



ANNUAL REPORT JAARVERSLAG



CONTEXT KONTEKS

Viewed holistically, 2018/2019 was a less positive political and agricultural year. The hands that break a dry clot reflect the harsh reality of a countrywide drought, emotional turmoil and people in agriculture's distress at more than one level. In the midst of these turbulent conditions, Grain SA has consistently endeavoured to provide small but purposeful steps – and to continue to be a colourful beacon of hope and steadfastness for producers.

Oorhoofs gesien was 2018/2019 'n minder positiewe politieke en landboujaar. Die hande wat 'n droë kluit oopbreek weerspieël die harde werklikheid van 'n landswye droogte, emosionele gelaaidheid en mense in landbou se vuisvoosheid op meer as een vlak. Te midde van dié onstuimige omstandighede het Graan SA deurentyd gepoog om klein, maar doelgerigte treë te gee – en om steeds 'n kleurvolle baken van hoop en standvastigheid vir produsente te wees.

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Overview Oorsig

VISION

Grain SA provides commodity strategic support and services to South African grain producers to support sustainability.

VISIE

Graan SA voorsien kommoditeitstrategiese ondersteuning en dienste aan Suid-Afrikaanse graanprodusente om volhoubaarheid te verseker.

GRAIN ECONOMY AND MARKETING | GRAANEKONOMIE EN BEMARKING



Strategic focus | Strategiese fokus

Sustainable production

Volhoubare produksie

Promotion of market information

Bevordering van markinligting

Monitoring of inputs

Monitering van insette

Expansion and development of markets

Uitbreiding en ontwikkeling van markte

Influencing grain policy aspects

Beïnvloeding van graanbeleid-aspekte

Enhancing integrated communication activities and innovative and consistent information sharing

Bevordering van geïntegreerde kommunikasie-aksies en die innoverende en konstante deel van inligting

GRAIN RESEARCH AND POLICY CENTRE | GRAANNAVORSING EN BELEIDSENTRUM

Facilitate and co-ordinate grain and oilseed research and policy matters

Fasiliteer en koördineer graan- en oliesadenavorsing en beleidsake



Co-ordinate and link key stakeholders

Koördineer en verbind sleutel-belanghebbendes

Create a platform for interaction

Skep 'n platform vir interaksie

Facilitate the role-out of projects

Fasiliteer die uitrol van projekte

FARMER DEVELOPMENT | LANDBOU-ONTWIKKELING

Goals of the programme | Mispunte van die program



To be leaders in true development and transformation

Om leiers te wees in ware ontwikkeling en transformasie



Improve farming skills through training and mentoring

Verbeter boerdery-vaardighede deur opleiding en mentorskap



Facilitate access to affordable modern production inputs

Fasiliteer toegang tot bekostigbare, moderne produksie-insette



Coach farmers to attain higher yields

Lei boere op om hoër opbrengste te realiseer



Increase and improve land use

Verhoog en verbeter grondgebruik



Stimulate the rural economy

Stimuleer die landelike ekonomie



Give opportunity for self-employment and job creation

Skep die geleentheid vir persoonlike en ander werkskepping



Increase crop production

Verhoog graanproduksie

COMMODITIES | KOMMODITEITE



MAIZE
MIELIES



WHEAT
KORING



SOYBEANS
SOJABONE



CANOLA
KANOLA



SUNFLOWER
SONNEBLOM



SORGHUM
SORGHUM



BARLEY
GARS



GROUNDNUTS
GRONDBONE

Executive Hoofbestuur



FRONT/VOOR

Kallie Schoeman
REGION 9
STREEK 9

Jaco Breytenbach*
REGION 19
STREEK 19

Chris Schoonwinkel*
REGION 21
STREEK 21

Jannie de Villiers*
CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER

Jaco Minnaar*
CHAIRPERSON
VOORSITTER

Ramodisa Monaisa*
VICE-CHAIRPERSON
VISEVOORSITTER

Jeremia Mathebula*
REGION 29
STREEK 29

Richard Krige*
REGION 27
STREEK 27

Preline Swart
REPRESENTATIVE: FARMER DEVELOPMENT
VERTEENWOORDIGER:
LANDBOU-ONTWIKKELING

Alfreda Mars
REGION 30
STREEK 30

MIDDLE/MIDDEL

Israel Motlhabane
REGION 31
STREEK 31

Paul Corver
REGION 17
STREEK 17

Stephen Krüger
REGION 23
STREEK 23

Marnus Bothma
REGION 1
STREEK 1

André Kirsten
REGION 26
STREEK 26

Sarel Haasbroek
REGION 7
STREEK 7

Ryk Pretorius
REGION 10
STREEK 10

Willie Marais
REGION 22
STREEK 22

Michel Gildenhuys
REGION 32
STREEK 32

Ralf Küsel
REGION 14
STREEK 14

Danie Reichel
REGION 4
STREEK 4

Gerrit Roos
REGION 11
STREEK 11

BACK/AGTER

Jan George Pretorius
REGION 5
STREEK 5

Gerhard Bruwer
REGION 25
STREEK 25

Joseph Swanepoel
REGION 8
STREEK 8

Neil Claassen
REGION 18
STREEK 18

Marius Groenewald
REGION 20
STREEK 20

Jozeph du Plessis
REGION 2
STREEK 2

Rudolf Fourie
REGION 12
STREEK 12

Danie Minnaar
REGION 24
STREEK 24

Paul Zietsman
REGION 15
STREEK 15

Patrick Stuurman
CO-OPTED
GEKOÖPTEER

Deon Bergh
REGION 3
STREEK 3

ABSENT/AFWESIG

Derek Mathews*
VICE-CHAIRPERSON
VISEVOORSITTER

Niël Rossouw
REGION 6
STREEK 6

Willem Groothof
REGION 13
STREEK 13

Jaap van der Westhuizen
REGION 16
STREEK 16

Ramoso Pholo
REGION 28
STREEK 28

* Management Committee
* Dagbestuur

Message from the Chairperson Boodskap van die Voorsitter

High-calibre producers trump exceptional circumstances

Sustainable grain and oilseed production forms the core focus of Grain SA's activities. The organisation as a collective serves as mouthpiece and negotiator with all role-players on behalf of producers to the benefit of the grain industry. This annual report reflects the way in which Grain SA once again carried out its task in this regard in an excellent manner.

Grain SA had to fulfil the above responsibilities within a complex agricultural environment filled with variables and making enormous demands on the South African producer. One variable in particular was the excessively varying climatic conditions, which pose a significant threat to food security in South Africa. It is therefore essential for the sector to continuously adapt its management and production practices to these conditions to limit the vulnerability of agriculture. In order to ensure sustainability, producers must do everything possible to mitigate and minimise their risks. This process requires knowledge and insight, and also the realistic acceptance that there are few safety nets.

A producer must therefore reflect with great insight and knowledge on the basis of the most recent research information, technology and production methods on which agricultural practices will in future work the best on their land. Unfortunately, there is no room for error. This process requires knowledge and insight, and also the realistic acceptance that there are few safety nets.

South African producers are repeatedly cited by international role-players as among the best in the world, despite the exceptional circumstances in which they farm. Special acknowledgement is also given to the fact that our producers are regarded as the leaders in employing the latest technology.

Unlike their peers in other countries, South African producers also find themselves in an agricultural environment that is characterised by several non-favourable policy issues, including uncertainty with regard to land ownership and the lack of tariff protection against global competitors. However, thanks to the calibre of our producers, it is noteworthy that they – highly valued for their resourcefulness and perseverance – can still succeed in consistently producing the highest quality of food at cost-efficient prices and exporting large quantities of their products.

To Grain SA it is therefore important that its members have the reassurance and confidence that the organisation, with its strong brand and effective management, works with dedication and zeal to ensure a stable production environment that is also characterised by policy certainty. This enables the producers to focus on their primary function, namely food production.

It goes without saying that if the leadership style of an agricultural organisation does not instill confidence, it will lose members, which can harm its influence as a directive role-player. Grain SA is grateful that our support at grassroots level is increasing and that the membership is growing. This is regarded as proof of the confidence in and recognition of the impact this organisation has as a seminal

Hoë kaliber produsente troef buitengewone omstandighede

Volhoubare graan- en oliesadeproduksie vorm die kernfokus van Graan SA se werksaamhede. As 'n kollektiewe geheel dien die organisasie as spreekbuis en onderhandelaar namens produsente met alle rolspelers tot voordeel van die graanbedryf. Hierdie jaarverslag is 'n refleksie van die wyse waarop Graan SA in dié verband hom weer eens uitstekend van sy taak gekwyt het.

Graan SA moes bogenoemde verantwoordelikhede nakom binne 'n komplekse landbou-omgewing vol veranderlikes en wat groot eise aan die Suid-Afrikaanse produsent stel. Een veranderlike in besonder is die uitermatige wisselende klimaatstoestande wat 'n wesenlike bedreiging vir voedselsekerheid in Suid-Afrika inhou. Dit is gevolglik noodsaaklik dat die sektor sy bestuurs- en produksiepraktyke op 'n deurlopende grondslag hierby moet aanpas om die kwesbaarheid van landbou te kan beperk. Ten einde volhoubaarheid te verseker, moet produsente alles in hulle vermoë doen om hul risiko te mitigeer en beperk. Die proses vereis kennis en insig en ook die realistiese aanvaarding dat daar weinig vangnette bestaan.

'n Produsent moet gevolglik met groot insig en kennis aan die hand van die nuutste navorsingsinligting, tegnologie en produksiemetodes besin oor watter toekomstige landboupraktyke die beste op sy/haar grond sal werk. Daar is ongelukkig geen ruimte om foute te maak nie. Dit vereis kennis en insig en ook die realistiese aanvaarding dat daar weinig vangnette bestaan.

Suid-Afrikaanse produsente word by herhaling deur internasionale rolspelers uitgelig as van die beste ter wêreld ondanks die buitengewone omstandighede waaronder geboer word. Spesiale erkenning word ook gegee aan die feit dat ons produsente as die voorlopers in die aanwending van die nuutste tegnologie beskou word.

In teenstelling met hulle eweknieë in die buiteland bevind produsente hulself boonop ook in 'n landbou-omgewing wat gekenmerk word deur verskeie nie-bevorderlike beleidsaangeleenthede waaronder onsekerheid rondom grondbesit en die gebrek aan tariefbeskerming teen wêreldwye mededingers. Danksy die kaliber van ons produsente is dit egter merkwaardig dat hulle, wat so hoog aangeslaan word vir hul vindingrykheid en deursettingsvermoë, steeds daarin slaag om konsekwent voedsel van die hoogste gehalte te produseer teen koste-effektiewe pryse en waarvan groot hoeveelhede uitgevoer word.

Vir Graan SA is dit dus belangrik dat sy lede die gerusstelling en vertroue moet hê dat die organisasie, met sy sterk handelsnaam en effektiewe bestuur, homself met toewyding en erns beywer vir 'n stabiele produksie-omgewing wat ook gekenmerk word deur beleidsekerheid. Sodoele stel dit produsente in staat om op hulle primêre funksie naamlik voedselproduksie te fokus.

Dit is vanselfsprekend dat indien 'n landbou-organisasie se leierskapstyl nie vertroue inboesem nie dit tot 'n verlies aan lede kan lei, wat sy invloed as rigtinggewende rolspeler kan benadeel. Graan SA is egter dankbaar dat ons ondersteuning op grondvlak toeneem en die ledetal groei. Dit word beskou as 'n bewys van vertroue en erkenning vir die impak wat dié organisasie as invloedryke rolspeler in landbou uitoefen ten einde ons



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CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER

role-player in agriculture in order to focus on our producers' priorities and help to improve their financial position and sustainability.

We as the leaders of the organisation decided not to isolate and try to protect ourselves, but rather to follow a policy of reaching out and collaborating. This rendered considerable dividends, and led to sound communication channels being established with the government, state departments and other stakeholder institutions. In this way, various bottlenecks could be addressed and resolved.

Grain SA will also continue to state the producer's case and defend it to political and business leaders and wider society with respect to the draconian policy direction of expropriation of property without compensation. It is a well-known fact that Grain SA plays a prominent role in the actions of commercial agriculture in opposing this policy.

The organisation will continue to reach out to the government and provide assistance to establish more producers in a sustainable manner, as Grain SA is committed to transformation and land reform in an orderly and sustainable manner, within the parameters of the current Constitution. The successes we have already achieved in this regard are proof of our commitment and dedication.

It goes without saying that the continued status and trust Grain SA enjoys in the sector must be attributed to its extremely competent and dedicated personnel. Under the competent leadership of Jannie de Villiers and his management team, they form the backbone of an exceptional and successful organisation and are invaluable to the grain industry.

A special word of gratitude to Grain SA's Management Committee and Executive for their dedication, positive attitude and ability to find solutions at all times. There are few agricultural organisations with the calibre of leadership you offer.

Finally, I pray for the Father to bless every member of Grain SA in the coming year.

Jaco Minnaar
CHAIRPERSON
VOORSITTER

produsente se prioriteite op die voorgrond te plaas en hulle finansiële posisie en volhoubaarheid te help verbeter.

Ons as leierskap van die organisasie het besluit om nie laer te trek en onself te probeer beskerm en sodoende te isoleer nie, maar eerder 'n beleid van uitreik en samewerking te volg. Dit het aansienlike dividende gelewer en het daartoe gelei dat goeie kommunikasiekanale met die regering, staatsdepartemente asook ander belanghebbende instansies gevestig is. Sodoende kon verskeie knelpunte aangespreek en opgelos word.

Graan SA sal ook onverpoos voortgaan om die saak van die produsent te stel en te verdedig by politieke en besigheidsleiers asook die breër samelewing ten opsigte van die drakoniese beleidsrigting van onteining van eiendom sonder vergoeding. Dit is dan ook welbekend dat Graan SA prominent vertoon in kommersiële landbou se teenaksies in dié verband.

Die organisasie sal voortgaan om na die regering uit te reik en hulp te verleen om meer boere op 'n volhoubare wyse te vestig, aangesien Graan SA verbind is tot transformasie en grondhervorming op 'n ordelike en volhoubare wyse, binne die parameters van die huidige Grondwet. Die suksesse wat ons reeds behaal het hiermee is 'n bewys van ons verbintenis en toewyding.

Dit is vanselfsprekend dat die volgehoue aansien en vertroue wat Graan SA in die sektor geniet, toegeskryf moet word aan sy uiters bevoegde en toegewyde personeel. Onder die bekwame leierskap van Jannie de Villiers en sy bestuurspan vorm hulle die ruggraat van 'n merkwaardige en suksesvolle organisasie en is van onskatbare waarde vir die graanbedryf.

'n Besondere woord van dank aan Graan SA se Dagbestuur en Hoofbestuurslede vir hulle toegewydeheid, positiewe ingesteldheid en vermoë om altyd 'n oplossings te soek. Daar is min landbou-organisasies met die kaliber leierskap wat julle bied.

Ten slotte wens ek die Vader se mildelike seën toe vir elke lid van Graan SA in die seisoen wat voorlê.

Chief Executive Officer's review and strategic objectives

Uitvoerende Hoofbestuurder se terugblik en strategiese oogmerke

A difficult year, but still one that helped to build strength

After another tough year in agriculture, grain and oilseeds producers are currently under great financial pressure as a result of the ongoing drought and irregular climatic conditions during the past five production cycles. Low international grain prices have also placed a further damper on the profitability of the grain producer.

Consequently, producers have major carryover debt and negative cash flow scenarios that limit credit opportunities and financial sustainability. The political climate, which includes the debate on land reform and wrangling about the control of trust funds, unfortunately also did not benefit agriculture.

However, producers can be reassured by the fact that various successful actions promoting the grain industry were undertaken and completed by Grain SA during the reporting period up to September 2019. The Grain SA team is grateful that we were able to spend considerable time at grassroots level in a very difficult period for our members.

SUCCESSES

Financial statements

Despite a challenging year, Grain SA again reported steady financial results. Members will note that our finances are positive and that Grain SA has once again received an unqualified audit.

TURNAROUND STRATEGY FOR WHEAT

After almost two years of negotiations the Wheat Forum has reached consensus on new specifications for grading and on the price differences between the different grades. A large quantity of grain that is delivered now falls in the new super-grade specification because of high protein levels. This means that producers earn a premium of 2% above the Safex wheat price.

These positive changes in a dry season support producers and sustainable food production.

BARLEY CROP

Due to climatic conditions, the barley crop produced a lower yield and quality. A new concession, namely that a greater part of the crop may be accepted as malt barley, was consequently negotiated with AB InBev by Grain SA. The impact of the significantly lower price for feed barley was therefore reduced.

Research contracts

Medium-term contracts were signed by Grain SA and the Department of Science and Innovation, signifying a major investment by the government in research for the grain and oilseeds industry. The progress of the wheat breeding consortium highlights the value of collaboration between the government and the agricultural research initiatives facilitated by Grain SA.

Significant progress has been made by research consortiums. Crop protection challenges were underlined by the occurrence of and losses attributed to Sclerotinia infection, and a focused team was appointed

'n Moeilike jaar, maar tog een wat spierkrag help bou het

Na nog 'n strawwe jaar in landbou is graan- en oliesadeprodusente tans onder groot finansiële druk as gevolg van die voortgesette droogte en onreëlmatige klimaatstoestande die afgelope vyf produksiesiklusse. Lae internasionale graanpryse het ook 'n verdere skaduwee oor die winsgewendheid van die graanprodusent laat val.

Produsente ondervind gevolglik groot oordragsskuld met negatiewe kontantvloeienscenario's wat kredietgeleenthede en finansiële volhoubaarheid beperk. Die politieke klimaat, waaronder die debat oor grondhervorming en 'n tontrekkery oor die beheer van trustfondse, was ongelukkig ook nie bevorderlik vir die landbouklimaat nie.

Produsente kan egter bemoediging daarin vind dat daar in die verslagtydperk tot September 2019 verskeie suksesvolle aksies ter bevordering van die graanbedryf deur Graan SA onderneem en afgehandel is. Die Graan SA-span is dankbaar dat ons baie tyd op grondvlak kon spandeer in 'n tyd wat dit werklik moeilik gaan met ons lede.

SUKSESSE

Finansiële state

Ten spyte van 'n uitdagende jaar het Graan SA weer eens bestendige finansiële resultate getoon. Lede kan kennis neem dat ons finansies positief vertoon en dat Graan SA weer 'n ongekwalifiseerde oudit ontvang het.

OMDRAAISTRATEGIE VIR KORING

Na bykans twee jaar van onderhandelings het die Koringforum konsensus bereik oor nuwe spesifikasies vir die gradering asook oor die prysverskille tussen die verskillende grade. 'n Groot hoeveelheid graan wat gelewer word, val nou binne die nuwe supergraad spesifikasie, danksy hoë proteïenvlakke. Dit het tot gevolg dat produsente 'n premie van 2% bo die Safex-koringprys verdien.

Hierdie positiewe veranderinge in 'n droë seisoen is ondersteunend vir produsente en volhoubare voedselproduksie.

GARSOES

Die garsoes het weens klimaatomstandighede 'n swakker opbrengs en kwaliteit gelewer. Gevolglik is 'n nuwe toegewing, dat 'n groter deel van die oes as moutgars ingeneem kon word, deur Graan SA met AB InBev beding. Die impak van die noemenswaardige laer prys van voergars is gevolglik verminder.

Navorsingskontrakte

Mediumtermyn-kontrakte is tussen Graan SA en die Departement van Wetenskap en Innovasie onderteken wat 'n groot belegging deur die regering in navorsing vir die graan- en oliesadebedryf beteken. Die koringteelkonsortium se vordering toon die waarde van samewerking tussen die regering en die landbounavorsingsinisiatiewe deur Graan SA gefasiliteer.

