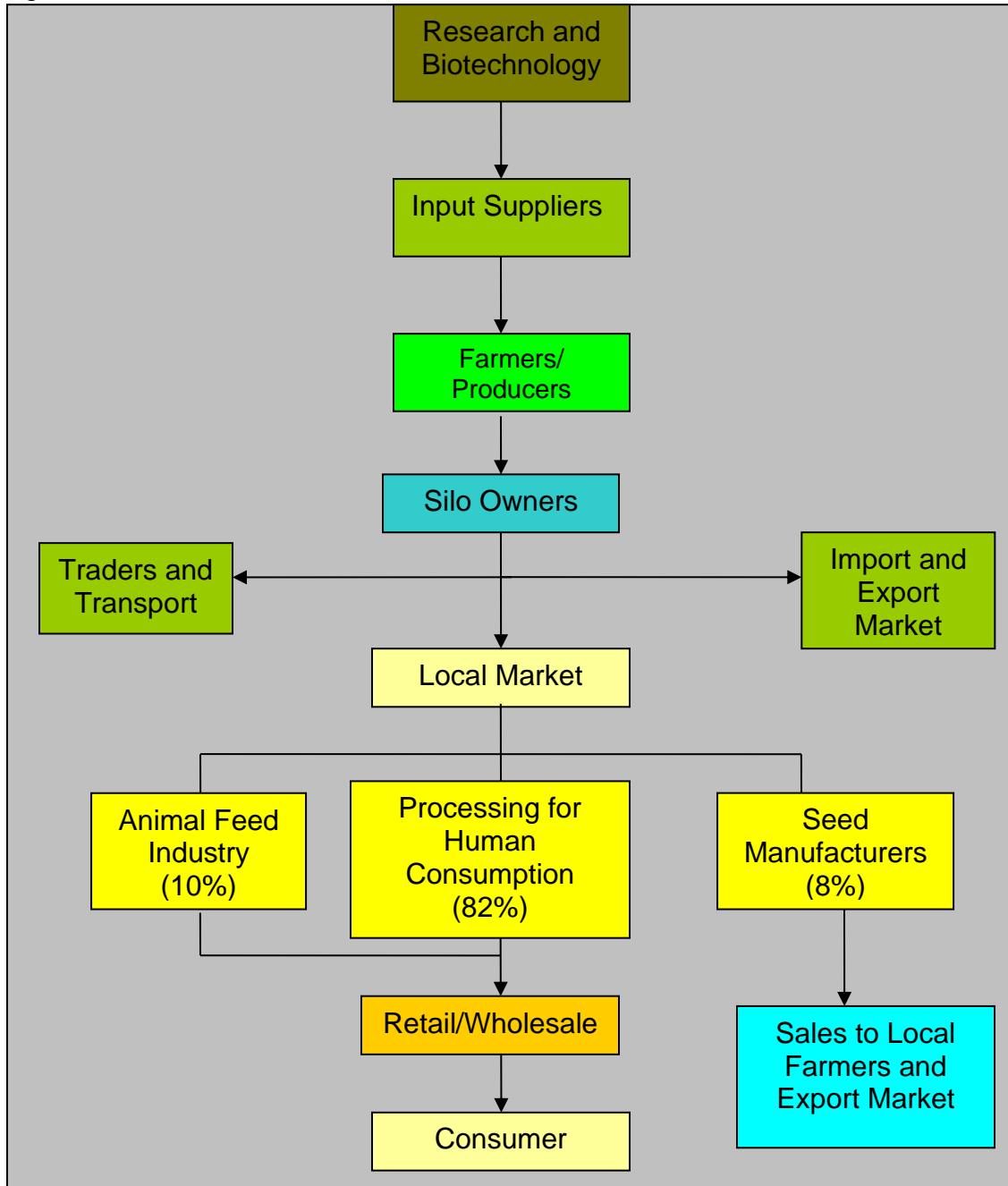


2.3.2 The Market Value Chain

The oats market value chain can be broken down into the following levels: producers of oats (farmers); silo owners (who store oats for their own account and on behalf of others); oats traders (who market and sell oats); processors of oats (who convert it into usable form); and end users.

The primary sector consists of input suppliers, producers and silo owners. Silo owners provide storage facilities to handle the crops, to store oats safely and to supply it to buyers on a continuous basis throughout the year. The secondary sector consists of millers and animal feed manufacturers. Millers and crushers convert oats to oats meal for further processing into human consumables such as breakfast cereals while animal feed manufacturers use oats for the manufacture of feeds. It is very important to note that processing for human consumption is the most important component of the oats value chain absorbing about 82% of the local oats supply while 10% is used to manufacture animal feeds. Seed manufacturers use about 8% of the local oats supply to make seeds for planting.