Beduidende vordering is gemaak met navorsingskonsortiums. Gewasbeskermingsuitdagings is uitgelig deur die voorkoms en verliese wat aan Sclerotinia-infeksie toegeskryf is en 'n gefokusde span is saamgestel om



Dr Dirk Strydom

MANAGER: GRAIN ECONOMY
AND MARKETING

BESTUURDER: GRAANEKONOMIE
EN BEMARKING



Dr Marinda Visser

MANAGER: GRAIN RESEARCH
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BESTUURDER: GRAANNAVORSING
EN BELEIDSENTRUM



Nico Vermaak

MANAGER: CORPORATE SERVICES

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Jannie de Villiers

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Jane McPherson

MANAGER: FARMER DEVELOPMENT

BESTUURDER: LANDBOU-ONTWIKKELING



Christa Herbst

MANAGER: FINANCIAL SERVICES

BESTUURDER: FINANSIËLE DIENSTE



Susari Teubes

SECRETARY TO THE CEO

SEKRETAAR VAN DIE HUB

to investigate management strategies. Consultations were held with stakeholders to gather knowledge and identify strategic priorities for future research initiatives.

Research on army worms was continued and the government and industry are involved in ongoing consultations in this regard, and on biosecurity issues. The race to establish a vibrant breeding system must be accelerated. Several postgraduate bursaries for new research projects were therefore launched to further investigate the short- and medium-term effects of climate change on grain production.

Location differential

At the request of Grain SA an investigation into the ongoing issues pertaining to the location differential for white and yellow maize was launched and completed by the JSE. Grain SA made various proposals and is still awaiting certain decisions.

SAVINGS PLAN

In collaboration with Corporate Guarantee, a programme was developed to provide our members with a unique benefit. According to this programme, producers can deposit their profits in a savings plan and thus also apply effective tax management. The plan supports producers in utilising funds in cycles when they experience financial pressure, without harming growth and cash flow.

SAFEX TRAINING

In the past financial year Grain SA offered various Safex training sessions for producers and other role-players in agriculture. No fewer than 60 developing farmers received the same training as commercial producers. This emphasises Grain SA's approach that developing farmers must be trained in more than just technical production knowledge.

IT SYSTEM

An extensive upgrade of Grain SA's information technology system has been completed. Software was upgraded and security was improved.

bestuurstrategieë te ondersoek. Konsultasies met belanghebbendes is ook gehou om kennis in te samel en strategiese prioriteite vir toekomstige navorsingsinisiatiewe te identifiseer.

Navorsing oor kommandowurm is voortgesit en die regering en die bedryf hou voortdurend samesprekings daaroor, asook oor biosekuriteits-aangeleenthede. Die wedloop om 'n veerkragtige teelstelsel te bekom, moet versnel word. Derhalwe is verskeie na-graadse beurse vir nuwe navorsingsprojekte van stapel gestuur om die kort- en mediumtermyn-effek van klimaatsverandering op graanproduksie verder te ondersoek.

Liggingsdifferensiaal

Op versoek van Graan SA het die Johannesburgse Effektebeurs (JSE) 'n ondersoek na die voortslepende knelpunte van die liggingsdifferensiaal op wit- en geelmielies en koring-termynkontrakte geloods en afgehandel. Graan SA het verskeie voorstelle gemaak en ons wag nog vir sommige besluite.

SPAARPLAN

'n Program is in samewerking met Corporate Guarantee ontwikkel wat aan ons lede 'n unieke voordeel bied. Hiervolgens kan produsente hul winste in 'n spaarplan plaas en sodoende ook doeltreffende belastingbestuur toepas. Die plan ondersteun produsente om fondse te benut in siklusse wanneer daar finansiële druk ervaar word, sonder om groei en kontantvloei te benadeel.

SAFEX-OPLEIDING

Die afgelope finansiële jaar het Graan SA verskeie Safex-opleidingsessies vir produsente en verskeie rolspelers in die landbou aangebied. Nie minder nie as 60 ontwikkelende boere het dieselfde opleiding as kommersiële produsente ondergaan. Dit onderstreep Graan SA se benadering dat ontwikkelende boere in meer as net tegniese produksiekennis opgelei moet word.

IT-STELSEL

'n Omvattende opgradering aan Graan SA se inligtingstegnologiesistelsel is afgehandel. Sagteware is opgegradeer en sekuriteit is verbeter.

The information technology system provides an extremely important function in serving our members.

Financing for black farmers

Grain SA came up with the initiative to make an amount available to serve as security to help unlock financing for potential black commercial farmers who are members of our development programme.

This money was obtained from funds that had accumulated over a number of years and that were earmarked for the development of producers. Strict criteria apply to ensure that applicants have the ability to repay their loans.

This money will not be used to finance producers, but will be made available as surety or collateral for producers applying for financing with financing institutions.

Despite numerous teething problems, we hope that the initiative will grow and inspire others to become involved.

Farmer Development Programme

Grain SA's Farmer Development Programme was managed very successfully this year.

A total of 5 382 meetings with study groups were held across the country. In addition, 41 farmer days were held and 41 470 training courses were presented to 6 986 agriculturists. Furthermore, 16 demonstration trials were planted and 28 programme members participated in the Farmer of the Year competition. Visits were made to 798 farms and 316 schools, and 17 resident students were accommodated.

Grain Academy

The responsibility of the broad vision and strategic-objective programme of Grain SA as a commodity organisation is also supported by the Grain Academy. This development opportunity was successfully offered to 26 young agriculturists for the seventh consecutive year. A reunion for all alumni was also held in Pretoria.

This investment in our young leaders in agriculture received so much well-deserved recognition that it will be expanded to the wider agricultural sector from 2020.

COMMERCIAL ACTIVITIES

The commercial activities of Grain SA not only retained positive momentum this year, but were expanded to the benefit of the sustainability of the organisation. This has the advantage that our members are not placed under additional financial pressure in difficult circumstances.

As tradition dictates, hard work again triumphed and the NAMPO Harvest Day was once more a great success, with 81 345 visitors and 775 exhibitors who concluded business despite the current general economic pressure.

A successful NAMPO Cape hosted 20 250 visitors over a period of three days, and positive feedback was received from exhibitors about successful business transactions.

The official mouthpiece of the organisation, *SA Graan/Grain*, is performing very well, in spite of extremely difficult economic conditions.

Staff

The commitment of Grain SA's staff to promoting the organisation's strategic objectives and their pursuit of good relations with members and other role-players in the agricultural value chain, and with the government, deserve to be commended.

As we pursue the ongoing development and empowerment of all staff, various training opportunities and courses were offered to staff. Some of the staff also received training in trauma counselling in order to communicate effectively with members who have experienced trauma. We are proud of the fact that Grain SA has a very stable staff base.

Die inligtingstegnologie-stelsel bied 'n uiters belangrike funksie vir die bediening aan ons lede.

Finansiering vir swart boere

Graan SA het met die inisiatief na vore gekom om 'n bedrag beskikbaar te stel om as sekuriteit te dien om swart, Potensiële Kommersiële boere, wat lede van ons ontwikkelingsprogram is, te help om finansiering te ontsluit.

Dié geld is bekom uit fondse geoormerk vir die ontwikkeling van boere en wat oor 'n aantal jare opgehoop het. Streng kriteria geld om te verseker dat aansoekers die vermoë het om hul lenings te betaal.

Hierdie geld sal nie gebruik word om boere te finansier nie, maar sal as borg of kollateraal beskikbaar gestel word vir dié wat aansoek doen om finansiering by finansieringsinstellings.

Ten spyte van baie tandekryprobleme, hoop ons dat die inisiatief sal groei en ander inspireer om betrokke te raak.

Landbou-ontwikkelingsprogram

Graan SA se Landbou-ontwikkelingsprogram is vanjaar met groot sukses bestuur.

'n Totaal van 5 382 vergaderings is landwyd met studiegroepe gehou. Daar is ook 41 boeredae gehou en 41 470 opleidingskursusse is vir 6 986 landbouers aangebied. Verder is daar 16 demonstrasieproewe aangeplant en 28 programlede het aan die Boer van die Jaar-kompetisie deelgeneem. Besoeke is gebring aan 798 plase en 316 skole en 17 inwonende studente is geakkommodeer.

Graanakademie

As 'n kommoditeitsorganisasie word die verantwoordelikheid van ons uitgebreide visie en strategiese doelwitprogram ook deur die Graanakademie ondersteun. Dié ontwikkelingsgeleentheid is vir die sewende agtereenvolgende jaar suksesvol vir 26 jong landbouers aangebied. 'n Reünie vir alle alumni is ook in Pretoria gehou.

Hierdie belegging in ons jong landbouleiers het soveel welverdiende erkenning ontvang dat dit van 2020 af na die breër landbousektor uitgebrei word.

KOMMERSIËLE AKTIWITEITE

Die kommersiële aktiwiteite van Graan SA het vanjaar nie net die positiewe momentum behou nie, maar is ook verder uitgebrei ten bate van die volhoubaarheid van die organisasie. Dit hou die voordeel in dat ons lede tydens moeilike omstandighede nie onder addisionele finansiële druk geplaas word nie.

Soos die tradisie homself gestand hou, het harde werk weer eens geseëvier en was die NAMPO Oesdag 'n groot sukses met 81 345 besoekers en 775 uitstallers wat besigheid gedoen het ondanks die huidige algemene ekonomiese druk.

'n Suksesvolle NAMPO Kaap het oor 'n tydperk van drie dae 20 250 besoekers gehuisves en positiewe terugvoer is van uitstallers ontvang oor suksesvolle saketransaksies.

Die organisasie se amptelike spreekbuis, *SA Graan/Grain*, presteer baie goed ten spyte van baie moeilike ekonomiese toestande.

Personeelspan

Graan SA personeellede se toegewydheid aan die bevordering van die organisasie se strategiese doelwitte en hul strewe na goeie verhoudinge met lede sowel as met ander rolspelers in die landbou-waardeketting asook die regering, verdien 'n klop op die skouer.

Aangesien ons streef na die deurlopende ontwikkeling en bemagtiging van alle personeel, is verskillende opleidingsgeleenthede vir personeel moontlik gemaak. Van die personeel het ook opleiding in trauma-berading ontvang ten einde effektief met lede wat trauma ervaar het, te kan kommunikeer. Ons is trots daarop dat Graan SA beskik oor 'n stabiele personeelbasis.



Grain Academy alumni of the past seven years.
Die Graanakademie se alumni van die afgelope sewe jaar.

Social responsibility

A shoe project was launched during the 2019 Congress as part of our 'People like us do things like this' initiative. Delegates and guests were asked to donate new or barely used shoes during Congress. In this way, more than 500 pairs of shoes were divided equally among four institutions in the Bothaville district.

The donation of a battery-driven wheelchair provided Uncle Basie Ntsimane, a former executive member, with mobility again after he had lost the full function of his legs. It was a privilege for Grain SA – an organisation that truly cares – to support Uncle Basie in this way, as he had made a major contribution to the Executive and to agriculture over many years.

TRENDS

White maize and soybeans

A positive trend was the new record consumption figures achieved for maize (10,7 million tons processed in 2018/2019) and soybeans (1,3 million tons processed in 2018/2019). Grain SA is confident that this trend will continue in the medium term.

An increase in the planting of soybeans in particular can be expected. South African producers once again produced more than 1 million tons this year. Production will have to reach 1,8 million tons before soybeans need no longer be imported.

Glyphosate

The international agricultural industry is currently under pressure from environmental conservation activists to oppose the use of glyphosate. This trend is focusing increasingly on Africa and it makes red lights flash for South Africa. However, the use of glyphosate cannot be stopped before a workable alternative has been found to ensure sustainable food production.

Corruption

South Africa is currently suffering from the side effects of maladministration and corruption. Grain SA, which is committed to clean administration, is aware that the accompanying ripple effect reflects extremely negatively on institutions and organisations. It is noticeable that this calibre of corruption is moving closer to the grain industry. Grain SA therefore keeps a watchful eye on matters that can have a negative effect on the grain industry at operational level.

Land reform

In the Emakhasaneni court case involving farms in the Melmoth District in KwaZulu-Natal the Land Claims Court created a precedent in its judgment. It was found that neither the Minister of Rural Development nor the Valuer General may ignore the jurisdiction of the courts with regard to compensation for land.

Sosiale verantwoordelikheid

'n Skoenprojek is geloods tydens die 2019-kongres as deel van ons "People like us do things like this"-inisiatief. Afgevaardigdes en gaste is gevra om nuwe of liggebruikte skoene tydens die kongres te skenk. Sodoende is meer as 500 pare skoene eweredig aan vier instansies in die Bothaville-distrik geskenk.

Vir oom Basie Ntsimane, 'n oud-hoofbestuurslid, het die skenking van 'n battery-aangedrewe rystoel aan hom sy mobiliteit terug besorg na hy die volle funksionering van sy bene verloor het. Dit was vir Graan SA – as 'n organisasie wat waarlik omgee – 'n voorreg om oom Basie op die wyse te ondersteun, want hy het oor jare 'n groot bydrae tot die Hoofbestuur en landbou gemaak.

TENDENSE

Witmielies en sojabone

'n Positiewe beweging was die nuwe rekord-verbruiksyfers wat behaal is vir beide mielies (10,7 miljoen ton 2018/2019 verwerk) en sojabone (1,3 miljoen ton 2018/2019 verwerk). Graan SA is vol vertroue dat dié tendens in die mediumtermyn sal voortduur.

Daar kan veral 'n opswaai in die aanplanting van sojabone verwag word. Suid-Afrikaanse produsente het vanjaar weer meer as 1 miljoen ton geproduseer. Produksie sal eers op 1,8 miljoen ton moet staan alvorens daar nie meer sojabone ingevoer hoef te word nie.

Glifosaat

Die internasionale landboubedryf is tans onder druk deur aktiviste vir omgewingsbewaring om die gebruik van glifosaat teen te werk. Hierdie tendens word al hoe meer op Afrika geprojekteer en voorspel rooi ligte vir Suid-Afrika. Die aanwending van glifosaat kan egter nie gestaak word alvorens 'n werkbare alternatief gevind is om volhoubare voedselproduksie te verseker nie.

Korrupsie

Suid-Afrika gaan tans gebuk onder die nuwe-effekte van wanadministrasie en korrupsie. Graan SA, wat homself verbind tot skoon administrasie, is bewus daarvan dat die gepaardgaande rimpeleffek uiters negatief op instellings en organisasies reflekteer. Dit is opmerklik dat dié kaliber korrupsie ook besig is om nader aan die graanbedryf te beweeg. Gevolglik hou Graan SA 'n waaksame oog oor aangeleenthede wat die graanbedryf op bedryfsvlak negatief kan raak.

Grondhervorming

In die Emakhasaneni-hofsak waarby plase in die Melmoth-distrik in KwaZulu-Natal ter sake was, het die Grondeisehof 'n presedent in sy uitspraak geskep. Daar is bevind dat beide die Minister van Landelike Ontwikkeling en die Waardeerder-generaal nie die jurisdiksie van die houe in verband met die vergoeding vir grond kan ignoreer nie.

Ten spyte van die debat oor onteining van grond sonder vergoeding het die regstelsel volstaan by die vereistes in die grondwet ten opsigte van billike vergoeding. Graan SA is via Agri SA finansieel en andersins betrokke by hierdie en ander soortgelyke sake ten einde lede se grondwetlike regte oor grond te beskerm.

Despite the debate on the expropriation of land without compensation the legal system contented itself with the requirements of the Constitution with respect to fair compensation. Through Agri SA, Grain SA is financially and otherwise involved in this and other similar matters in order to protect the constitutional rights of members with respect to land.

UNITY IN THE SECTOR

It is regrettable that unity in agriculture is currently lacking in many respects. An excellent example is the differences of opinion in the joint constitutional revision committee regarding the expropriation of land without compensation, which led to commercial agriculture submitting a minority report. However, Grain SA has remained involved in discussions with various role-players who look after the interests of producers in this regard, and makes inputs on an ongoing basis.

Research capacity

The deterioration of agriculture's traditional research capacity is a source of concern. Together with this, the financial sources from which funding is provided is also shrinking and the number of parties laying claim to the sources is growing.

Priorities will have to be set in the future so that available funds from the various institutions can be allocated optimally and in a co-ordinated manner. Grain SA is therefore increasingly coordinating research and entering into partnerships with academic institutions and organisations that share the mindset of the grain industry in order to accomplish new growth for the future.

In the near future the winter-grains industry will have to rethink statutory funding, because turning over a new leaf seems inevitable.

IN THE NEW YEAR

National Grain Yield Competition

In 2020 Grain SA is taking over the National Grain Yield Competition. A standard protocol will be developed in collaboration with all seed companies. This will ensure that participating grain producers and seed companies are subject to the same criteria.

As an overall, national competition, the competition will create a synergy between the regional competitions of the individual seed companies.

NAMPO ALFA

A new expo will be placed on the agricultural calendar thanks to a decision by Grain SA and ALFA to join forces. It will be known as the NAMPO ALFA Livestock, Hunting and Outdoors Expo and will be housed at NAMPO Park. This step is in response to producers repeatedly expressing a need for such a central expo.

The upgrading of the NAMPO Park facilities and technological capacity is and remains an important priority to Grain SA. Additional investments were made in the past year with respect to the power supply, and an upgrade of the IT capacity is planned for 2020.

Restructuring

Grain SA will have to undergo a process of restructuring in order to comply with new tax legislation. Attention will also have to be given to the way in which the organisation can further promote black economic empowerment in order to make sure that our members are served optimally.

In the greater agricultural family Agri SA is also involved in a process of monitoring and assessing in order to revisit the strategic focus points of the organisation.

EENHEID IN DIE SEKTOR

Dit is betreurenswaardig dat eenheid in landbou tans in baie opsigte ontbreek. 'n Sprekende voorbeeld is die gesamentlike grondwetlike hersieningskomitee se verskille oor die onteiening van grond sonder vergoeding wat daartoe gelei het dat kommersiële landbou 'n minderheidsverslag ingedien het. Graan SA is egter deurlopend betrokke by gespreksvoering met verskeie rolspelers wat na die belange van produsente in dié verband omsien en lewer op 'n deurlopende grondslag insette in die verband.

Navorsingskapasiteit

Die agteruitgang van landbou se tradisionele navorsingskapasiteit is 'n bron van kommer. Hiermee saam, raak die kapasiteit van finansiële bronne waaruit befondsing gedoen word, ook al hoe kleiner en die partye wat daarop aanspraak maak, al hoe groter.

Daar sal in die toekoms geprioritiseer moet word sodat beskikbare fondse van die onderskeie instansies optimaal en gekoördineerd aangewend word. Graan SA is gevolglik toenemend besig om navorsing te koördineer en vennootskappe te sluit met akademiese instellings en organisasies wat die graanbedryf se denkwysse deel om nuwe groei vir die toekoms te bewerk.

In die nabye toekoms sal die wintergraanbedryf oor statutêre befondsing moet herbesin, want dit blyk onafwendbaar dat 'n nuwe blaadjie omgeslaan moet word.

IN DIE NUWE JAAR

Nasionale Graanopbrengskompetisie

Graan SA gaan in 2020 die Nasionale Graanopbrengskompetisie oorneem. Daar sal in samewerking met alle saadmaatskappye op 'n standaardprotokol ooreengekom word. Dit sal verseker dat deelnemende graanprodusente en saadmaatskappye aan dieselfde kriteria onderwerp word.

Die kompetisie sal sodanig wees dat dit as 'n oorhoofse nasionale kompetisie 'n sinergie sal skep tussen individuele saadmaatskappye se streekskompetisies.

NAMPO ALFA

'n Nuwe ekspo gaan op die landboukalender geplaas word danksy 'n besluit deur Graan SA en ALFA om kragte saam te snoer. Dit sal bekend staan as die NAMPO ALFA Lewendehawe, Jag- en Buitelug-ekspo en gehuisves word op NAMPO Park. Gevolglik word daar nou gehoor gegee aan produsente wat al by herhaling hulle behoefte vir sodanige sentrale ekspo uitgespreek het.

Die opgradering van NAMPO Park se fasiliteite en tegnologiese kapasiteit is en bly 'n belangrike prioriteit vir Graan SA. Addisionele beleggings is die afgelope jaar gemaak ten opsigte van elektrisiteitsvoorsiening en opgradering aan die IT-kapasiteit word beplan vir 2020.

Herstrukturering

Graan SA sal 'n proses van herstrukturering moet ondergaan met die doel om te kan voldoen aan nuwe belastingwetgewing. Aandag sal ook geskenk word op welke wyse die organisasie swart ekonomiese bemagtiging meer kan bevorder ten einde seker te maak dat ons lede optimaal bedien word.