Figure 15: Oats Market Value Chain



Source: Percentages calculated from SAGIS data

3. MARKET INTELLIGENCE

3.1 Tariffs

South Africa applies no tariffs on imports of oats originating from other countries. However, South Africa faces various tariff levels when exporting oats to different countries in the world. The following table (Table 5) shows tariffs that are applied by various export markets on oats originating from South Africa.

Table 5 indicates that South Africa is facing import duties when exporting oats to Korea Republic, China and the Democratic Republic of Congo. Although countries such as Mozambique, Zambia and Zimbabwe apply import duties on imports of oats from elsewhere, South Africa can export oats to these countries free of duty due to the preferential tariff structure that is maintained between these countries and South Africa. On the other hand, South Africa exports its Oats free of duty to Botswana, Namibia, Eswatini and Lesotho who are all SACU members...

Table 5: Tariffs applied by various export markets on oats originating from South Africa.

Importer	PRODUCT	Trade Regime Description	APPLIED TARIFFS 2020	TOTAL ADVALOREM EQUIVALENT TARIFF 2020
Namibia	Oats: 100410 (Seed for sowing)	MFN duties (Applied)	0.00%	0.00%
	100490 (excl. seed for sowing)	MFN duties (Applied)	0.00%	0.00%
Botswana	Oats:100410 (seed for sowing)	Intra SACU rate	0.00%	0.00%
	Oats:100490 (excl. seed for sowing)	Intra SACU rate	0.00%	0.00%
Lesotho	Oats:100410 (seed for sowing)	Intra SACU rate	0.00%	0.00%

Importer	PRODUCT	Trade Regime Description	APPLIED TARIFFS 2020	TOTAL ADVALOREM EQUIVALENT TARIFF 2020
	Oats:100490 (excl. seed for sowing)	Intra SACU rate		
Mozambique	Oats: 100410 (seed for sowing)	Intra SACU rate	0.00%	0.00%
	Oats: 100490 (excl. seed for sowing)	Intra SACU rate	0.00%	0.00%
Japan	Oats: 100410 (seed for sowing)	MFN duties (Applied)	554.80%	554.80%
	Oats: 100490 (excl. seed for sowing)	MFN duties (Applied)	3.0%	3.0%
Zimbabwe	Oats: (100410) for Seed Oats: (100490) Other	Preferential tariff for South Africa	0.00%	0.00%
Eswatini	Oats: (100410) for Seed Oats: (100490) Other	Preferential tariff (SADC) for South Africa	0.00%	0.00%

Source: ITC Market Access Map

3.2 Performance of the South African Oats Industry

Table 6 below shows the list of importing countries for oats exported by South Africa during the year 2020 as well as volume and value of oats exported by South Africa to such countries.

Table 6: List of importing markets for the oats exported by South Africa in 2020

Importers	Exported value 2020 (USD thousand)	Share in South Africa's exports (%)	Exported quantity 2020 (Tons)	Unit value (USD/unit)	Exported growth in value between 2016-2020 (% p.a.)	Exported growth in quantity between 2016-2020 (% p.a.)	Exported growth in value between 2019-2020 (% p.a.)
World	1868	100	1747	1069	-2	10	-8
Namibia	1229	65.8	961	1279	17	14	11
Botswana	165	8.8	111	1486	-4	-4	-37
Lesotho	128	6.9	300	427	-13	37	-14
Japan	116	6.2	125	928	0	0	54
Mozambique	65	3.5	46	1413	39	52	33
Zimbabwe	45	2.4	110	409	13	8	12
Eswatini	41	2.2	23	1783	-19	-24	-80
China	21	1.1	25	840	0	0	-9
Korea	13	0.7	15	933	0	0	0
Malawi	9	0.5	13	1000	23	-20	-85

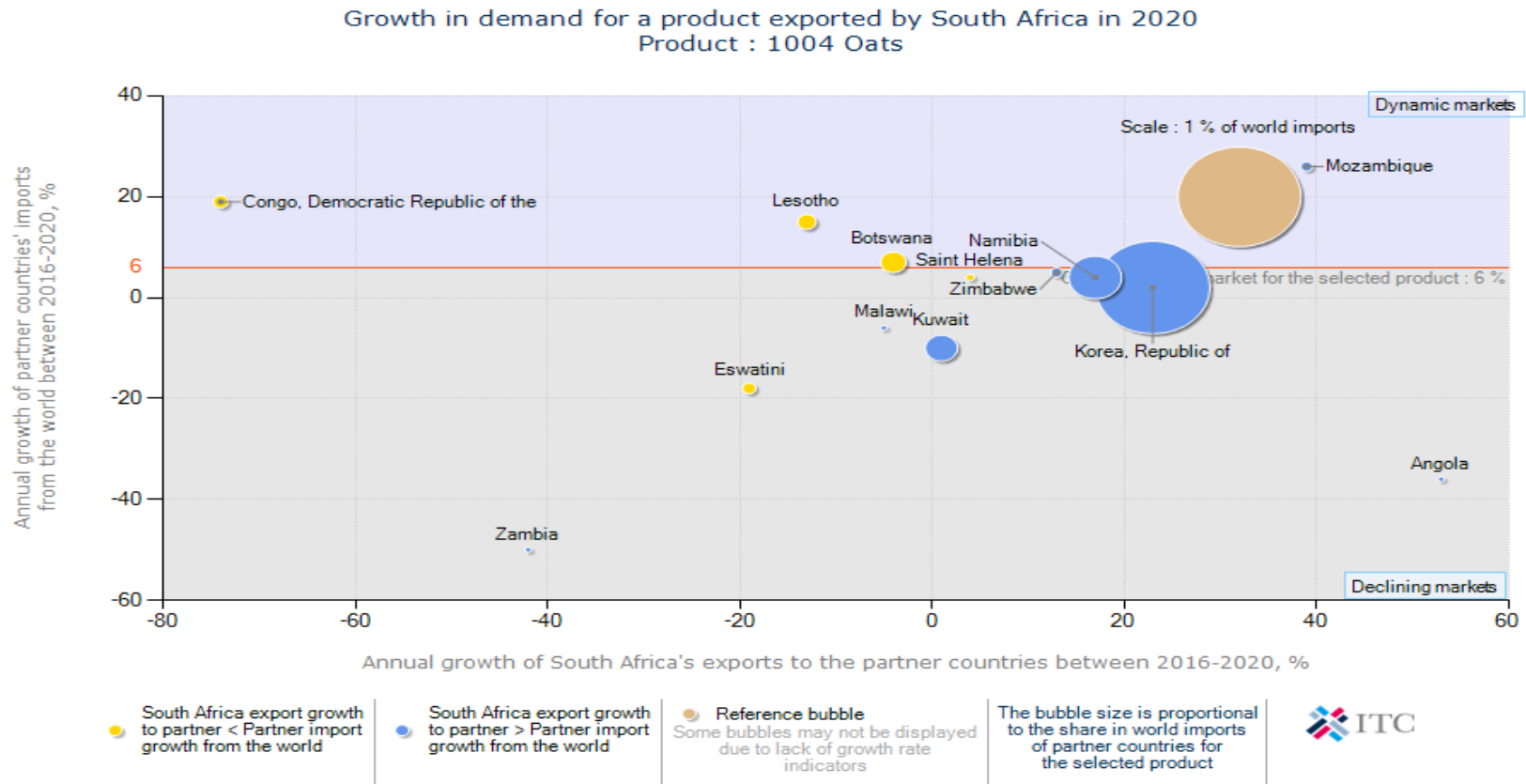
Source: ITC Trade Map

South Africa export oats mainly to countries such as Namibia, Eswatini, Botswana, Lesotho, Zambia, Korea, Eswatini, Zimbabwe, Mozambique, Malawi, Japan and China. Table 6 indicates that, during the year 2020, South Africa exported a total of 1747 tons of oats out of which about 961 tons went to Namibia. During the same year, Namibia alone absorbed about 65.8% of South Africa's total oats exports in value terms while Botswana was a destination for about 8.8% of South Africa's total oats

exports. Lesotho imported about 300 tons of oats from South Africa during the year 2020, which represents about 6.9% of South Africa's total value of oats exports. South Africa also exports lower volumes of oats to countries such as Japan, Korea Republic, Zambia, China, DRC, Zimbabwe, Mozambique, Malawi.