In die groter landboufamilie is Agri SA ook midde in 'n proses van monitering en evaluasie ten einde dié organisasie se strategiese fokusse te herbesoek.

Crop insurance

Grain SA is working constantly to negotiate comprehensive, subsidised crop insurance with the government in order to make this more affordable to producers. Together with role-players like Grain SA, the South African Insurance Association (SAIA) has investigated the possibilities and impact of such a system in the South African environment.

A full application compiled in collaboration with international institutions was submitted to the Treasury in June for consideration by the government. A previous application was unfortunately not approved. The current application includes commercial as well as smallholder producers. The application was also sent to the World Bank and the FinMark Trust for review and recommendations.

It is a hopeful sign that the Minister of Agriculture, Land Reform and Rural Development, Thoko Didiza, confirmed in Parliament in August 2019 that the subsidising of crop insurance was in fact being investigated.

CONCLUSION

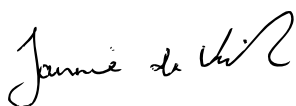
South African producers are recognised internationally as among the best in the world, and form a tough, seasoned and steadfast community. The greater the challenge, the stronger they stand to put food on the tables of the entire country. It is this unshakeable commitment to their task that allows them to survive, regardless of the problems.

We are finalising actions in the present, but at the same time we invest in actions with a view to the long term, and it is important that neither of the two types of action should fail to receive attention. Both types of action will ensure that Grain SA as organisation remains dependable and provides the producer with something constant – in the present as well as in the future.

However, this task cannot be carried out without the support of our members. Grain SA thanks every member for their contribution to this organisation, which plays a critical role in the sustainability of grain production in South Africa.

I also need to acknowledge the Management Committee and the Executive for their steadfastness under prevailing conditions of uncertainty and trial. Planting a tree in whose shadow you will probably never sit yourself is evidence of dedicated leadership. The committed team of staff at Grain SA also deserves special mention for their initiatives to ensure sustainable solutions for the grain producers.

Looking back on the past year one realises afresh that Grain SA was able to bring stability in a challenging climate and agricultural year only through the grace of the Great Planter. And for that we are very grateful.



Jannie de Villiers

CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER

Oesversekering

Graan SA werk onverpoos daaraan om omvattende, gesubsidieerde oesversekering met die staat te beding ten einde dit meer bekostigbaar vir produsente te maak. Tesame met rolspelers soos Graan SA het die Suid-Afrikaanse Versekeringsvereniging (SAIA) ondersoek ingestel na die moontlikhede en impak van so 'n stelsel in die Suid-Afrikaanse omgewing.

'n Volledige aansoek wat saam met internasionale instansies opgestel is, is in Junie by die Tesourie ingedien vir oorweging deur die regering. Daar is reeds voorheen 'n aansoek ingedien wat ongelukkig nie goedgekeur is nie. Die aansoek omvat beide kommersiële en kleinskaalse produsente. Die aansoek is ook aan die Wêreldbank en die FinMark Trust vir resensie en aanbevelings gestuur.

Dit is verblydend dat die Minister van Landbou, Grondhervorming en Landelike Ontwikkeling, Thoko Didiza, in Augustus 2019 in die Parlement bevestig het dat daar wel 'n ondersoek gedoen word rakende die subsidie van oesversekering.

SAMEVATTING

Suid-Afrikaanse produsente word internasionaal erken as van die beste in die wêreld en vorm 'n taai, geharde en standvastige gemeenskap. Hoe groter die uitdaging – hoe sterker staan hulle vas om kos vir die hele land op die tafel te sit. Dit is hierdie onwrikbare toewyding aan hulle taak wat hulle laat oorleef, al gaan dit ook hoe moeilik.

Ons is gelyktydig besig met die afhandeling van aksies in die hede maar ons belê ook in aksies met die oog op die lang termyn en dit is belangrik dat nie een van die twee agterweë gelaat word nie. Beide aksies sal verseker dat Graan SA as organisasie behoudend sal bly en aan die produsent in die hede sowel as in die toekoms 'n konstante sal bied.

Hierdie taak kan egter nie verrig word sonder die ondersteuning van ons lede nie. Dankie aan elke lid vir sy/haar bydrae tot hierdie organisasie wat 'n kritiese rol speel in die volhoubaarheid van graanproduksie in Suid-Afrika.

Ek het ook 'n behoefte om die Dag- en Hoofbestuur erkenning te gee vir hul rigtingvastheid in die heersende tye van onsekerheid en beproewing. Om 'n boom te plant in wie se skaduwee jy waarskynlik nooit self gaan sit nie, spreek van toegewyde leierskap. Die toegewyde span personeel by Graan SA verdien ook spesiale vermelding vir hulle inisiatiewe om volhoubare oplossings vir die graanprodusente te verseker.

In retrospek oor die afgelope jaar, besef 'n mens opnuut dat Graan SA uitsluitlik deur die krag van die Groot Planter stabiliteit kon help bring in 'n uitdagende klimaat en landboujaar. En daarvoor is ons baie dankbaar.



Members and image of Grain SA supported effectively

GRAIN ECONOMY AND MEMBER MARKETING

Production conditions

The 2018/2019 season was once again challenging for the summer and winter grain regions. In the summer rainfall region the rain occurred late. Everyone held their breath to see whether the frost would stay away and what the yields would be. According to the ninth estimate of the National Crop Estimates Committee (CEC), South Africa produced the following crops in the summer grain region (Table 1):

Lede en Graan SA se beeld effektief ondersteun

GRAANEKONOMIE EN LEDEBEMARKING

Produksietoestande

Die 2018/2019-seisoen was weer eens uitdagend vir beide die somer- en wintergraangebiede. In die somerreënvalstreek was dit 'n jaar waarin reën laat ontvang is. Almal het asem opgehou om te sien of die ryp gaan wegbly en wat die opbrengste gaan wees. Volgens die Nasionale Oesskatting Komitee (NOK) se negende skatting het Suid-Afrika die volgende gewasse in die somergraangebied geproduseer (Tabel 1):

TABLE 1 – Crops produced in the summer grain region in 2018/2019.
TABEL 1 – Gewasse geproduseer in die somergraangebied in 2018/2019.

CROP	Ton
White maize	5 538 240
Yellow maize	5 647 810
Sunflower seed	680 940
Soybeans	1 170 345
Groundnuts	19 455
Sorghum	134 525
Total	13 257 670

Source: CEC

GEWAS	Ton
Witmielies	5 538 240
Geelmielies	5 647 810
Sonneblomsaad	680 940
Sojabone	1 170 345
Grondbone	19 455
Sorghum	134 525
Totaal	13 257 670

Bron: NOK

Groundnut production was particularly challenging, with rain not occurring in time and only 19 455 tons of groundnuts therefore being produced. Soybean production experienced a taxing year with below-average yields. This, together with good consumption figures, brought the supply of and demand for soybeans into balance again, given a high carry-over stock from the previous year. It remains a miracle and a great blessing to have been able to produce these tonnages in such a challenging year.

The grading of maize was a problem in certain regions, and producers lost income as a result. A positive trend was the new record consumption figures achieved for maize (10,7 million tons processed in 2018/2019) and soybeans (1,3 million tons processed in 2018/2019). Grain SA is confident that this trend will continue in the medium term.

Information

Grain SA has invested considerable time in promoting the industry by:

- ▶ Monitoring input costs, given international movements and trends.
- ▶ Removing import tariffs on inputs.
- ▶ Co-ordinating international and local research to promote production.
- ▶ Gathering and disseminating market information, including ad hoc reports, daily market reports, videos in collaboration with the Bureau for Food and Agricultural Policy (BFAP), and presentations at farmer days, consultations with the government regarding the regulatory environment, in order to allow better marketing

Grondboonproduksie was veral uitdagend met reën wat nie betyds geval het nie en gevolglik is slegs 19 455 ton grondbone geproduseer. Sojaboonproduksie het 'n stram jaar beleef met ondergemiddelde opbrengste. Dit, tesame met goeie verbruiksyfers, het weer die vraag en aanbod van sojabone in balans gebring gegewe 'n hoë oordragvoorraad vanaf die vorige seisoen. Dit bly 'n wonderwerk en 'n groot seën om in so 'n uitdagende jaar steeds dié tonne te kon produseer.

Die gradering van mielies was wel in sekere streke problematies en produsente het as gevolg daarvan inkomste verloor. 'n Positiewe beweging was die nuwe rekordverbruiksyfers wat behaal is vir mielies (10,7 miljoen ton in 2018/2019 verwerk) en sojabone (1,3 miljoen ton in 2018/2019 verwerk). Graan SA is vol vertroue dat dié tendens in die medium termyn sal voortduur.

Inligting

Graan SA het ruim tyd belê in die bevordering van die bedryf deur:

- ▶ Insetkoste te monitor gegewe internasionale bewegings en neigings.
- ▶ Invoertariewe op insette te verwyder.
- ▶ Internasionale en plaaslike navorsingkoördinerings vir die bevordering van produksie.
- ▶ Versameling en verspreiding van markinligting om beter bemarkingsbesluite te neem wat insluit ad hoc-verslae, daaglikse markverslae, video's in samewerking met die Buro vir Voedsel- en Landboubeleid (BFAP), asook aanbiedings by boeredae, konsultasie met



Alzena Gomes
PUBLIC RELATIONS OFFICER
SKAKELBEAMPT



Annemarie de Beer
EVENTS MANAGER
FUNKSIEBESTUURDER



Toit Wessels
ASSISTANT MANAGER: NAMPO
AND MARKETING
ASSISTENT-BESTUURDER: NAMPO
EN BEMARKING



Elray de Klerk
SUPPORT OFFICER
ONDERSTEUNINGSBEAMPT



Rialeen Lombard
SUPPORT OFFICER: HARVEST DAY
ONDERSTEUNINGSBEAMPT: OESDAG



Ikageng Maluleke
AGRICULTURAL ECONOMIST
LANDBOU-EKONOM



Hailey Ehrenreich
COMMITTEE OFFICER: WESTERN CAPE
KOMITEEBEAMPT: WES-KAAP



Dr Dirk Strydom
MANAGER: GRAIN ECONOMY
AND MARKETING
BESTUURDER: GRAANEKONOMIE
EN BEMARKING



Corné Louw
SENIOR ECONOMIST: INPUTS
SENIOR EKONOM: INSETTE



Dirk Kotzé
MEMBER MARKETING AND
COMMUNICATIONS OFFICER
LEDEBEMARKING- EN
KOMMUNIKASIEBEAMPT



Luzelle Botha
COMMITTEE OFFICER
KOMITEEBEAMPT



Marina Kleynhans
ADMINISTRATIVE CLERK
ADMINISTRATIEWE KLERK



Luan van der Walt
AGRICULTURAL ECONOMIST
LANDBOU-EKONOM



Patricia Zimu
ADMIN OFFICER: LEVIES
ADMINBEAMPT: HEFFINGS



Bennie Zaayman
GROUNDS MANAGER
TERREINBESTUURDER



Carmen Visser
SECRETARY
SEKRETARESSE



Ruan Schutte
JUNIOR AGRICULTURAL ECONOMIST
AND MARKETER (PAARL)
JUNIOR LANDBOU-EKONOM
EN BEMARKER (PAARL)



Wim Venter
ADMINISTRATIVE OFFICER: HARVEST DAY
ADMINISTRATIEWE BEAMPT: OESDAG

decisions to be made, and ensuring that the local market has export markets and that new export markets are developed.

Grain SA, in collaboration with BFAP, is also establishing a benchmark system to improve efficiency, but also to be able to measure more accurately per region against international standards.

Markets

The organisation has also spent considerable time on gaining access to the Chinese market to export maize. Although this market is already open, the protocol must be followed and inspections must be done to approve infrastructure and facilities. This was done and certain companies and infrastructure were approved.

With respect to soybeans, research and analyses were carried out to provide China with information to draw up protocols. Grain SA also received a delegation from the Chinese government to South Africa in order to get the necessary regulations in place. In collaboration with the South African Cereals and Oilseeds Trade Association (SACOTA), Grain SA also arranged a study on the use of registered chemicals and the impact of these in South Africa so that the Korean export market can remain accessible to maize exports.

The import and trading of wheat remain a focus point and several discussions were held with the relevant government departments on the fair operation of the quota and tariff systems. Although the tariff announcement dates have already been moved forward, there is still considerable uncertainty in the market due to the unequal announcement period. The goals for importing and exporting wheat continue to be a priority and Grain SA remains involved in the Wheat Forum in order to allow these goals to be achieved within the current legal system.

Grain SA was freely involved in discussions on free-trade agreements in order to ensure that local production was protected and that the tariff lines on exports of other industries were not promoted at the expense of grains and oilseeds. Local production and the protection of this remains an important focus area in an economically sustainable system. This year also saw hard work being done to expand local production in order to reduce South Africa's dependence on imports.

Inputs

The first soybean breeding and technology levy was collected by the South African Cultivar and Technology Agency (SACTA). However, to producers the effect of this is the most important element. Most of the soybean seed companies left their prices unchanged this year and some even reduced their prices – which is naturally one of the objectives of the programme. New seed technology is already being tested in the country, with undertakings by new entrants to the local market. Several new companies have already started investing in South Africa, which means that new germ plasm is available locally for the development of new cultivars. Grain SA monitors the progress carefully to make sure that producers will receive the benefit of this.

A part of sustainability is the affordability of inputs. The National Agricultural Marketing Council (NAMC) was requested to investigate the chemistry value chain in terms of effectiveness. The fertiliser quality monitoring process is still in place and serves as method of ensuring that producers get what they pay for. Every producer who participates also receives a personal report on their specific results. Meetings were held with all the umbrella organisations, including the South African National Seed Organisation (SANSOR), the Fertiliser Association of South Africa (FERTASA), CropLife SA and the South African Agricultural Machinery Association (SAAMA), on talks regarding the inputs, but also to explain the financial position of producers. Seed companies were also approached individually. Grain SA supported several producers who experienced problems with inputs.

Producers are under financial pressure because of the ongoing droughts. In addition to discussions with input providers and financiers, Grain SA took steps to put the recommendations in the Section 7

die regering rakende die regulatoriese omgewing en om te verseker dat die plaaslike mark uitvoermarkte het en nuwe uitvoermarkte ontwikkel word.

Graan SA is in samewerking met BFAP ook besig om 'n plaaslike "benchmark"-stelsel te vestig om sodoende doeltreffendheid te verbeter maar ook om per gebied meer akkuraat teen internasionale standaarde te kan meet.

Markte

Die organisasie het ook heelwat tyd spandeer om toegang tot die Chinese mark te bewerkstellig vir die uitvoer van mielies. Hoewel dié mark reeds oop is, moet die protokol nagekom word en inspeksies gedoen word vir goedkeuring van infrastruktuur en fasiliteite. Dit is gedoen en sekere maatskappye en infrastruktuur is goedgekeur.

In terme van sojabone is navorsing en analyses gedoen om inligting aan China te verskaf vir die opstel van protokolle. Graan SA het ook 'n delegasie van die Chinese regering na Suid-Afrika ontvang om sodoende die nodige regulasies in plek te kry. Tesame met die Suid-Afrikaanse Graan en Oliesaadverhandelingsvereniging (SACOTA) het Graan SA ook 'n studie laat doen oor die gebruik van geregistreerde chemikalieë en die impak hiervan in Suid-Afrika sodat die Koreaanse uitvoermark vir mielie-uitvoere toeganklik kan bly.

Die invoer en verhandeling van koring bly 'n fokuspunt en verskeie gesprekke is met die relevante regeringsdepartemente gevoer rakende die regverdige werking van die kwota- en tariefstelsels. Hoewel die tarief-afkondigingsdatums reeds vervroeg is, is daar steeds baie onsekerheid in die mark weens die onwederige afkondigingstydperk. Die voornemens vir in- en uitvoere van koring is steeds 'n prioriteit en Graan SA bly betrokke in die Koringforum om dit binne die huidige regstelsel te laat realiseer.

Graan SA was op 'n geredelike basis betrokke by gesprekke oor vryhandel-ooreenkomste ten einde te verseker dat plaaslike produksie beskerm word en ander bedrywe se tarieflyne op uitvoere nie ten koste van grane en oliesade bevorder word nie. Plaaslike produksie en die beskerming hiervan bly 'n vername fokusarea in 'n ekonomies volhoubare sisteem. Daar is vanjaar ook hard gewerk om plaaslike produksie uit te brei om Suid-Afrika se afhanklikheid van invoere te verminder.

Insette

Die eerste sojaboon teling-en-tegnologieheffing is deur die SA Kultivar-en Tegnologie-agentskap (SACTA) ingesamel. Vir produsente is die effek hiervan egter die belangrikste. Die meeste van die sojaboon saadmaatskappye het vanjaar hul pryse onveranderd gelaat en sommige het selfs 'n verlaging in pryse ingestel – wat uiteraard een van die doelwitte van die program is. Nuwe saadtegnologie word reeds in die land getoets, met ondernemings deur nuwe toetreders tot die plaaslike mark. Verskeie nuwe maatskappye het reeds in Suid-Afrika begin investeer wat beteken dat nuwe kiemplasma plaaslik beskikbaar is vir die ontwikkeling van nuwe kultivars. Graan SA monitor die vordering noukeurig om seker te maak dat produsente die voordeel hiervan sal ontvang.

'n Deel van volhoubaarheid is die bekostigbaarheid van insette. Die Nasionale Landbouemarkingsraad (NLBR) is versoek om die chemie-waardeketting in terme van doeltreffendheid te ondersoek. Die kunsmis-kwaliteit moniteringsproses is steeds in plek en dien as 'n metode om te verseker dat produsente kry waarvoor hul betaal. Elke produsent wat deelneem, kry ook 'n persoonlike verslag oor sy/haar spesifieke uitslae. Vergaderings is gehou met al die sambreelorganisasies, waaronder die Suid-Afrikaanse Nasionale Saadorganisasie (SANSOR), die Kunsmisvereniging van Suid-Afrika (FERTASA), CropLife SA en die SA Landboumasjinerieassosiasie (SALMA), oor besprekings rakende die insette maar ook om die finansiële posisie van produsente te verduidelik. Saadmaatskappye is ook individueel genader. Graan SA het verskeie produsente ondersteun wat probleme met insette ervaar het.

Produsente verkeer onder finansiële druk weens die voortslepende droogtes. Benewens gesprekvoering met insetverskaffers en finansiers het Graan SA skouer aan die wiel gesit om die aanbevelings van



Drought Relief Report by NAMC, as approved by the previous Minister of Agriculture, Forestry and Fisheries, into place. Among other things this involved the development of support with respect to crop insurance. In collaboration with the South African Insurance Association (SAIA), Grain SA submitted several applications, presented workshops and made submissions to the Department of Agriculture, Land Reform and Rural Development (DALRRD), as well as to the Treasury. The organisation sincerely hopes that such a system can be introduced to support emerging producers during cycles of drought.

A programme in terms of which producers can place their profits in a savings plan and thus also apply tax management was developed in collaboration with Corporate Guarantee. The plan supports producers in utilising funds in cycles when they experience financial pressure, without limiting growth and cash flow.

Diesel rebate

The diesel rebate system remains a challenge and Grain SA is working aggressively on negotiating the best possible system and compensation for producers. Grain SA was involved in various discussions with the South African Revenue Service (SARS) to resolve problems, but also to propose a new system. We are insisting that the system be simple and that producers' primary production activities must qualify 100% for the rebate. Although we succeeded in assisting producers, many of them still experience problems with the system every month.

Value chain

The wheat turnaround strategy has been in progress for quite some time. Major success was achieved in 2019 with the change in the grading regulations – which now offer producers more value for the quality of their product. According to a study by BFAP, the benefit factor is, on average, R235/ha on dryland. Grain SA also held talks with the purchasers of barley to develop a more transparent purchase system.

Processors were visited to determine how to increase the local demand for groundnuts. In collaboration with the Groundnut Forum, an application was submitted to introduce an import tariff on peanut butter. The Soybean Forum has taken a fresh look at the future of the soybean industry in order to limit the import of oilcake and to establish a constant supply chain. It has already produced good results in the first year, with a record consumption figure. Grain SA remains involved in the discussions in order to ensure that the local market is sound and sustainable. The sorghum industry is also collaborating with the Department of Science and Innovation on a value-chain study to make recommendations on sustainability.