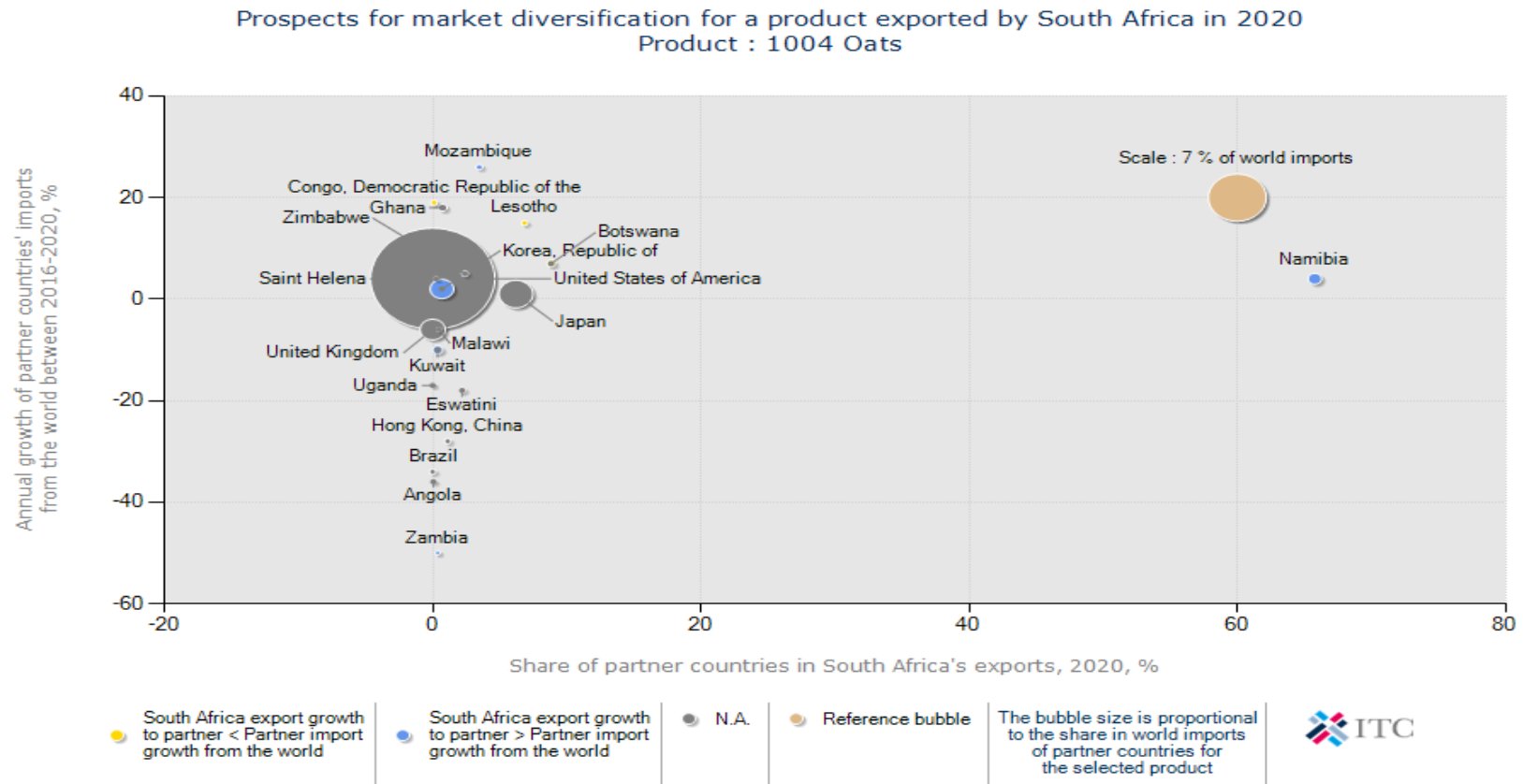
Figure 16 below and Table 6 indicate that South African oats exports to Eswatini increased by 13% and 37% in value and volume respectively between the years 2016 and 2020. On the other hand, oats exports to Eswatini declined by 19% in value and 24% in volume over the same period.

Figure 16: Growth in Demand for Oats Exports from South Africa in 2020



Source: ITC Trade Map

Figure 17: Prospects for diversification of oats exported by South Africa in 2020



Source: ITC Trade Map

Figure 17 above indicates that Namibia, Botswana and Lesotho command the greatest share of South Africa's total oats exports to the rest of the world followed by Lesotho, Korea Republic and Zambia. In 2020, Namibia alone absorbed about 65.8% of South Africa's total oats exports (in value terms) while Botswana and Lesotho were destinations for 8.8% and 6.9% shares of South Africa's total oats exports, respectively. If South Africa wishes to diversify its oats exports, the lucrative prospective markets exist in Zambia, Angola, Brazil and China. These countries have remained stable in terms of oats imports from the world over the past few years, but South Africa has not fully exploited the opportunities that exist in these Markets.