The poultry industry is one of the biggest off-takers of grains and oilseeds. It is therefore important to ensure that local production is promoted to create a sustainable market for grains and oilseeds. The promotion of export possibilities is creating additional markets and neutralising the effect of imports. Grain SA is involved in talks with various role-players to support the local poultry market, but also to create new markets.

Location differential

At the request of Grain SA that an independent person investigate the system, the JSE appointed Prof Matt Roberts to assess the system and make recommendations. Roberts indicated that, due to the concentration of market forces, the system was not the perfect one, but that it was the most suitable. He made a few recommendations inside and outside the system to improve it. In the light of the recommendations, Grain SA also made a few suggestions to the JSE to improve the system. If the system is not to be abolished, it is important that it does function as accurately as possible.

A large number of the above variables remain of concern to the industry and will receive continued attention – despite positive developments and solutions. It remains important to ensure that our producers

NLBR se Afdeling 7 Droogtehelpkomitee-verslag, soos goedgekeur deur die vorige Minister van Landbou, Bosbou en Visserie, in plek te kry. Dit behels onder andere die ontwikkeling van ondersteuning rakende oesversekering. Graan SA het in samewerking met die Suid-Afrikaanse Versekeringsvereniging (SAIA) verskeie aansoeke, werksinkels en voorleggings gedoen by die Departement van Landbou, Grondhervorming en Landelike Ontwikkeling (DALRRD) asook by die Tesourie. Die organisasie hoop van harte dat so 'n stelsel ingestel kan word om kommersiële en opkomende produsente tydens droogtesiklusse te ondersteun.

'n Program waarvolgens produsente hul winste in 'n spaarplan kan plaas en sodoende belastingbestuur toepas, is in vennootskap met Corporate Guarantee ontwikkel. Die plan ondersteun produsente om fondse te benut in siklusse wanneer daar finansiële druk ervaar word sonder om groei en kontantvloei in te perk.

Dieselrabat

Die dieselrabatstelsel bly 'n uitdaging en Graan SA werk aggressief daaraan om vir produsente die beste moontlike stelsel te beding asook vergoeding. Graan SA was in verskeie gesprekke met die SA Inkomstediens (SAID) om probleme op te los, maar ook om 'n nuwe stelsel voor te stel. Daar word voet by stuk gehou dat die stelsel eenvoudig moet wees en dat produsente se primêre produksie-aktiwiteite 100% vir die rabat moet kwalifiseer. Alhoewel daarin geslaag is om produsente by te staan, ervaar menige produsente steeds maandeliks probleme hiermee.

Waardeketting

Die koring-omdraaistrategie is al 'n geruime tyd aan die gang. In 2019 is groot welslae bereik met die verandering in die graderingsregulasies – wat nou vir produsente meer waarde vir die kwaliteit van hul produk bied. Volgens 'n studie deur BFAP beloop die voordeelfaktor gemiddeld R235/ha op droëland. Graan SA was ook in gesprek met die aankopers van gars om 'n meer deursigtige aankoopstelsel te ontwikkel.

Verwerkers is besoek ten einde te bepaal hoe om die plaaslike vraag na grondbone te verhoog. Voorts is daar saam met die Grondboonforum aansoek gedoen vir die instel van 'n invoertarief op grondboonbotter. Die Sojaboonforum het opnuut besin oor die toekoms van die sojaboonbedryf ten einde die invoere van oliekoek te beperk en daardeur 'n konstante aanbodketting te vestig. In die eerste jaar het dit reeds goeie resultate getoon met 'n rekord verbruiksyfer. Graan SA bly betrokke in die gesprekke om sodoende toe te sien dat die plaaslike mark gesond en volhoubaar is. Binne die sorghumbedryf word daar ook tans in vennootskap met die Departement van Wetenskap en Innovasie gewerk aan 'n waardekettingstudie om aanbevelings rakende volhoubaarheid te doen.

Die hoenderbedryf is een van die grootste afnemers van grane en oliesade. Dit is dus belangrik om te verseker dat plaaslike produksie bevorder word om sodoende 'n volhoubare mark vir grane en oliesade te skep. Deur uitvoermoontlikhede te bevorder, word addisionele markte geskep en word die effek van invoere teengewerk. Graan SA is in gesprek met verskeie rolspelers om die plaaslike hoendermark te ondersteun, maar ook om nuwe markte te skep.

Liggingsdifferensiaal

Op versoek van Graan SA dat 'n onafhanklike persoon die stelsel ondersoek, het die JSE vir prof Matt Roberts aangestel om die stelsel te evalueer en om aanbevelings te maak. Prof Roberts het aangedui dat die stelsel weens die konsentrasie van markkragte wel nie die volmaakte stelsel is nie, maar dat dit tog die mees geskikte een is. Hy het 'n paar aanbevelings binne en buite die stelsel gemaak om dit te verbeter. Graan SA het ook gegewe die aanbevelings voorstelle gemaak aan die JSE in terme van verbetering. Dit is belangrik as die stelsel nie verwyder word nie dat dit wel so akkuraat as moontlik moet funksioneer.

Heelwat van die bogenoemde veranderlikes bly bekommernisse vir die bedryf en dit geniet deurentyd aandag te midde van positiewe

have effective and reliable information to support them in their purchasing and marketing decisions and to ensure sustainable production. The division has a team of experts who pursue this vision.

NAMPO

NAMPO HARVEST DAY

NAMPO 2019 was characterised by good weather, and 81 345 visitors attended this trade show and popular meeting place for people involved in agriculture. As quite a number of grain producers in the interior were holding their breath about early frost that could affect their crop yield, the relatively warm weather up to the NAMPO week was very welcome.

After the land reform debate, drought and low grain prices of the past year, the joviality and positive attitude of producers were marked. According to the Grain SA chairperson, it was notable that the uncertainty was less than last year. Producers also displayed a solution- and growth-driven attitude at NAMPO.

The Nation in Conversation forum's discussion points this year shifted from land reform to what is required to allow the agricultural sector and the country's economy to grow. What came up was that the agricultural sector is positive about allowing the plan for economic growth to succeed. Matters to which the government should attend urgently involve financing for black farmers, expanding markets, the profitability of the sector, a national crop insurance subsidy, skills development, improvement of infrastructure, as well as research on climate in particular.

On his first visit to the NAMPO Harvest Day, the Deputy Minister of Agriculture, Forestry and Fisheries, Sifiso Buthelezi, described it as the best-kept secret of the agricultural sector that should be experienced by everybody in South Africa who consumes food. He says that in Chile and Argentina – where he had attended similar shows – the country comes to a standstill to support producers.

The focus of NAMPO as trade show is retained throughout, but the human side of NAMPO is an undeniable feature, and the strengthening of relationships, partnerships and friendships remains a drawcard. NAMPO offers the agricultural sector a platform for one large strategic planning session every year. Individual and collective plans for the next year are made here to take back to the farm. With the greater supply of technology and opportunities arising here, NAMPO increasingly demands more than a one-day visit. It is noteworthy that – like the drivers and directors of agriculture – the executive heads of input providers and agribusinesses and other decision-makers are present on the grounds throughout NAMPO week.

This year the 775 exhibitors were still popular, despite the prevailing economic pressure on consumers. Some of the exhibitors had record sales. According to exhibitors, the visitors to their exhibiting space ensured quality enquiries and promising leads – which are worth much more than just a volume of people.

NAMPO's aim is not to become bigger, but to continuously offer the experience to visitors at such a standard that they want to come again next year. The size of the grounds and the infrastructure that is so well distributed already provide a more restful experience that is family friendly and has something for everyone. Even the landing strip handled a record of 376 light aeroplanes and 63 helicopters with ease.

NAMPO CAPE

We look back gratefully on a very successful NAMPO Cape 2019. These three days were a highlight on the Cape agricultural calendar to the 435 exhibitors, spread over the 480 available exhibiting spaces, and the upgraded parking areas and the larger number of kiosks made the event worthwhile.

Over the three days of the show, 20 250 visitors attended NAMPO Cape. This figure exceeded the expectations of the organisers. Thursday, 5 September was the most popular day, with approximately 9 000 visitors passing through the gates.

verwikkeling en oplossings. Dit bly belangrik om te verseker dat ons produsente effektiewe, betroubare inligting tot hulle beskikking het om aankoop- en bemarkingsbesluite te ondersteun en volhoubare produksie te verseker. Die afdeling het 'n span kundiges wat die visie nastreef.

NAMPO

NAMPO OESDAG

NAMPO 2019 is gekenmerk deur goeie weer en 81 345 besoekers wat dié handelskou en gewilde ontmoetingsplek van mense in landbou bygewoon het. Aangesien heelwat binnelandse graanprodusente asem opgehou het vir vroeë ryp wat oesopbrengste kon beïnvloed, was die betreklike warm weer wat tot die NAMPO-week geheers het, 'n welkome mylpaal.

Ná die grondhervormingsdebat, droogte en lae graanpryse van die afgelope jaar, was die gemoedelikheid en positiwiteit van produsente merkbaar. Volgens die Graan SA voorsitter was dit opmerklik dat die onsekerheid minder was as verlede jaar. Verder het produsente 'n oplossing- en 'n groeigedrewe ingesteldheid by NAMPO getoon.

Die Nasie in Gesprek-forum se gesprekspunte het vanjaar verskuif van grondhervorming na dit wat nodig is om die landbousektor en die land se ekonomie te laat groei. Wat na vore gekom het, is dat die landbousektor positief is om die plan vir ekonomiese groei te laat slaag. Sake waaraan die regering dringende aandag behoort te skenk, behels finansiering vir swart boere, die uitbreiding van markte, winsgewendheid van die sektor, 'n nasionale oesversekeringssubsidie, vaardigheidsontwikkeling, verbetering van infrastruktuur asook navorsing oor veral klimaat.

Op sy eerste besoek aan die NAMPO Oesdag het die Adjunkminister van Landbou, Bosbou en Visserie, Sifiso Buthelezi, dit beskryf as die landbousektor se bes bewaarde geheim wat deur almal in Suid-Afrika wat voedsel verbruik, ervaar moet word. Hy sê in Chili en Argentinië – waar hy soortgelyke skoue bygewoon het – kom dié lande tot stilstand om produsente te ondersteun.

NAMPO se fokus as handelskou word deurlopend behou, maar die menskant van NAMPO is 'n onmiskenbare kenmerk en die vestiging van verhoudinge, vennootskappe en vriendskappe bly 'n trekpleister. NAMPO bied jaarliks aan die landbousektor 'n platform om een groot strategiese beplanningssessie te hou. Individuele en kollektiewe planne vir die volgende jaar word hier gemaak om terug te neem na plaasvlak. Met die groter aanbod van tegnologie en geleenthede wat hier ontstaan, verg NAMPO toenemend meer as 'n een dag-besoek. Dit is opmerklik dat – net soos die drywers en rigtinggewers van landbou – daar regdeur die NAMPO-week 'n teenwoordigheid van insetverskaffers en landboubesighede se uitvoerende hoofde en ander besluitnemers op die terrein te sien is.

Vanjaar se 775 uitstallers het steeds aftrek gekry ten spyte van die heersende ekonomiese druk op verbruikers. Sommige uitstallers het rekordverkope bereik. Volgens uitstallers het die besoekers aan hul uitstalruimte gesorg vir kwaliteit navrae en belowende leidrade – wat baie meer werd is as net 'n volume mense.

NAMPO se mikpunt is nie om groter te gaan nie, maar om die ervaring vir besoekers deurlopend op so 'n standaard aan te bied, dat hulle dit die volgende jaar weer wil bywoon. Die grootte van die terrein en die infrastruktuur wat goed versprei is, sorg reeds vir 'n rustiger ervaring wat gesinsvriendelik is en iets vir elkeen bied. Selfs die vliegveld het 'n rekord van 376 vliegtuie en 63 helikopters met gemak hanteer.

NAMPO KAAP

Dit is met dankbaarheid dat ons terugkyk na 'n baie geslaagde NAMPO Kaap 2019. Vir die 435 uitstallers versprei oor die 480 beskikbare uitstalruimtes, die opgegradeerde parkeerareas sowel as die groter getal kiosks was dié drie dae 'n hoogtepunt op die Kaapse landboukalender en beslis die moeite werd.

Oor die drie skou-dae het 20 250 besoekers NAMPO Kaap bygewoon. Dié syfer het die organiseerders se verwagtinge oortref. Donderdag, 5 September was die gewildste dag met nagenoeg 9 000 besoekers wat deur die hekke gestroom het.

New additions to the show, including large television screens on which visitors could follow the popular Nation in Conversation programme live on the grounds, were definitely a hit. Equally popular were the tractors with trailers transporting visitors and offering tired feet a well-earned rest. The beautiful flower exhibit was a wonderful experience and captivated young and old, while the daily programme for ladies entertained the fair sex.

NAMPO Cape also offered producers in the Western Cape the opportunity to examine new technology and make new plans for the production season.

NAMPO/ALFA – LIVESTOCK, HUNTING AND OUTDOORS

Grain SA and ALFA have decided to join forces and add a new expo to the agricultural calendar. This announcement is the result of numerous talks, with these two major names in the industry offering the first NAMPO/ALFA Livestock, Hunting and Outdoors Expo at NAMPO Park just outside Bothaville in 2020.

The South African livestock industry is growing all the time and is an important component of the local economy. This growth is reflected in the fact that ALFA has grown to be the biggest livestock expo in the country over the past four years. The logical next step is to expand it, and with years of successful shows behind it, NAMPO Park offers ALFA a logical space to spread its wings.

ALFA is not your ordinary expo, and since it was established it has offered role-players in the livestock industry different unique platforms that present opportunities for networking. It involves local role-players and stakeholders from across the African continent.

Quite a number of producers expressed the need for a centrally located hunting and outdoors expo. To the South African producer, livestock, outdoors activities and hunting are complementary aspects, and the combination is a winning recipe. NAMPO Park already has excellent infrastructure and systems like sufficient parking, kiosks, ablution facilities, stock facilities and other venues – all offering the opportunity to not only house such an event, but to expand it to excellence. In addition, South African producers already feel at home at NAMPO Park. Numerous opportunities and plans are envisaged for the expo, which will be presented at NAMPO Park from 24 to 26 September 2020.

SA Graan/Grain magazine

Grain SA distributes the *SA Graan/Grain* magazine to roughly 18 000 readers every month. This full-colour publication is used to empower South Africa's producers of grains and oilseeds with knowledge. Suppliers of input resources and services in the agricultural industry also continuously utilise the magazine as an effective advertising medium to their client base.

As a specialist publication and official mouthpiece, *SA Graan/Grain* carries the image of Grain SA out to its members, the public and opinion makers in the industry and in the government. The editorial content reflects a balance of appropriate industry information as well as technical and research-based articles. Topics like grain market trends, an input overview, tips on sound labour practices, the climate and even political and economic comments are included throughout. The serious side of farming alternates with popular articles (and even humour) on people and events in the grain industry.

In the year under review matters like positioning and market share in the semi-commercial magazine industry, balance of technical and current content, expansion of the digital footprint and the wider utilisation of the *SA Graan/Grain* brand were assessed afresh by the magazine's Editorial Committee. Strategic focus areas were subsequently accepted and are currently being implemented.

SA Graan/Grain focuses on being a leading news and information platform for the grain and oilseeds industry. Through the magazine readers can also get to know Grain SA as a trendsetting organisation better.

The magazine is supported by the contributions of all the advertisers, and Grain SA wants to thank every advertiser for their continued support.

Nuwe toevoegings tot die skou, insluitend die groot televisieskerm waarop besoekers die gewilde Nasie in Gesprek-program regstreeks op die terrein kon volg, was voorwaar 'n treffer. Ewe gewild was die trekkers met waentjies wat besoekers vervoer het en moeë voete 'n welverdiende ruskans gebied het. Die pragtige blomme-uitstalling was 'n belewenis en het oud en jonk bekoor, terwyl die daaglikse damesprogram die skoner geslag vermaak het.

NAMPO Kaap het produsente in die Wes-Kaap ook die geleentheid gebied om nuwe tegnologie te besigtig en nuwe planne vir die produksieseisoen te beraam.

NAMPO ALFA – LEWENDEHAWE, JAG EN BUITELEWE

Graan SA en ALFA het besluit om hande te vat en 'n nuwe ekspo by die landboukalender te voeg. Die aankondiging kom ná talle samesprekings, met die resultaat dat die twee groot name in die bedryf die eerste NAMPO/ALFA Lewendehawe, Jag en Buitelewe-ekspo in 2020 op NAMPO Park net buite Bothaville gaan aanbied.

Die Suid-Afrikaanse lewendehawe-bedryf groei toenemend en is 'n belangrike komponent van die plaaslike ekonomie. Hierdie groei word weerspieël in die feit dat ALFA die afgelope vier jaar gegroei het tot die grootste lewendehawe-ekspo in die land. Die logiese volgende stap is om dit te laat uitbrei en met jare se suksesse op die kersstok bied NAMPO Park aan ALFA 'n logiese ruimte om sy vlerke te spreid.

ALFA is nie u gewone ekspo nie en het sedert die ontstaan van die land rolspeleers in die lewendehawe-bedryf verskillende unieke platforms aangebied wat geleenthede bied vir netwerkvorming. Dit geld vir plaaslike rolspeleers en belanghebbendes regoor die Afrika-kontinent.

Heelwat produsente het die behoefte uitgespreek vir 'n sentraal geleë jag- en buitelewe-ekspo. Lewendehawe, buiteligaktiwiteite en jag is komplementêre aspekte van die Suid-Afrikaanse produsent en die kombinasie bied 'n wenresep. NAMPO Park beskik reeds oor 'n uitstekende infrastruktuur en stelsels – soos voldoende parkeerplek, kiosks, ablusiegeriewe, vee-fasiliteite en ander lokale – wat alles die geleentheid bied om nie net so 'n geleentheid te huisves nie, maar om dit uit te brei tot uitnemendheid. Suid-Afrikaanse produsente voel boonop reeds tuis op NAMPO Park. 'n See van geleenthede en planne word in die vooruitsig gestel vir die ekspo wat 24 tot 26 September 2020 op NAMPO Park aangebied word.

SA Graan/Grain-tydskrif

Graan SA gee die *SA Graan/Grain*-tydskrif maandeliks uit aan nagenoeg 18 000 lesers. Dié volkleurpublikasie word aangewend om Suid-Afrika se produsente van grane en oliesade met kennis te bemagtig. Verskaffers van insetmiddele en dienste in die landboubedryf benut ook deurlopend die tydskrif as doeltreffende advertensiemedium na hulle klantebasis.

As spesialispublikasie en amptelike mondstuk, dra *SA Graan/Grain* die beeld van Graan SA uit aan sy lede, die publiek sowel as meningvormers in die bedryf en in regeringskringe. Die redaksionele inhoud weerspieël 'n balans van toepaslike bedryfsinligting sowel as tegniese en navorsingsgebaseerde artikels. Onderwerpe soos graanmarkttendense, 'n insetoorsig, wenke oor goeie arbeidspraktyke, die klimaat en selfs politieke en ekonomiese kommentaar word deurlopend aangebied. Dié ernstige sy van boerdery word afgewissel met lekkerlees-artikels (en selfs humor) oor mense en gebeurtenisse in die graanbedryf.

In die jaar onder oorsig is sake soos posisionering en marktaandeel in die semikommersiële tydskrifmark, balans van tegniese en aktuele inhoud, verbreding van digitale voetspoor en die breër benutting van die *SA Graan/Grain*-handelsmerk opnuut deur die tydskrif se Redaksionele Komitee geëvalueer. Strategiese fokusareas is vervolgens aanvaar en word tans geïmplementeer.

SA Graan/Grain fokus daarop om 'n leidende nuus- en inligtingsplatform vir die graan- en oliesadebedryf te wees. Deur middel van die tydskrif kan lesers ook vir Graan SA – as toonaangewende organisasie – beter leer ken.

Die tydskrif word moontlik gemaak deur die bydrae van al die adverteerders en Graan SA bedank graag elke adverteerder vir die volgehoue ondersteuning.

LEVY DIVISION

Commodity levy

We would like to thank members of Grain SA who regularly paid their levies over the past year. The levy income remains the most important source of income to Grain SA. The 2017/2018 marketing year felt the first pressures of the low commodity prices in the interior, as well as of the drought in the Cape. Nevertheless, producers continued to pay their levies faithfully. Grain SA would like to thank all members who loyally make their contributions on all their tons. However, members can be assured that expenses were actively reduced in order to compensate for the smaller income from the commodity levies.

Membership of Grain SA

The constitution of Grain SA makes provision for commercial as well as study group members. In terms of the constitution, membership for commercial members is subject to the payment of a commodity levy per ton on all grain produced, with a minimum amount of R1 000 plus VAT payable for full membership. Study group members currently pay R50 per year.

HEFFINGSAFDELING

Bedryfsheffing

Groot dank word uitgespreek aan lede van Graan SA wat die afgelope jaar hul heffings getrou betaal het. Die heffinginkomste bly steeds die belangrikste bron van inkomste vir Graan SA. Die 2017/2018-bemarkingsjaar het die eerste druk gevoel van die lae kommoditeitspryse in die binneland sowel as die droogte in die Kaap. Nietemin het produsente steeds getrou hul heffings betaal. Graan SA bedank alle lede wat lojaal hul bydraes op al hul tonne maak. Lede kan egter verseker wees dat uitgawes daadwerklik besnoei is, om sodoende te kompenseer vir die kleiner inkomste van die bedryfsheffings.

Lidmaatskap van Graan SA

Graan SA se grondwet maak voorsiening vir kommersiële lede sowel as studiegroeplede. In terme van die grondwet is lidmaatskap vir kommersiële lede onderhewig aan die betaling van 'n bedryfsheffing per ton op alle graan geproduseer, met 'n minimum bedrag van R1 000 plus BTW betaalbaar vir volwaardige lidmaatskap. Studiegroeplede betaal tans R50 per jaar.

TABLE 2 – Grain SA levy per ton per type of crop for 2019/2020.

TABEL 2 – Graan SA-heffing per ton per gewas vir 2019/2020.

CROP	LEVY PER TON*
Summer grains	
Maize	R3,00
Sorghum	R3,00
Soybeans	R6,00
Sunflower	R6,00
Groundnuts	R11,50
Winter grains	
Wheat	R3,50
Canola	R4,70
Barley	R3,50
Other cereals	R3,50

* The above amounts exclude VAT

GEWAS	HEFFING PER TON*
Somergrane	
Mielies	R3,00
Sorghum	R3,00
Sojabone	R6,00
Sonneblom	R6,00
Grondbone	R11,50
Wintergrane	
Koring	R3,50
Kanola	R4,70
Gars	R3,50
Ander grane	R3,50

* Bogenoemde bedrae sluit BTW uit

New Era farmers who produce grain can also become members of Grain SA by paying the same set levies as commercial members.

Exclusive benefits were also created for members:

- ▶ The Momentum policy package was revised and adjusted to members' needs.
- ▶ Ford offers Grain SA members special prices on any vehicle.
- ▶ Tax-free savings plan with Corporate Guarantee.
- ▶ NAMPO tickets.

Collection of levy

Levies are collected in the following ways:

BY COLLECTION AGENTS

Collection agents are companies to whom grain is delivered. Grain SA concludes contracts with the organisations in which they undertake to collect levies at the first point of delivery with the agreement of the producers and to pay over these levies to Grain SA within a stipulated period. The logos of the Grain SA partners appear in **Figure 1**.

DIRECT TRANSFERS

Members can also pay their levies directly to Grain SA by way of a cheque, a bank deposit or an electronic transfer. This payment method is particularly suitable where producers market their grain to parties who do not form part of the Grain SA levy structures.

Nuwe era-boere wat graan produseer, kan 'n lid van Graan SA word deur die neergelegde heffing te betaal – soos wat vir kommersiële produsente geld.

Eksklusiewe voordele vir lede is ook geskep:

- ▶ Momentum polispakket is hersien en aangepas volgens lede se behoeftes.
- ▶ Ford bied spesiale pryse op enige voertuig aan vir Graan SA-lede.
- ▶ Belastingvrye spaarplan by Corporate Guarantee.
- ▶ NAMPO kaartjies.

Invordering van heffing

Heffings word op die volgende wyses ingesamel:

DEUR INVORDERINGSAGENTE

Invorderingsagente is maatskappye waar graan gelewer word. Graan SA sluit kontrakte met die organisasies waar hulle onderneem om met toestemming van die produsente heffings te verhaal by die eerste punt van lewering en dit binne 'n sekere tyd aan Graan SA oor te betaal. Die logo's van Graan SA se vennote verskyn in **Figuur 1**.

DIREKTE OORBETALINGS

Lede kan ook hul heffings direk aan Graan SA oorbetal by wyse van tjek, deposito of elektroniese oorbetalings. Die metode van betaling is veral gepas waar produsente se graan bemark word aan partye wat nie deel vorm van Graan SA se heffingstrukture nie.

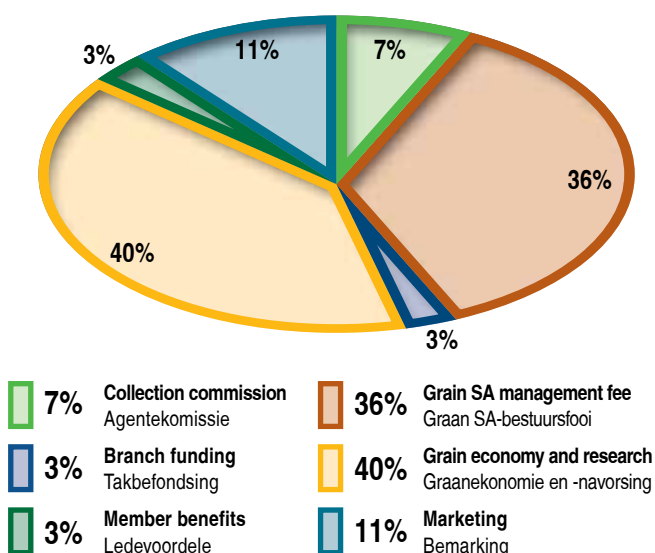
FIGURE 1 – Grain SA levy agents as at 30 September 2019.
FIGUUR 1 – Graan SA-heffingsagente soos op 30 September 2019.



Employment of levy

The employment of the levy is approved by members only at the annual Congress. **Graph 1** indicates how the levy was employed during the Congress year.

GRAPH 1 – Employment of levies in the 2018/2019 marketing year.
GRAFIEK 1 – Aanwending van heffings in die 2018/2019-bemarkingsjaar.



The biggest part of the levy fund (40%) is employed for research and development by the Grain Economy and Research divisions.

A large portion (36%) is also used for affiliations and to support the Executive in the functions they carry out. The levy fund is further used for marketing actions, member benefits and commission for the collection agents contributing to collecting the levies for Grain SA. Marketing actions are launched throughout the year to develop and promote the image of Grain SA and of agriculture in general.

We assure members that the levy is used purely for promoting members' interests, and Grain SA feels strongly that the employment of funds should be driven by the members, who represent the organisation.

Aanwending van die heffing

Die aanwending van die heffing word alleenlik deur lede goedgekeur tydens die jaarlikse kongres. **Grafiek 1** dui aan hoe die heffing aangewend is tydens die kongresjaar.

Die grootste gedeelte van die heffingsfonds (40%) word aangewend vir navorsing en ontwikkeling deur die Graanekonomie- en Navorsing-afdelings.

'n Groot gedeelte (36%) word ook aangewend vir affiliasies en om Hoofbestuur te ondersteun met funksies deur hulle verrig. Verder word die heffingsfonds aangewend vir bemarkingsaksies, ledevoordele en kommissie vir die invorderingsagente, wat help om die heffings vir Graan SA in te vorder. Bemarkingsaksies word deur die jaar geloods om die beeld van Graan SA en landbou in die geheel uit te bou en te bevorder.

Lede kan verseker wees dat die heffing aangewend word suiwer om lede se belange te bevorder en Graan SA voel sterk daarvoor dat die aanwending van die fondse deur die lede wat die organisasie verteenwoordig, gedryf moet word.

Ledestatistiek

GRAAN SA

Tydens Kongresjaar van 2018/2019 het die getal opbetaalde lede afgeplat sedert die vorige Kongresjaar. Dit is grootliks toe te skryf aan die uitdagende seisoen wat ervaar is en produsente wat alternatiewe gewasse verbou het. Die getal lede wat die heffing, maar nie die minimum bedrag betaal het nie, het egter afgeneem – wat positief is. Die totale getal lede het ook fluks toegeneem sedert die vorige jaar.

Die getal opbetaalde studiegroeplede het sedert die vorige termyn toegeneem. Graan SA bedank elke lid vir sy/haar bydrae tot 'n organisasie wat 'n kritiese rol speel in die volhoubaarheid van graanproduksie in Suid-Afrika.

Belanghebbendes

- Departement van Landbou, Bosbou en Visserye (DLBV)
- Departement van Landbou, Grondhervorming en Landelike Ontwikkeling (DALRRD)
- Departement van Handel en Nywerheid (DHN)
- Tesourie
- Suid-Afrikaanse Inkomstediens (SAID)
- Internasionale Handelsadministrasie-kommissie (IHIK)
- Nasionale Landbou-bemarkingsraad (NLBR)
- Nasionale Oesskatting-komitee (NOK)
- Suid-Afrikaanse Nasionale Saadorganisasie (SANSOR)
- CropLife SA
- Kunsmisvereniging van Suid-Afrika (FERTASA)

Member statistics

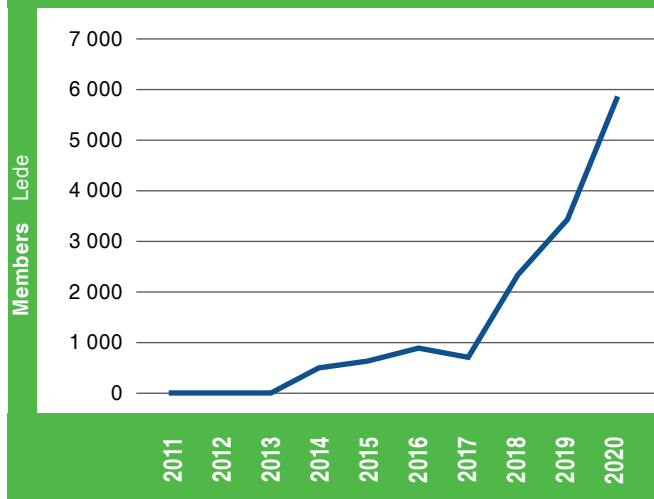
GRAIN SA

During the 2018/2019 Congress year the number of paid-up members evened out compared to the previous Congress year. This can be largely attributed to the challenging season that was experienced, and producers who planted alternative crops. However, the number of members who paid the levy but not the minimum amount decreased – which is positive. The total number of members also increased well since the previous year.

The number of paid-up study-group members has increased since the previous term. Grain SA thanks every member for their contribution to an organisation that plays a critical role in the sustainability of grain production in South Africa.

GRAPH 3 – Grain SA study group members, 2018/2019.

GRAFIEK 3 – Graan SA-studiegroeplede, 2018/2019.

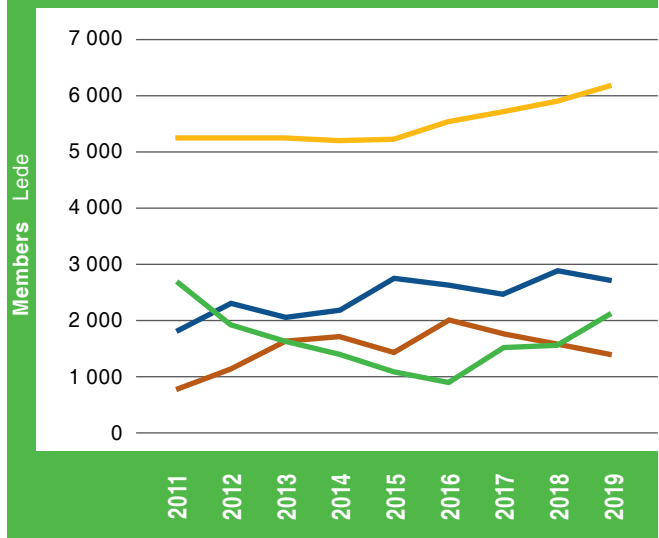


Stakeholders

- ▶ Department of Agriculture, Forestry and Fisheries (DAFF)
- ▶ Department of Agriculture, Land Reform and Rural Development (DALRRD)
- ▶ Department of Trade and Industry (dti)
- ▶ Treasury
- ▶ South African Revenue Services (SARS)
- ▶ International Trade Administration Commission (ITAC)
- ▶ National Agricultural Marketing Council (NAMC)
- ▶ National Crop Estimates Committee (CEC)
- ▶ South African National Seed Organisation (SANSOR)
- ▶ CropLife SA
- ▶ Fertiliser Association of South Africa (FERTASA)
- ▶ South African Agricultural Machinery Association (SAAMA)
- ▶ Commodity forums
- ▶ Protein Research Foundation (PRF)
- ▶ Bureau for Food and Agricultural Policy (BFAP)
- ▶ Agribusinesses
- ▶ Input providers
- ▶ Grain dealers
- ▶ Levy collection agents
- ▶ NAMPO exhibitors
- ▶ Agricultural Writers' Association of South Africa
- ▶ Agri SA
- ▶ Provincial agricultural unions
- ▶ Southern African Grain Laboratory (SAGL)
- ▶ South African Grain Information System (SAGIS)
- ▶ JSE – Safex
- ▶ National Chamber of Milling (NCM)

GRAPH 2 – Paid-up Grain SA members for the 2018/2019 marketing year.

GRAFIEK 2 – Opbetaalde Graan SA-lede vir die 2018/2019-bemarkingsjaar.



- ▶ Fully paid-up (Vol opbetaal)
- ▶ Partially paid (Gedeeltelik betaal)
- ▶ Non paid-up members (active only) (Nie-opbetaalde lede (slegs aktief))
- ▶ Total (Totaal)

- ▶ SA Landboumasjinerieassosiasie (SALMA)
- ▶ Kommoditeit-forums
- ▶ Proteïen Navorsingstigting (PNS)
- ▶ Buro vir Voedsel- en Landboubeleid (BFAP)
- ▶ Landboubesighede
- ▶ Insetverskaffers
- ▶ Graanhandelaars
- ▶ Heffing-invorderingsagente
- ▶ NAMPO-uitstallers
- ▶ Landboukrywersvereniging van Suid-Afrika
- ▶ Agri SA
- ▶ Provinsiale landbou-unies
- ▶ Suider-Afrikaanse Graanlaboratorium (SAGL)
- ▶ Suid-Afrikaanse Graaninligtingstelsel (SAGIS)
- ▶ JSE – Safex
- ▶ Nasionale Meulenaarskamer (NMK)
- ▶ Suid-Afrikaanse Graan en Oliesade Handelsvereniging (SACOTA)
- ▶ Agbiz
- ▶ Vereniging van Veevoervervaardigers (AFMA)
- ▶ Kommoditeitsorganisasies
- ▶ Kommoditeitstrusts
- ▶ TLU
- ▶ SA Kultivar- en Tegnologie-agentskap (SACTA)
- ▶ Landbounavorsingsraad (LNR)

KOMMUNIKASIE EN OPENBARE BETREKKINGE

Graan SA se openbarebetrekkingestrategie is steeds gefokus op kommunikasie-aktiwiteite, aksies en kanale waar die organisasie sigbaar en relevant bly en 'n verskil maak aan lede, die wêreldwye graan- en landbougemeenskap asook die publiek. Die innoverende en konsekwente verspreiding van inligting intern onder lede en ekstern onder landbouvennote en belanghebbendes bly belangrik – met 'n sterk fokus op blootstelling, betrokkenheid, invloed, impak en voorspraak.

Fokusareas

- ▶ **Kommunikeer die huidige**
- ▶ **Kommunikeer konsekwent**
- ▶ **Kommunikeer die Graan SA-handelsmerk**

- ▶ South African Cereals and Oilseeds Trade Association (SACOTA)
- ▶ Agbiz
- ▶ Animal Feed Manufacturers Association (AFMA)
- ▶ Commodity organisations
- ▶ Commodity trusts
- ▶ TAU
- ▶ South African Cultivar and Technology Agency (SACTA)
- ▶ Agricultural Research Council (ARC)

COMMUNICATION AND PUBLIC RELATIONS

Grain SA's public relations strategy remains focused on communication activities, actions and channels where the organisation remains visible, relevant and makes a difference to members, the global grain and agricultural community and the public. Innovative and consistent information sharing amongst members internally and agricultural partners and stakeholders externally persisted, with a strong focus on exposure, engagement, influence, impact and advocacy.

Focus areas

- ▶ **Communicating the present**
- ▶ **Communicating consistently**
- ▶ **Communicating Brand Grain SA**
- ▶ **Communicating #ProudlyGrainSA**
- ▶ **Communicating to stakeholders**
- ▶ **Communicating transparently**
- ▶ **Communicating impact and success**
- ▶ **Communicating creatively**
- ▶ **Communicating to collaborate**
- ▶ **Communicating to measure**

OUR PUBLIC RELATIONS ACTIVITIES IN THE YEAR UNDER REVIEW, SUCCESSFULLY ACHIEVED THE FOLLOWING:

- ▶ Provided ongoing media liaison support to the Grain SA Executive in order to further build on existing relationships with print, broadcast and electronic media channels.
- ▶ Provided support to Congress, NAMPO Harvest Day, NAMPO Cape, NAMPO ALFA and Swartland Show and organised the Day of Celebration and Grain Producer of the Year functions.
- ▶ Emphasised the role of the grain producer with a focus on national food security whilst raising the organisation's profile through media activities complementing the broader communication strategy.
- ▶ Built on the organisation's knowledge management systems including the various websites and email communication platforms.
- ▶ Rolled-out another short video series focussing on #Proudly Grain SA in order to highlight why members find the organisation of value with a focus on its propositions in order to instil a proud-member culture.
- ▶ Continued to steer through the much-debated topics of expropriation of land without compensation during the first half of the reporting period, to diesel prices, the breeding- and technology levy, the five-year drought cycle and the winter grain crop concerns towards the end of the reporting period.

Meaningful media liaison remains important in order to retain certain control in the organisation's contact with the media. This results in fostering an understanding of the organisation's current focusses and projects whilst effectively communicating the necessary background information on issues affecting the grain producers, through the media to the public.

Our accomplishments

- ▶ Expanded the organisation's online footprint through its communication channels and platforms, including the Grain SA website and the various NAMPO websites.
- ▶ Further built on establishing an ease-of-reference contact point directly with members through the organisation's exclusive digital membership card.
- ▶ Integrating communication efforts to underpin all our interactions as we worked to improve the quality of dialogues with each of our stakeholder groups.

- ▶ **Kommunikeer #TrotsGraanSA**
- ▶ **Kommunikeer met belanghebbendes**
- ▶ **Kommunikeer deursigtig**
- ▶ **Kommunikeer impak en sukses**
- ▶ **Kommunikeer kreatief**
- ▶ **Kommunikeer hoe ons saam- en meewerk**
- ▶ **Kommunikeer om te meet**

ONS OPENBAREBETREKKINGE-AKTIWITEITE HET IN DIE OORSIGJAAR MET SUKSES DIE VOLGENDE BEREIK:

- ▶ Deurlopende ondersteuning met mediaskakeling is aan die Graan SA-hoofbestuur verskaf om bestaande betrekkinge met die gedrukte, uitsaai- en elektroniese media te versterk.
- ▶ Steun is vir die Kongres, NAMPO Oesdag, NAMPO Kaap, NAMPO ALFA en die Swartland Skou verskaf en die Dag van Feesviering- en Graanprodusent van die Jaar-funksies is gereël.
- ▶ Die rol van die graanprodusent is beklemtoon met 'n fokus op nasionale voedselsekerheid terwyl die organisasie se profiel versterk is deur media-aktiwiteite wat die wyer kommunikasie-strategie aanvul.
- ▶ Die organisasie se kennisbestuurstelsels, insluitend die verskeie webwerwe en e-pos-kommunikasiplatforms, is verbeter.
- ▶ Nog 'n kort videoreeks is vervaardig met die fokus op #TrotsGraanSA ten einde te beklemtoon waarom lede die organisasie as waardevol beskou, met die fokus op Graan SA se waarde-aanbod en om 'n trotse ledekultuur te help vestig.
- ▶ Die veelbesproke onderwerp van grondonteiening sonder vergoeding is gedurende die eerste helfte van die verslagtydperk verder hanteer. Dieselprijs, die teling- en tegnologieheffing, die vyfjaar-droogtesiklus en bekommernisse oor die wintergraanoes is aan die einde van die verslagtydperk aangespreek.