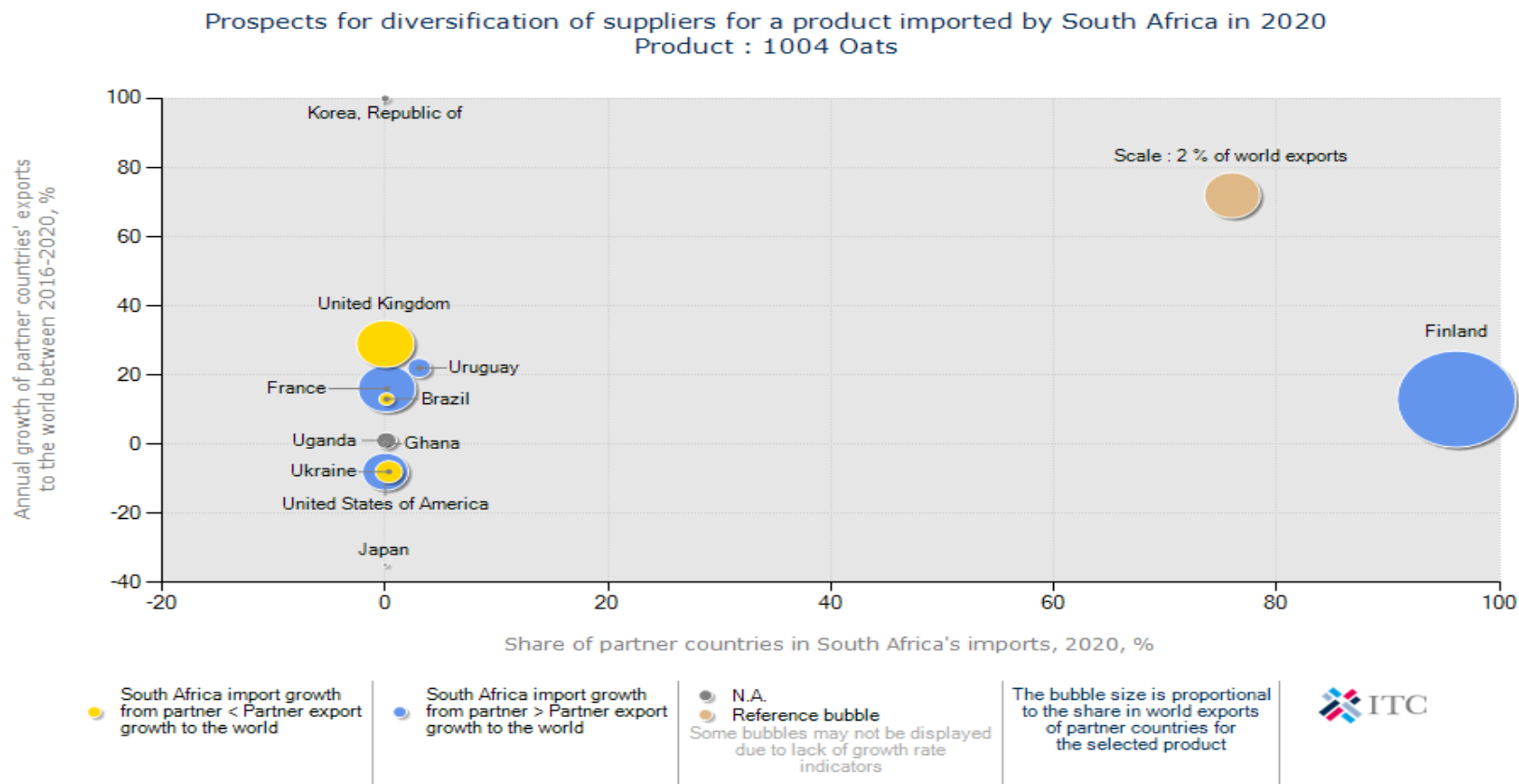
Table 7: List of supplying markets for the oats imported by South Africa in 2020