Betekenisvolle skakeling met die media bly belangrik om 'n mate van beheer ten opsigte van die organisasie se kontak met die media uit te oefen. Dit lei tot die ontwikkeling en begrip van die organisasie se huidige fokuspunte en projekte, terwyl die nodige agtergrondinligting oor kwessies wat die graanprodusente raak doeltreffend deur die media aan die publiek oorgedra word.

Ons prestasies

- ▶ Die organisasie se aanlynvoetspoor is deur die kommunikasiekanale en platforms uitgebrei, insluitend deur Graan SA se webwerf en die onderskeie NAMPO-webwerwe.
- ▶ Verdere werk is gedoen om 'n maklike direkte kontakpunt met lede te vestig deur die organisasie se eksklusiewe digitale lidmaatskapkaart.
- ▶ Kommunikasiepogings is geïntegreer deur al ons interaksies te steun in ons poging om die gehalte van die gesprekke met elkeen van ons belangegroep te versterk.
- ▶ Die organisasie se sosialemediaplatforms is deurlopend uitgebrei, en sluit nou die hoof-profiel, die NAMPO Oesdag- en NAMPO Kaap-kanale, asook die onderskeie sosialemediaprofiel in.
- ▶ Deelname aan uitstallings en werksinkels waar teikengehore en fokusareas nie heeltemal met dié van die organisasie ooreenstem nie, is herevalueer. Die openbarebetrekkinge-aktiwiteite ondersteun gevolglik lede se bemerkingspogings by uitstallings, werksinkels en produsentedae met 'n teikengehoor en fokus wat by die organisasie se doelwitte aanklank vind. Dit het imbizo's ter ondersteuning van kommunikasie-inisiatiewe vir landbou-ontwikkeling, die Swartland Skou, die Swellendam Skou, Senwes Toekomsfokus, Iedegholfdag en verskeie Vroue in Landbou-inisiatiewe ingesluit.
- ▶ Die Nasie in Gesprek-inisiatief – 'n suksesvolle aktualiteitsbespreking oor landbou wat tydens NAMPO Oesdag uitgesaai word – is ondersteun en aan deelgeneem.
- ▶ Verdere pogings is aangewend om die kennisdatabasis wat op die bladsye van die *SA Graan/Grain*-tydskrif verskyn met teikengehore te deel deur top-artikels maandeliks op sosialemediaplatforms te publiseer en te bevorder. Dit het die geleentheid vir gesprekke en betrokkenheid rondom belangrike onderwerpe in die landbou-omgewing wesenlik vergroot.

- ▶ Continuously growing the organisation's social media platforms which have expanded to include the main accounts, NAMPO Harvest Day and NAMPO Cape channels, inclusive of the respective social media profiles.
- ▶ Re-evaluated participation in exhibitions and workshops whose target audiences and focus areas were not completely aligned with that of the organisation. To this end, the public relations activities support member marketing efforts at exhibitions, workshops and farmer's days with an aligned target audience and focus. These included imbizos in support of farmer development communication initiatives, the Swartland Show, Swellendam Show, Senwes Future Focus, membership golf days and various Women in Agriculture initiatives.
- ▶ Participated in and supported the Nation in Conversation initiative, a successful actuality agri-discussion broadcasted during the NAMPO Harvest Day.
- ▶ Undertook to continue sharing the knowledge database contained within the pages of the *SA Graan/Grain* magazine with target audiences, by publicising and promoting top articles monthly on social platforms. This has substantially increased the opportunity for discussion and engagements around important topics in the agricultural environment.
- ▶ Further improved the offering of the Grain SA exhibition area and Members' Hall at the NAMPO Harvest Day with a renewed focus on grain economy and member benefits, showcasing grain research and the policy environment, the goals of the Farmer Development Programme and nine crop specific focus areas. The NAMPO merchandise proved popular as ever with an expanded marketing and clothing range, proving yet again very successful in the NAMPO Hall.
- ▶ Successfully showcased the successes of all South African grain producers at outstanding functions.

Our communication

Grain SA aspires to continuously highlight the role of the South African grain producer, increase awareness about agriculture being a cornerstone of the economy, improving understanding of the organisation's value to its members and heightening public awareness of the producer's vital role in ensuring food security. The organisation's communication with members, facilitated through various channels, include a member newsletter, ad hoc electronic communication, news flashes and digital media offerings through social media and the exclusive membership card.

GRAIN SA ELECTRONIC COMMUNICATION

The *Perspective*-newsletter is distributed electronically to members and a selected group of interested stakeholders. It aims to share information, events and important dates and further provide a platform to communicate industry news timeously. The *News Flash* is utilised to distribute important and relevant information to members, timeously. This is particularly useful in instances where updates on important matters such as agricultural production conditions and bio-security are communicated.

PUBLICATIONS

Grain SA publishes *SA Graan/Grain* magazine, a specialist monthly publication and official mouthpiece of the organisation which is regarded as one of the leading agricultural publications. The magazine is used by readers as a knowledge partner and benchmark tool for sustainability in the grain and oilseed industry.

In the year under review, Grain SA also published the *Pula Imvula* – a monthly publication, in seven languages aimed at developing and New Era farmers.

The annual *Grain Guide*, with useful contacts and reference articles on seed, implements, fertilising, integrated pest management, livestock, money and financial services as well as Grain SA information including important contacts and an updated calendar for the coming year, is published annually as a value-add to grain producers.

Media liaison

The media community remains one of the organisation's key stakeholders as they are the most effective means of informing the public about the

- ▶ Die Graan SA-uitstalarea en Ledelokaal by die NAMPO Oesdag is verbeter, met nuwe fokus op graanekonomie en ledevoordele, graannavorsing en die beleidsomgewing, die doelwitte van die landbou-ontwikkelingsprogram, en nege gewas-spesifieke fokusareas. Die NAMPO-handelsware was so gewild soos altyd, met uitgebreide bemaking en 'n groter klerereeks wat weer eens baie suksesvol was in die NAMPO-saal.
- ▶ Die suksesse van alle Suid-Afrikaanse graanprodusente is by uitstaande funksies bevorder.

Ons kommunikasie

Graan SA streef daarna om deurlopend die rol van die Suid-Afrikaanse graanprodusent te beklemtoon, bewustheid te verhoog vir die feit dat landbou 'n hoeksteen van die ekonomie is, begrip te verbeter van die organisasie se waarde vir sy lede en die publiek se bewustheid van die produsent se noodsaaklike rol in die versekering van voedselsekerheid te verhoog. Die organisasie se kommunikasie met lede, wat deur verskeie kanale gefasiliteer word, behels 'n ledenuusbrief, ad hoc-elektroniese kommunikasie, nuusflits en digitale media-aankondigings deur sosiale media en die eksklusiewe lidmaatskapkaart.

GRAAN SA ELEKTRONIESE KOMMUNIKASIE

Die *Perspektief*-nuusbrief word elektronies aan lede en aan 'n geselekteerde groep belangstellende belanghebbendes versprei. Die doel is om inligting, gebeure en belangrike datums te deel en 'n platform te verskaf om nuus betyds aan die bedryf te kommunikeer. Die *Nuusflits* word gebruik om belangrike en relevante inligting betyds aan lede te versprei. Dit is veral nuttig waar die jongste nuus oor belangrike sake soos landbouproduksietoestande en biosekuriteit gekommunikeer word.

PUBLIKASIES

Graan SA publiseer *SA Graan/Grain*, 'n spesialis maandelikse publikasie en die amptelike spreekbuis van die organisasie. Dit word as een van die voorste landboupublikasies beskou. Die tydskrif word deur lesers as 'n kennisvennoot en metingsinstrument vir volhoubaarheid in die graan- en oliesadebedryf gebruik.

In die oorsigjaar het Graan SA ook *Pula Imvula* – 'n maandelikse publikasie wat in sewe tale vertaal word en op ontwikkelende en Nuwe Era boere gemik is – uitgegee.

Die jaarlikse *Graangids*, wat nuttige kontakte en artikels oor saad, werktuie, bemesting, geïntegreerde plaagbeheer, lewendehawe, geld en finansiële dienste asook inligting oor Graan SA bevat, waaronder belangrike kontakte en 'n bygewerkte kalender vir die komende jaar, word gepubliseer om vir graanprodusente waarde toe te voeg.

Mediaskakeling

Die mediagemeenskap bly een van die organisasie se sleutelbelanghebbendes, aangesien dit die doeltreffendste manier is om die publiek oor die organisasie se aktiwiteite in te lig. Deur betrokkenheid by media-eienaars oor alle platforms heen is sosiale, digitale en tradisionele kanale





organisation's activities. Through engagements with media owners across all platforms, social, digital and traditional channels were used to ensure improved accessibility and increased activity of the organisation's strategic focus areas.

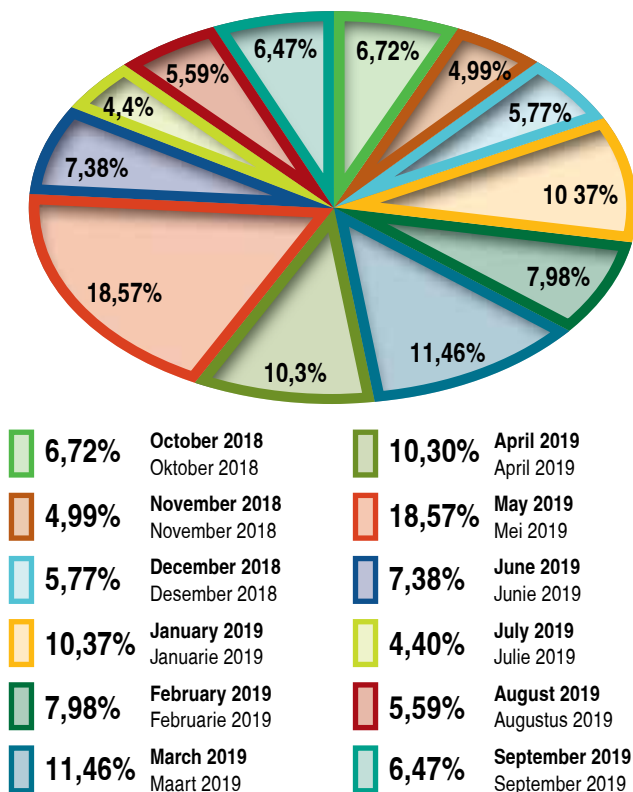
Press releases issued were fully utilised, resulting in numerous regular interviews across print, broadcast and online platforms as well as general news coverage valued at an advertising value equivalent (AVE) amount of R94 859 223. The resulting numbers are the equivalent of what an organisation would have paid if it placed an advertisement of that size or time period. By assessing media coverage in this way, and aggregating the calculations, a value can be assigned to the coverage received within a specified time period.

Throughout the reporting period, Grain SA's media coverage month-on-month indicate the majority of print, broadcast and online coverage generated during the months of January 2019, and March 2019 through to May 2019.

Further, Grain SA's circulation on all print, broadcast and online news platforms accumulated to **831 million**, combined over the twelve-month period with the majority of coverage generated by Grain SA Executives quoted in the media (**Graph 5** on page 24).

In the local press, Grain SA's publication word cloud changed dramatically over the reporting period with a general focus on NAMPO, wheat, food and agriculture, compared to the previous period's focus on land. Relevance of topics relating to South African grain production remain consistent in the word cloud, indicating a distinct emphasis on topics and discussions relevant to the organisation's strategic focus areas.

GRAPH 4 – Month-on-month media coverage.
GRAFIEK 4 – Maand-tot-maand-mediadekking.



gebruik om beter toegankelijkheid en groter aktiwiteit van die organisasie se strategiese fokusareas te verseker.

Persverklarings wat uitgereik is, is ten volle benut, en het tot talle gewone onderhoude op die druk-, uitsaai- en aanlynplatforms gelei, asook algemene nuusdekking wat op 'n advertensiewaarde-ekwivalent (AVE) van R94 859 223 gewaardeer word. Die gevolglike syfers is die ekwivalent van wat 'n organisasie sou betaal het indien 'n advertensie van daardie grootte of in daardie tydperk geplaas is. Deur mediadekking op hierdie manier te evalueer en die totaal van die berekeninge te kry, kan 'n waarde geheg word aan die dekking wat in 'n spesifieke tydperk bereik is.

FIGURE 2 – Grain SA's advertising value equivalent spend.

FIGUUR 2 – Graan SA se advertensiewaarde-ekwivalentbesteding.



Regdeur die verslagtydperk dui Graan SA se mediadekking van maand tot maand die meeste van die druk-, uitsaai- en aanlyndekking aan wat regdeur die maande van Januarie 2019, en Maart 2019 tot Mei 2019 gegenereer is.

Graan SA se geraamde sirkulasie op alle druk-, uitsaai- en aanlyn nuusplatforms het 'n gekombineerde **831 miljoen** beloop oor die twaalfmaande-tydperk, met die meeste van die dekking wat gegenereer is deur Graan SA se uitvoerende beamptes wat in die media aangehaal is (**Grafiek 5** op bladsy 24).

In die plaaslike pers het Graan SA se publikasiewoordwolk dramaties verander oor die verslagtydperk, met 'n groot fokus op NAMPO, koring, voedsel en landbou, vergeleke met die vorige tydperk se fokus op grond. Die tersaaklikheid van onderwerpe ten opsigte van Suid-Afrikaanse graanproduksie bly konsekwent in die woordwolk, wat 'n duidelike klem aandui op onderwerpe en gesprekke wat op die organisasie se strategiese fokusareas betrekking het.

DRUK- EN UITSAAIMEDIA

Graan SA se algehele mediadekking vir die oorsigtydperk het met 2% toeneem. Die totale gekombineerde mediadekkingstelling vir die verslagtydperk het tot 2 826 toeneem vanaf die vorige jaar se 2 784.

Individuele syfers vir druk-, uitsaai- en aanlynmedia se AVE het 'n gekombineerde totale AVE-geldwaarde van R94 859 223 miljoen gehad, met 'n afname van 14% vir gedrukte media, 'n toename van 15% vir uitsaai- en 'n afname van 14% vir aanlynmedia. Graan SA se AVE het oor die afgelope verslagtydperk nie beduidend gedaal nie, soos in **Grafiek 7** (op bladsy 24) getoon word.

SOSIALE MEDIA

Graan SA het voortgegaan om sy aanlynplatforms te versterk en het sy sosialemedia-kommunikasiekanale ten volle benut. Die digitalemedia-strategie is deurlopend geëvalueer namate die jaar gevorder het, met die

GRAPH 5 – Grain SA media coverage mentions by executive officers.

GRAFIEK 5 – Melding van Graan SA in die media deur uitvoerende beamptes.

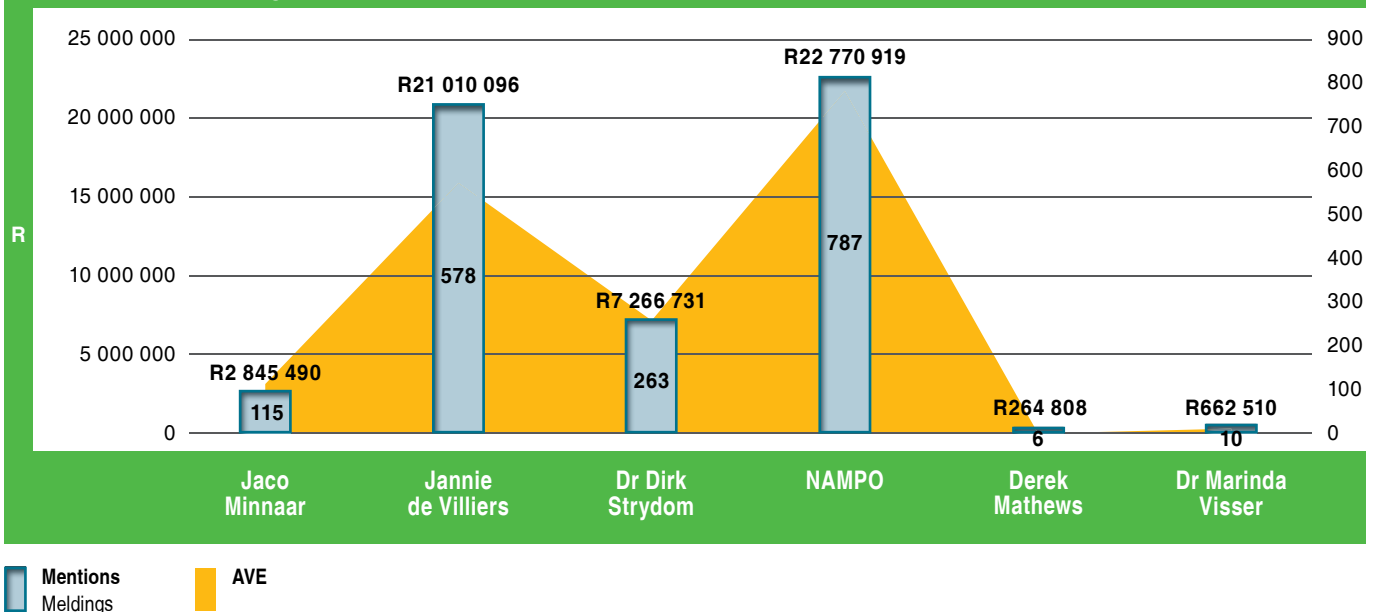


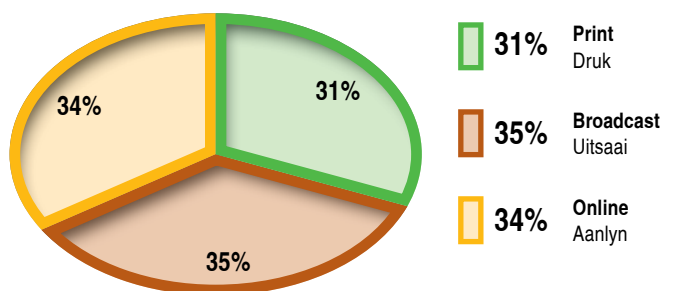
FIGURE 3 – Grain SA word cloud 2018/2019.

FIGUUR 3 – Graan SA-woordwolk 2018/2019.



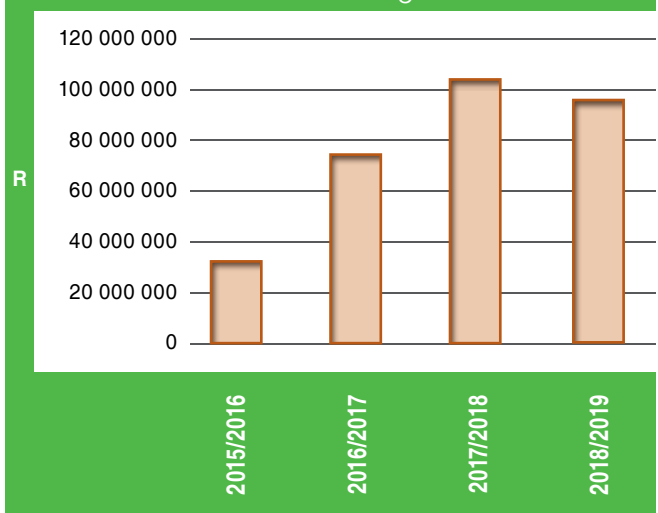
GRAPH 6 – Grain SA media coverage.

GRAFIEK 6 – Graan SA-mediadekking.



GRAPH 7 – Grain SA AVE monetary value.

GRAFIEK 7 – Graan SA se AVE-geldwaarde.



PRINT AND BROADCAST MEDIA

For the period under review, Grain SA's overall media coverage increased by 2%. The total combined media coverage for the reporting period increased to 2 826 from the previous year's 2 784.

Individual results for print, broadcast and online media's AVE had a combined total monetary AVE value of R94 859 223 million, with a 14% decrease in print, 15% increase in broadcast and 14% decrease in online media. Grain SA's AVE has decreased insignificantly over the past reporting period as illustrated in **Graph 7**.

SOCIAL MEDIA

Grain SA continued to strengthen its online platforms and utilised social media communication channels fully. The digital media strategy was assessed continuously as the year progressed, focussing on information transfer, engagement, community building, brand awareness and reputation management, education and to build a far-reaching online presence by simplifying content sharing between our target audience and their networks.

It aims to drive higher awareness of Grain SA and its member services. Grain SA is now active on four key platforms (Facebook, Twitter, Instagram and YouTube) with over 41 000 fans and followers across all platforms – a 14% increase for the period under review.

fokus hoofsaaklik op inligtingoordrag, betrokkenheid, gemeenskapsbou, handelsmerkbewustheid en reputasiebestuur, opvoeding, en om 'n ver-reikende aanlyn teenwoordigheid op te bou deur die deel van inhoud tussen ons teikengehoor en hulle netwerke te vereenvoudig.

During the year under review, activity on the @GrainSA Twitter account increased by 25%. In addition to tweeting during all major Grain SA events, such as Congress, NAMPO, Day of Celebration and the Grain Producer of the Year, the account is also used to disseminate daily market and fuel reports.

With the integration of the Grain SA social media and web platforms, cross-sharing have been simplified. The Grain SA Facebook page remains the more popular platform, even marginally, with members interacting with the organisation and fellow social media users on a daily basis. Both interactions with community members as well as its impact has increased substantially.

Occasions and events

Grains SA hosted a multitude of events and leveraged the opportunity to communicate and network with the media, government representatives, suppliers, agri-businesses, partners and the public at large. Entering into a couple of new ventures and partnering with existing ones, Grain SA yet again had a busy event calendar for the year under review.

NAMPO HARVEST DAY

The 53rd NAMPO Harvest Day lived up to its theme 'Platform for your agri future', and boasted 775 exhibitors, 50 of whom were international exhibitors.

The Harvest Day was well publicised bringing urban South Africa ever so closer to agriculture. The Grain SA and NAMPO Experience Centre showcased the organisation's activities and focus areas and the NAMPO merchandise sales, with its second year in the NAMPO Hall once again remained as popular as ever.

Grain SA hosted its annual learner programme, for the fourth year running, with a stern commitment to learner development in the fields of social media marketing and communication for future growth and entrepreneurship.

A total of ten Grade 11 learners from the NAMPO Combined Agricultural School in Bothaville, had the opportunity to attend practical digital training, whilst working as interns at the NAMPO Harvest Day with the social media team. This provided the interns with the opportunity to expand and apply their newly acquired knowledge over the four days. The aim of the course and subsequent internship was to train the students in the safe and effective use of social media as a medium of earning some extra pocket money in their local communities.

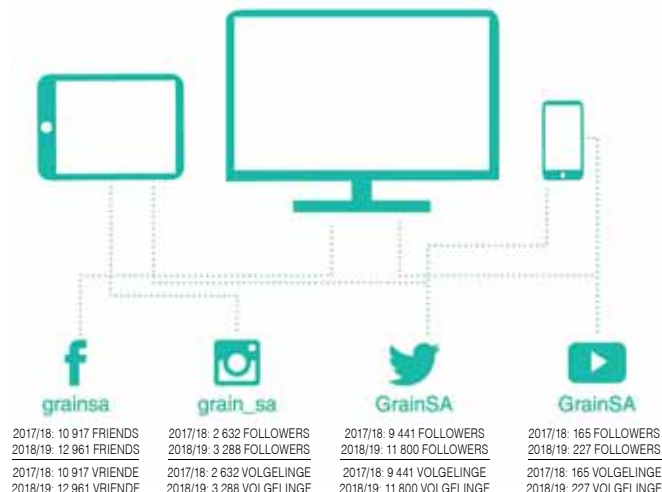
NAMPO CAPE

The second NAMPO Cape show was hosted from 4 to 6 September 2019 in co-operation with the Bredasdorp Park NPC in Bredasdorp. 20 250 visitors attended this prestigious event over the three days. Taking the best of what NAMPO has to offer up north, Grain SA once again presented a showcase like no other in the south with 435 exhibitors spread over the 480 available exhibition spaces. Primarily a business show, positive feedback from exhibitors on successful business transactions remains the most accurate measure of success.

With the continued commitment of the agri-businesses as well as all the major tractor and implement manufacturers, NAMPO Cape

FIGURE 5 – Grain SA social and digital media platforms.

FIGUUR 5 – Graan SA se sosiale- en digitale mediaplatforms.



Die doel is om groter bewustheid van Graan SA en sy ledeenste te skep. Graan SA is nou op vier belangrike platforms aktief (Facebook, Twitter, Instagram en YouTube), met meer as 41 000 aanhangers en volgelinge oor al die platforms – 'n toename van 14% vir die verslagtydperk.

In die oorsigjaar het die aktiwiteit op die @GrainSA Twitter-rekening met 25% toegeneem. Benewens twiets tydens alle groot Graan SA-geleenthede soos Kongres, NAMPO, die Dag van Feesviering en die Graanprodusent van die Jaar, word die rekening ook gebruik om daaglikse mark- en brandstofverslae te versprei.

Met die integrasie van Graan SA se sosialemedia- en webplatform is oorkruisdeling (*cross-sharing*) vereenvoudig. Die Graan SA Facebook-blad is met 'n kortkop voor steeds die gewildste platform en lede bly op 'n daaglikse grondslag met die organisasie en ander sosialemediagebruikers in verbinding. Interaksie met lede van die gemeenskap asook die impak daarvan het wesenlik toegeneem.

Gebeure en geleenthede

Graan SA het talle gebeurtenisse aangebied en die geleentheid gebied om met die media, regeringsverteenvoordigers, verskaffers, landboubesighede, vennote en die algemene publiek te kommunikeer en netwerke te bou. In 'n besige funksiekalender het Graan SA in die oorsigjaar 'n aantal nuwe projekte begin en vennootskappe met bestaande projekte gesluit.

NAMPO OESDAG

Die 53ste NAMPO Oesdag het sy tema, Platform vir jou landbou-toekoms, gestand gedoen en met 775 uitstallers gespog, van wie 50 internasionale uitstallers was.



Grain SA's CEO, Jannie de Villiers, with the scholars who attended the 2019 NAMPO Learner Programme.
Graan SA se HUB, Jannie de Villiers, saam met die leerders wat die 2019 NAMPO Leerderprogram bygewoon het.

showcased the newest technology in exhibitions of exceptional quality. Non-profit organisations, including schools and churches, operated the food and refreshment stations, as per NAMPO tradition, benefiting the local NPO's.

GALA AWARDS

Grain SA celebrated the successes of its grain producers during two prestigious and jubilant celebratory events, held at NAMPO Park and in Boksburg on 2 October and 25 October 2019 respectively. These events attended by a wide variety of stakeholders and emerging grain producers, offer Grain SA the opportunity to honour the development, growth and achievements of its developing and commercial grain producers.

Day of Celebration

Consisting of four categories, the Day of Celebration honours **Subsistence, Smallholder, Potential Commercial and New Era Commercial farmers** and their contribution to the country's food security. The respective categories from this year onwards, differentiate between the Subsistence category (grain farmers who farm up to 3 ha), the Smallholder category (grain farmers who farm on 3 ha to 35 ha), Potential Commercial farmers (grain farmers who farm on more than 35 ha and produce less than 250 tons) and New Era Commercial farmers (grain farmers who produce more than 250 tons of grain).

Grain Producer of the Year

Celebrating the cream of the country's grain producing crop, this prestigious gala evening commemorated the 20th year of the grain awards, giving recognition to grain producers who form the basis of food security in South Africa and who above all trials and tribulations, farm with excellence. In addition, the finalists serve as excellent role models to the younger generation of producers whilst the image of the grain producer is enhanced. It further recognises successful grain producers who manage their businesses with such passion and dedication, so as to set an example and serve as inspiration to other producers.

2019 Gala Awards winners

- ▶ **Grain SA/Syngenta Grain Producer of the Year**
Tonie Linde and Willie Beukes from Caledon, Western Cape
- ▶ **Grain SA/Absa/John Deere Financial New Era Commercial Farmer of the Year**
Andries van der Poll, Riebeeck West, Western Cape



Andries van der Poll (Grain SA/Absa/John Deere Financial New Era Commercial Farmer of the Year); Mdumiseni Welcome Hadebe (Grain SA Smallholder Farmer of the Year); Mazonya Elijah Dhlamini (Grain SA/Absa/John Deere Financial Subsistence Farmer of the Year) and Sabatha Ewart Mthethwa (Grain SA/Bayer Potential Commercial Farmer of the Year).

Andries van der Poll (Graan SA/Absa/John Deere Financial Nuwe Era Kommersiële Boer van die Jaar); Mdumiseni Welcome Hadebe (Graan SA Kleinskaalse Boer van die Jaar); Mazonya Elijah Dhlamini (Graan SA/Absa/John Deere Financial Bestaansboer van die Jaar) en Sabatha Ewart Mthethwa (Graan SA/Bayer Potensiële Kommersiële Boer van die Jaar).

Die Oesdag het baie publisiteit gekry en bring stedelike Suid-Afrika steeds nader aan landbou. Die Graan SA en NAMPO Ervaringsentrum het die organisasie se aktiwiteite en fokusgebiede ten toon gestel, en die NAMPO-handelswareverkope – vir die tweede jaar in die NAMPO Saal – was net so gewild soos altyd.

Graan SA het weer vir die vierde agtereenvolgende jaar sy jaarlikse leerderprogram aangebied, met 'n sterk verbintenis tot leerderontwikkeling op die gebiede van sosialemediabemarking en kommunikasie vir toekomstige groei en entrepreneurskap.

Altesaam tien graad 11-leerders van die NAMPO Gekombineerde Landboukool op Bothaville het die geleentheid gehad om praktiese digitale opleiding te ondergaan terwyl hulle saam met die sosialemediaspan by die NAMPO Oesdag gewerk het. Dit het aan die interns die geleentheid gegee om hulle nuutverworwe kennis oor die vier dae uit te brei en toe te pas. Die doel van die kursus en daaropvolgende internskap was om die leerders tuiwys te maak om sosiale media doeltreffend te gebruik as 'n manier om in hulle plaaslike gemeenskappe 'n bietjie ekstra sakgeld te verdien.

NAMPO KAAP

Die tweede NAMPO Kaap-skou is vanaf 4 tot 6 September 2019 in samewerking met die Bredasdorp Park MSW op Bredasdorp aangebied. 20 250 besoekers het hierdie spoggeleentheid oor drie dae bygewoon. Met die beste wat NAMPO in die noorde aanbied as inspirasie, het Graan SA weer eens 'n unieke skou in die suide aangebied, met 435 uitstallers oor die 480 beskikbare uitstalruimtes versprei. Aangesien dit primêr 'n sakeskou is, bly positiewe terugvoering van uitstallers oor suksesvolle saketransaksies die akkuraatste maatstaf van sukses.

Met die voortgesette toewyding van agri-besighede asook al die belangrikste vervaardigers van trekkers en implemente, is die nuutste tegnologie deur uitstallings van uitsonderlike gehalte by NAMPO Kaap vertoon. Niewinsgewende organisasies, insluitend skole en kerke, het die kos en verversingstalletjies volgens NAMPO-tradisie tot voordeel van die plaaslike niewinsgewende organisasies bedryf.

GALATOEKENINGS

Graan SA het die suksesse van sy graanprodusente tydens twee prestige geleenthede op 2 Oktober en 25 Oktober 2019 op NAMPO Park en in Boksburg onderskeidelik gevier. Hierdie gebeurtenisse, wat deur 'n wye verskeidenheid belanghebbendes en opkomende graanprodusente



Antonie Delpont (Managing Director, Syngenta SA), Willie Beukes, Jaco Minnaar (Chairperson, Grain SA), Tonie Linde and Jannie de Villiers (Chief Executive Officer, Grain SA).

Antonie Delpont (Besturende Direkteur, Syngenta SA), Willie Beukes, Jaco Minnaar (Voorsitter, Graan SA), Tonie Linde en Jannie de Villiers (Uitvoerende Hoofbestuurder, Graan SA).



Guests at the Day of Celebration (left) and Edwin Thulo Mahlatsi (far right), the 2017 New Era Farmer of the Year, with his wife, Othenia and daughter, Doreen.
Gaste tydens die Dag van Feesviering (links) en Edwin Thulo Mahlatsi (heel regs), die Nuwe Era Kommersiële Boer van die Jaar 2017, saam met sy vrou, Othenia en dogter, Doreen.

- **Grain SA/Bayer Potential Commercial Farmer of the Year**
Sabatha Ewart Mthethwa, Dannhauser, KwaZulu-Natal
- **Grain SA Smallholder Farmer of the Year**
Mdumiseni Welcome Hadebe, Estcourt, KwaZulu-Natal
- **Grain SA/Absa/John Deere Financial Subsistence Farmer of the Year**
Mazonya Elijah Dhlamini, Amersfoort, Mpumalanga

Inspiration award

In addition to these awards, Grain SA also used the opportunity to honour Dr René Uys and Harry van der Merwe, presenters of the Grain Academy, with the **2019 Grain SA Inspiration Award**. The award was presented in appreciation of their leadership and establishment of a platform for young leaders in agriculture to develop their skills and to share their stories and in the process heal relationships in South Africa.

Other events

In addition to these events, Grain SA further participated in the Senwes Future Focus, membership golf days and various women in agriculture initiatives with the provincial agricultural women's unions.



Dr René Uys and Harry van der Merwe received the Grain SA Inspiration Award. With them are Jannie de Villiers and Ramodisa Monaisa (Vice-chairperson, Grain SA).
Dr René Uys en Harry van der Merwe het die Graan SA Inspirasietoekenning ontvang. Saam met hulle is Jannie de Villiers en Ramodisa Monaisa (Visevoorsitter, Graan SA).



bygewoon is, bied aan Graan SA die geleentheid om die ontwikkeling, groei en prestasies van sy ontwikkelende en kommersiële graanprodusente te beloon.

Dag van Feesviering

Die Dag van Feesviering, wat uit vier kategorieë bestaan, vereer **Bestaans-, Kleinskaalse, Potensiële Kommersiële en Nuwe Era Kommersiële boere** en hulle bydrae tot die land se voedselsekerheid. Die verskillende kategorieë onderskei vanaf hierdie jaar tussen die Bestaanskategorie (graanboere wat tot op 3 ha boer), die Kleinskaalse kategorie (graanboere wat op 3 ha tot 35 ha boer), Potensiële Kommersiële boere (graanboere wat op meer as 35 ha boer, maar minder as 250 ton produseer), en Nuwe Era Kommersiële boere (graanboere wat meer as 250 ton graan produseer).

Graanprodusent van die Jaar

Hierdie gesogte gala-aand vier die room van die land se graanproduseerders, en het die 20ste jaar van die graantoekennings gedenk. Hierdie toekenningsaand gee erkenning aan graanprodusente wat die basis van voedselsekerheid in Suid-Afrika vorm en wat, ongeag die probleme en terugslae, met uitnemendheid boer.

Die finaliste dien ook as uitstekende rolmodelle vir die jonger geslag produsente, terwyl die beeld van die graanprodusent verbeter word. Die geleentheid bied verder erkenning aan suksesvolle graanprodusente wat hulle ondernemings met soveel passie en toewyding bestuur om as inspirasie vir ander produsente te dien.

Wenners van die 2019-galatoekennings

- **Graan SA/Syngenta Graanprodusent van die Jaar**
Tonie Linde en Willie Beukes van Caledon, Wes-Kaap
- **Graan SA/Absa/John Deere Financial Nuwe Era Kommersiële Boer van die Jaar**
Andries van der Poll, Riebeeck-Wes, Wes-Kaap
- **Graan SA/Bayer Potensiële Kommersiële Boer van die Jaar**
Sabatha Ewart Mthethwa, Dannhauser, KwaZulu-Natal
- **Graan SA/Syngenta Kleinskaalse Boer van die Jaar**
Mdumiseni Welcome Hadebe, Estcourt, KwaZulu-Natal
- **Graan SA/Absa/John Deere Financial Bestaansboer van die Jaar**
Mazonya Elijah Dhlamini, Amersfoort, Mpumalanga

Inspirasietoekenning

Benewens hierdie toekennings het Graan SA ook die geleentheid gebruik om dr René Uys en Harry van der Merwe, aanbieders van die Graanakademie, met die **2019 Graan SA Inspirasietoekenning** te vereer. Die toekenning is gemaak om waardering te toon vir hulle leierskap en die vestiging van 'n platform vir jong leiers in landbou om hulle vaardighede te ontwikkel en hulle verhare te deel en in dié proses, verhoudings in Suid-Afrika te genees.

Ander gebeure

Benewens hierdie geleenthede het Graan SA ook aan die Senwes Toekomsfokus en ledegholfdag, en saam met die provinsiale vrouelandbou-unies aan verskeie inisiatiewe van vroue in landbou deelgeneem.

Consortia and research network established and gaining momentum

CONSORTIA AND MULTI-STAKEHOLDER PARTNERSHIPS

Crop improvement, crop protection, biosecurity, climate resilience and conservation agriculture are the main research priority focus areas of Grain SA. The department's primary objective is to establish research consortiums that drive innovation to enhance the productivity, profitability and sustainability of South African grain and oilseed producers and benefit the industry as well as South Africa. Feedback and progress of the consortiums are provided below.

Crop improvement: Wheat breeding

South Africa's area planted to wheat decreased with an alarming trend the last 30 years due to immense pressure on profitability. The Department of Science and Innovation (DSI) and Grain SA therefore committed to the development of a platform to drive improved wheat yields in South Africa.

The Wheat Breeding Platform (WBP) was established in 2014 as a consortium consisting of both public and private partners. It ultimately seeks to increase wheat production through the development of germplasm with targeted yield improvement as well as drought and heat tolerance. Germplasm with targeted improvements are developed using a pre-breeding approach, and subsequently provided to wheat breeders for inclusion into breeding programmes and development of new cultivars.

STRATEGIC PUBLIC-PRIVATE PARTNERSHIP

The WBP is a joint initiative between government and industry and is part of DSI's efforts to implement the South African Bio-economy Strategy. The platform has been co-funded by industry for the last five years from the Winter Cereal Trust (WCT). Other partners include the Agricultural Research Council (ARC), Sensako, Pannar and Stellenbosch University.

CONTRIBUTION TO AGRICULTURE

An estimate of 300 selections have been made by seed companies from the WBP material, and has been incorporated into the breeding programmes of the ARC, Sensako and Pannar.

CONSORTIUM HIGHLIGHTS OF 2019

Human capital development

The programme currently hosts a post-doctoral fellow, a PhD student, five MSc students and six BSc Hons/BSc Agric students. Three graduates from the programme have obtained employment in industry, of which one is employed as a junior lecturer at Stellenbosch University and who is actively participating in the WBP.

Future development: Phenotyping Platform

To harness the power of breeding, efficient selection is key. When coupled with genotyping or genomic screening, genes underlying traits of interest can be identified and information used to inform breeding.

Konsortiums en navorsings-netwerk gevestig en verkry momentum

KONSORTIUMS EN MULTIBELANGHEBBER-VENNOOTSKAPPE

Gewasverbetering, gewasbeskerming, biosekuriteit, klimaataangepasbaarheid en bewaringslandbou is die vernaamste navorsings-prioriteit-fokusareas vir Graan SA. Die departement se primêre doelwit is om navorsingskonsortiums te vestig wat innovering gebruik om die produktiwiteit, winsgewendheid en volhoubaarheid van Suid-Afrikaanse graan- en oliesaadprodusente te verbeter en die bedryf en Suid-Afrika tot voordeel te strek. Terugvoer oor en die vordering van die konsortiums word hieronder verskaf.