Exporters	Imported value 2020 (USD thousand)	Share in South Africa's imports (%)	Imported quantity 2020 (Tons)	Unit value (USD/unit)	Imported growth in value between 2016-2020 (% p.a.)	Imported growth in quantity between 2016-2020 (% p.a.)	Imported growth in value between 2019-2020 (% p.a.)
World	8165	100	30770	265	31	29	43
Finland	7849	96.1	30047	261	212	36	46
Uruguay	250	3.1	560	446	77	87	-5
Ukraine	28	0.3	106	264	-9	14	0
France	13	0.2	4	3250	294	0	606
Brazil	12	0.1	25	480	-37	-31	-80

Source: ITC Trade Map

Table 7 and Figure 18 indicate that Finland, Uruguay, Ukraine and France were the major exporters of oats to South Africa during the year 2020. Consequently, both the table and the figure indicate that South Africa imported about 30 770 volumes of oats in 2020. About 96.1% of this originates from Finland while approximately 3.1% was procured from Uruguay. South Africa's oats import from the world increased by 31% and 29% in value and quantity respectively. Imports from Finland increased by 212% and 46% during the same period.

Figure 18: Prospects for diversification of suppliers for oats imported by South Africa in 2020



Source: ITC Trade Map

4. SUMMARY OF OATS STOCKS

Table 8: Oats supply and demand situation ('000 t)

Marketing Season (01 Oct – 30 Sep)	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	Mean
Opening stock (1 Oct)	22.9	13.0	29.2	27.9	10.7	18.3	15.3	27.6	22.7	15.3	20.7
Prod deliveries	34.0	66.0	56.7	24.6	23.9	38.5	55.6	22.9	33.3	15.7	38.6
Imports	15.1	10.6	11.0	19.5	45.3	30.2	24.2	38.6	23.5	61.6	24.8
Surplus	0.3	0.6	7.4	0.0	0.0	0.6	0.2	26.8	0.0	0.0	3.7
Available	72.3	90.2	104.3	52.5	79.9	87.6	95.4	89.5	79.9	92.6	83.2
Processed	44.6	45.0	51.0	12.1	50.5	61.9	59.4	61.1	60.5	62.6	47.3
-human	41.5	41.2	43.8	10.4	45.8	49.3	45.6	47.7	48.2	50.5	40.3
-animal	3.1	4.5	7.9	1.7	4.7	12.7	13.7	13.5	12.3	12.2	7.2
-bio-fuel	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Withdrawn by producers	3.8	5.7	7.3	4.5	3.2	0.4	0.4	0	0	0	3.3
Released to end-consumers	6.3	8.2	6.2	0.5	3.1	2.1	1.3	6.3	0.0	0.0	4.2
Seed for planting purposes	4.0	3.3	3.5	0.5	3.4	6.4	6.5	4.6	3.4	4.6	4.2
Net receipts(-)/disp (+)	0.3	0.1	0.8	0.0	0.7	0.7	0.1	2.2	0.0	0.0	0.5
Deficit	0.0	0.6	0.7	0.2	0.4	0.0	0.0	0.0	0.0	0.0	0.2
Exports	0.2	0.1	0.0	0.0	0.1	0.1	0.0	1.9	0.0	0.2	0.3
Utilized	58.6	62.4	68.9	13.6	61.4	72.1	67.6	66.7	64.4	67.8	60.4
Closing Stock (30 Sep)	13.7	29.2	27.8	39.0	18.3	15.3	27.6	22.7	15.6	24.8	23.4

Source: SAGIS

According to Table 8 above, the local oats producers are currently capable of supplying an average of about 38.6 thousand tons of oats to the market per annum. This is not sufficient to meet the local demand as the domestic processing is estimated at an average of 47.3 thousand tons per annum. The existing deficit is matched through imports originating mainly from Finland, Uruguay, Ukraine and France. On average, South Africa imports about 24.8 thousand tons of oats annually making the total average volumes available for the year 2019/20 to be about 83.2 thousand tons. The closing stock for 2019/20 marketing season was 24.8 thousand tons and this is slightly higher compared to a ten-year average of 23.4 thousand tons. It is also clear from Table 8 that about 85.2% of the total oats processed locally is used for human consumption while only 15.2% goes to animal feed industry.

5. ACKNOWLEDGEMENTS

The following organizations are acknowledged:

South African Grain Information Service

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ITC Market Access Map

Website: [http://www.macmap.org/South Africa](http://www.macmap.org/South%20Africa)

ITC Trade Map

Website: <http://www.trademap.org>

USDA Foreign Agricultural Service

Website: www.fas.usda.gov

[FAO Statistics](#)

Website: www.fao.org

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