Gewasverbetering: Koringteling

Die oppervlakte in Suid-Afrika wat met koring beplant is, het die afgelope 30 jaar as gevolg van geweldige druk op winsgewendheid kommerwekkend gekrimp. Die Departement van Wetenskap en Innovasie (DWI) en Graan SA het hulle dus daartoe verbind om 'n platform te ontwikkel om beter koringopbrengste in Suid-Afrika te verseker.

Die Koringtelingsplatform (KTP) is in 2014 as 'n konsortium met openbare sowel as privaat vennote gestig. Die platform poog om uiteindelik koringproduksie te verhoog deur kiemplasma met geteikende opbrengsverbetering as gevolg van droogte- en hitteverdraagsaamheid te ontwikkel. Kiemplasma met geteikende verbeterings word ontwikkel deur 'n voortelingsbenadering te volg, en word dan aan koringtelers verskaf om by telingsprogramme en die ontwikkeling van nuwe kultivars in te sluit.

STRATEGIESE VENNOOTSKAP TUSSEN DIE OPENBARE EN PRIVAAT SEKTOR

Die KTP is 'n gesamentlike inisiatief tussen die regering en die bedryf en is deel van die DWI se pogings om die Suid-Afrikaanse Bio-ekonomiestrategie te implementeer. Die platform word die afgelope vyf jaar deur die bedryf uit die Wintergraantrust (WGT) medebefonds. Ander vennote sluit die Landbounavorsingsraad (LNR), Sensako, Pannar en die Universiteit Stellenbosch in.

BYDRAE TOT LANDBOU

Tot op hede is 'n geraamde 300 lyne wat deur die KTP verskaf is deur die verskillende koringtelingsprogramme van die LNR, Sensako en Pannar opgeneem.

KONSORTIUMHOOGTEPUNTE VIR 2019

Menslikekapasiteitsbou

Die program huisves tans 'n postdoktorale genoot, 'n PhD-student, vyf MSc-studente en ses BSc Hons-/BSc Agric-studente. Drie gegradueerdes van die program het werk in die bedryf gekry, van wie een as junior lektor by die Universiteit Stellenbosch aangestel is en aktief aan die KTP deelneem.

Toekomstige ontwikkeling: Fenotiperingsplatform

Om die krag van teling in te span, is doeltreffende keuses noodsaaklik. Wanneer dit met genotiperings of genoomkeuring gekombineer word, kan gene se onderliggende belangrike eienskappe geïdentifiseer word.



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Currently, traditional phenotyping approaches are a bottle neck in identifying genes underlying traits of interest, and high-throughput methods are needed to keep up with the recent advances in screening and selection processes.

A high-throughput phenomics facility would harness multidisciplinary collaborations, be the first of its kind in South Africa and will attract research collaborations from around the world. In future, endeavours will be focused on establishing a high-throughput phenomics platform that will serve as a national research facility and will be available to private as well as public research partners to promote crop breeding in Southern Africa.

Crop protection

SOILBORNE PESTS AND DISEASES

The Crop Protection Consortium is focused on monitoring and preventing and/or managing the most prevalent and destructive pests and diseases in cereals and oilseed crops. As part of this consortium, soilborne pests and diseases are being surveyed and researched to provide producers with an understanding thereof, the importance of early detection and management options to protect grain yield.

SOUTH AFRICAN SCLEROTINIA RESEARCH NETWORK

The occurrence of Sclerotinia in South Africa is becoming more prominent as adequate control is lacking. Therefore, the South African Sclerotinia Research Network (SASRN) was established to provide a platform for dialogue to take place between researchers, industry and producers.

During September 2019, a workshop was held to identify strategic research priorities that will lead to outcomes-based research projects to the benefit of the industry. The meeting was attended by researchers and industry members involved with Sclerotinia related diseases in South Africa. The SASRN website (<http://sclerotinia.co.za/>) was launched and provides opportunities for knowledge sharing as well as for producers to submit questions and interact directly with researchers.

Current research is focused on modelling of the disease epidemiology and identifying potential sources of resistance. Results from these studies will contribute to effective management strategies for this pathogen.

en die inligting kan gebruik word om teling te bevorder. Tans kniehalter tradisionele fenotiperingsbenaderings die identifikasie van gene se onderliggende belangrike eienskappe, en hoëdeursetmetodes is nodig om met die jongste vorderings in die keurings- en seleksieprosesse by te hou.

'n Fasiliteit met 'n hoëdeursetfenomika sal multidissiplinêre samewerking inspan, die eerste van sy soort in Suid-Afrika wees, en navorsingsamewerking van regoor die wêreld lok. In die toekoms sal pogings daarop fokus om 'n hoëdeursetfenomika-platform te vestig wat as 'n nasionale navorsingsfasiliteit sal dien en vir privaat sowel as openbare navorsingsvennote beskikbaar sal wees om gewasteling in Suider-Afrika te bevorder.

Gewasbeskerming

GRONDGEDRAAGDE PLAIE EN SIEKTES

Die Gewasbeskermingskonsortium fokus op die monitering, voorkoming en/of bestuur van die algemeenste en vernietigendste siektes in graan- en oliesaadgewasse. As deel van hierdie konsortium word 'n opname van en navorsing oor grondgedraagde plaie en siektes gedoen om produsente te laat verstaan wat dit is, hoe belangrik vroeë opsporing is, en watter bestuursopsies beskikbaar is om die graanopbrengste te beskerm.

SUID-AFRIKAANSE SCLEROTINIA-NAVORSINGSNETWERK

Die voorkoms van Sclerotinia in Suid-Afrika word al hoe groter omdat daar nie voldoende beheer is nie. Die Suid-Afrikaanse Sclerotinia-navorsingsnetwerk (SASRN) is gevolglik geskep om 'n platform vir dialoog tussen navorsers, die bedryf en produsente te verskaf.

In September 2019 is 'n werkswinkel aangebied om strategiese navorsingsprioriteite te help identifiseer wat tot uitkomsgebaseerde navorsingsprojekte tot voordeel van die bedryf sal lei. Die werkswinkel is bygewoon deur navorsers en lede van die bedryf wat by Sclerotinia- verwante siektes in Suid-Afrika betrokke is. Die SASRN-webwerf (<http://sclerotinia.co.za/>) is bekend gestel en verskaf geleenthede om kennis te deel en ook vir produsente om vrae te stel en direk met navorsers te skakel.

Huidige navorsing fokus op die modellering van die siekte se epidemiologie en die identifisering van potensiële bronne van weerstand. Resultate van hierdie studies sal tot doeltreffende bestuurstrategieë vir hierdie patogene bydra.

CROP PROTECTION CONSORTIUM FOR SUMMER GRAINS

Summer grains play an essential role in both food security and in the economy of South Africa. Optimal production of these crops is hampered by weeds, pests and diseases. The outcome of Research and Development (R&D) in agriculture can support significant gains in productivity, by revealing the best strategies for the management of these threats.

With this in mind, the Crop Protection Consortium (CPC) aims to bring researchers and role-players together to solve industry-related crop protection problems experienced by summer grain producers. Moreover, the consortium aims to promote partnerships between government, industry, academia, private companies and other stakeholders to foster collaboration towards the unified goal of maintaining successful grain production and supporting a sustainable future for these crops.

A Crop Protection Workshop was held on 4 April in Pretoria and was attended by representatives from industry, government and public/private research institutions. The aim of the workshop was to discuss the organisational structures that need to be implemented in order to facilitate relevant, outcomes-based and producer-focused research projects to address the crop protection needs of the summer grain production region.

As a first step, a Grain Research Programme was established at the University of Pretoria to deliver support to producers, develop human capacity to support the summer grain industry and to conduct relevant research projects. The Grain Research Programme is in the process of compiling a Crop Protection Compendium which will support future research endeavours.

CONTRIBUTION TO AGRICULTURE

The CPC allows government, industry and academia to jointly work towards assisting producers to decreased disease incidence, improve crop yields and ultimately increase food security for South Africa.

Biosecurity: Early-warning system for armyworm in South Africa

A surveillance programme, initiated by Grain SA, was successfully implemented to identify the occurrence and spread of fall armyworm (*Spodoptera frugiperda*) in South Africa. Regular meetings are held between industry and government to discuss the national status of this pest, surveillance, diagnostic capacity, damage assessment, pest management and control regulations.

Thus far, fall armyworm (FAW) has been detected at significantly higher incidences in Limpopo and underlines that this region needs urgent intervention. Furthermore, distribution maps of FAW has revealed possible routes of spread of this armyworm into FAW-free regions of South Africa. Regular scouting by producers is paramount to complement surveillance programmes for early detection of invasive pests and pathogens that threaten South Africa's biosecurity and protection of local crop production.

Interestingly, very high numbers of false armyworm (*Leucania loreyi*) were caught in 90% of the FAW traps. This surveillance data emphasises the importance of implementing management practices to reduce the high incidences of both fall- and false armyworm.

BENEFITS OF BIOSECURITY SURVEILLANCE TO SOUTH AFRICA

Ensuring that adequate biosecurity measures are implemented for protection of South African crops is a priority government and industry are committed to in order to ensure national food security. Establishing a successful early-warning system for FAW enabled government and industry to rapidly respond through informing producers of appropriate control strategies and registering agrochemical control products. The current programme serves as an excellent baseline for preventing current biosecurity threats. It is critical for government and industry to identify and manage invasive pest and pathogen entry into South Africa, as crop losses threatens national food security.

GEWASBESKERMINGKONSORTIUM VIR SOMERGRANE

Somergraan speel 'n noodsaaklike rol in voedselsekerheid sowel as in die ekonomie van Suid-Afrika. Optimale produksie van hierdie gewasse word deur onkruid, plae en siektes gekniehalter. Die uitkoms van Navorsing en Ontwikkeling (N&O) in landbou kan tot beduidende groei in produktiwiteit lei deur die beste strategieë vir die bestuur van hierdie bedreigings na vore te bring.

Met hierdie feit in gedagte het die Gewasbeskermingskonsortium (GBK) ten doel om navorsers en rolspelers byeen te bring om bedryfsverwante gewasbeskermingsprobleme op te los wat somergraanprodusente ervaar. Die konsortium poog verder om vennootskappe tussen die regering, die bedryf, die akademie, privaat maatskappye en ander belanghebbendes te bevorder ten einde samewerking te verhoog ten opsigte van die verenigde doelwit om suksesvolle graanproduksie te handhaaf en 'n volhoubare toekoms vir hierdie gewasse te ondersteun.

'n Gewasbeskermingswerkwinkel is op 4 April in Pretoria gehou en is deur verteenwoordigers uit die bedryf, die regering en openbare/privaat navorsingsinstellings bygewoon. Die doel van hierdie werkwinkel was om die organisasiestrukture te bespreek wat geïmplementeer moet word om relevante, uitkomsgebaseerde en produsent-gefokusde navorsingsprojekte te fasiliteer ten einde die gewasbeskermingsbehoefte van die somergraanproduksiestreek te hanteer.

As 'n eerste stap is 'n Graannavorsingsprogram aan die Universiteit van Pretoria gevestig om steun aan produsente te verskaf, menslike kapasiteit te ontwikkel om die somergraanbedryf te ondersteun, en om relevante navorsingsprojekte uit te voer. Die Graannavorsingsprogram is besig om 'n Gewasbeskermingskompodium saam te stel wat toekomstige navorsingspogings sal ondersteun.

BYDRAE TOT LANDBOU

Die GBK laat die regering, die bedryf en die akademie toe om saam te werk om produsente te help om die voorkoms van siektes te verminder, gewasopbrengste te verbeter en uiteindelik voedselsekerheid vir Suid-Afrika te verhoog.

Biosekuriteit: Vroeëwaarskuwingstelsel vir kommandowurms in Suid-Afrika

'n Monitoringsprogram wat deur Graan SA geïnisieer is, is suksesvol geïmplementeer om die voorkoms en verspreiding van die herfskommandowurm (*Spodoptera frugiperda*) in Suid-Afrika te identifiseer. Gereelde vergaderings tussen die bedryf en die regering het die nasionale status van hierdie plaag, monitering, diagnostiese kapasiteit, skadebeoordeling, plaagbeheer en beheerregulasies aangespreek.

Tot dusver is 'n beduidend groter voorkoms van die herfskommandowurm in Limpopo waargeneem, wat beklemtoon dat hierdie streek dringende intervensie benodig. Verspreidingskaarte van die herfskommandowurm het moontlike verspreidingsroetes daarvan na kommandowurmvystreke in Suid-Afrika getoon. Gereelde inspeksies deur produsente is noodsaaklik om monitoringsprogramme aan te vul vir die vroeë opsporing van indringerplae en patogene wat Suid-Afrika se biosekuriteit bedreig en om plaaslike gewasproduksie te beskerm.

Dit is interessant dat 'n baie groot getal valskommandowurms (*Leucania loreyi*) in 90% van die valstrikke vir herfskommandowurms gevang is. Hierdie monitoringsdata beklemtoon hoe belangrik dit is om bestuurspraktyke te implementeer om die groot voorkoms van herfs- en valskommandowurms te verminder.

VOORDELE VAN BIOSEKURITEITSMONITERING VIR SUID-AFRIKA

Die regering en bedryf is verbind tot die versekering dat voldoende biosekuriteitsmaatreëls geïmplementeer word om Suid-Afrikaanse gewasse te beskerm sodat nasionale voedselsekerheid verseker kan word. Die daarstelling van 'n suksesvolle vroeëwaarskuwingstelsel vir die herfskommandowurm het die regering en die bedryf in staat gestel om vinnig te reageer deur produsente oor toepaslike beheerstrategieë in te lig en landbouchemiese beheerprodukte te registreer. Die huidige program dien as 'n uitstekende basislyn om huidige biosekuriteitsbedreigings te voorkom. Dit is van die uiterste belang dat die regering

Climate resilience

Predictions of how climatic conditions will change in the coming years is becoming increasingly available; however, these predictions will be meaningless if strategies to adapt to these conditions are not in place. In order to ensure that producers will continue to be sustainable, specifically smallholder producers, the Climate Resilience Consortium (CRC) was founded. Researchers from Sensako, Rhodes University (RU) and Stellenbosch University (SU) are collaborating to breed climate resilient maize lines with increased nutritional value and improved disease resistance.

These lines will then be evaluated under predicted future conditions at the state-of-the-art elevated CO₂ facility at RU. The past year has seen some exciting strides forward in this consortium as wheat was also added (under the leadership of the University of Fort Hare) and is currently being evaluated at RU. Furthermore, studies concerning the short to medium term effects of climate change and adaptations are also being conducted by researchers from the University of Cape Town.

EXPANDING MAIZE GENETIC VARIABILITY FOR HEAT AND DROUGHT

New maize germplasm using material from the ARC and CIMMYT is currently being used to increase heat and drought tolerance of South African cultivars. The size of the breeding programme is being increased to enable higher selection intensity, ensure adequate genetic variation, increase accuracy of selection, accelerate breeding cycles and improve decision support tools. The emphasis of this breeding programme is to deliver material which will be useful to smallholder producers, although the material will be available to all producers in Southern Africa.

MAIZE AND WHEAT DROUGHT RESPONSE UNDER FUTURE CLIMATIC CONDITIONS

The elevated CO₂ facility at RU enables testing of crops under future climatic conditions – i.e. increased CO₂ and increased temperatures. Thus far it seems that elevated CO₂ increases maize drought tolerance, however, this comes at a cost to yield and nutritional value. Wheat genotypes are currently being evaluated. In future, climate resilient lines bred thus far will be tested at this facility to ensure crops can withstand predicted climatic conditions.

CLIMATE RISK

Climate risk is defined as the risk resulting from climate change and affecting natural and human systems and regions. Producers can manage these risks by making informed decisions regarding crop choice, planting date, fertiliser application and disease management strategies. However, to manage climate risks require a sound understanding of a producer's specific farming practices and the region's climatic conditions. In order to produce useful information regarding climate risks and how to manage them, stakeholder interaction is essential. A project is currently being conducted to assess climate risks for important (and overlooked) maize production regions in South Africa.

MAIZE PLANTING WINDOW

Rainfall patterns is expected to be significantly impacted by climate change and is predicted to lead to decreases in the number of rainy days and increased duration of dry spells. This phenomenon was widely observed in South Africa during the 2018/2019 season, as lack of rainfall during optimal planting windows led to delayed planting dates; to the point where much of the planting took place beyond normal planting windows. The Grain SA Research and Policy Centre team launched a project to investigate the impact of late planting of maize cultivars, specifically addressing yield, quality and physiological responses.

en die bedryf indringerplae en patogene se binnekoms in Suid-Afrika moet identifiseer en bestuur, aangesien gewasverliese nasionale voedselsekuriteit bedreig.

Klimaatsaanpasbaarheid

Daar word toenemend voorspellings gemaak oor hoe klimaats-toestande in die komende jare sal verander, maar hierdie voorspellings sal betekenisloos wees as strategieë om by hierdie toestande aan te pas, nie in plek is nie. Ten einde te verseker dat produsente – veral kleinskaalse produsente – sal voortgaan om volhoubaar te wees, is die Klimaatsaanpasbaarheidskonsortium (CRC) gestig. Navorsers van Sensako, Rhodes Universiteit (RU) en Universiteit Stellenbosch (US) werk saam om klimaatsaanpasbare mielielyne met meer voedingswaarde en beter siekteweerstandigheid te teel.

Hierdie lyne word dan by die ultramoderne verhoogde-CO₂-fasiliteit by die RU aan die hand van voorspelde toekomstige toestande geëvalueer. Gedurende die afgelope jaar is daar 'n paar opwindende treë vorentoe gegee toe koring ook bygevoeg is (onder leierskap van die Universiteit van Fort Hare). Dit word tans by die RU geëvalueer. Studies oor die kort- tot mediumtermynuitwerking van klimaatsverandering en aanpassings word ook deur navorsers by die Universiteit van Kaapstad gedoen.

UITBREIDING VAN MIELIES SE GENETIESE VERANDERLIKHEID VIR HITTE EN DROOGTE

Nuwe mieliekiemplasma met materiaal van die LNR en CIMMYT word tans gebruik om die hitte- en droogteverdraagsaamheid van Suid-Afrikaanse kultivars te verhoog. Die grootte van die telingsprogram word uitgebrei om groter keuringsintensiteit moontlik te maak, te verseker dat daar voldoende genetiese verandering is, die akkuraatheid van seleksie te verhoog, en instrumente vir die ondersteuning van besluitneming te verbeter. Die klem van hierdie telingsprogram is om materiaal te verskaf wat vir kleinskaalse produsente nuttig sal wees, hoewel die materiaal tot alle produsente in Suider-Afrika se beskikking sal wees.

MIELIES EN KORING SE REAKSIE OP DROOGTE ONDER TOEKOMSTIGE KLIMAATSTOESTANDE

Die verhoogde-CO₂-fasiliteit by die RU maak dit moontlik om gewasse onder toekomstige klimaatstoestande, met ander woorde verhoogde CO₂ en hoër temperature, te toets. Tot dusver lyk dit asof verhoogde CO₂ mielies se droogteverdraagsaamheid verhoog, maar dit verlaag die opbrengs en voedingswaarde. Koringgenotipes word tans geëvalueer. Klimaatsaanpasbare lyne wat tot dusver geteel is, sal in die toekoms by hierdie fasiliteit getoets word om seker te maak dat gewasse voorspelde klimaatstoestande kan weerstaan.

KLIMAATSRISIKO

Klimaatsrisiko word omskryf as die risiko voortspruitend uit klimaatsverandering en wat natuurlike en menslike stelsels en streke aantast. Produsente kan hierdie risiko's bestuur deur ingeligte besluite oor gewaskeuse, plantdatums, bemestingsbehandeling en siektebestuurstrategieë te neem. Die bestuur van klimaatsrisiko's verg egter 'n deeglike begrip van 'n produsent se spesifieke boerderypraktyke en die streek se klimaatstoestande. Ten einde nuttige inligting te produseer oor klimaatsrisiko's en hoe om dit te bestuur, is belanghebbendeinteraksie noodsaaklik. 'n Projek is tans aan die gang om klimaatsrisiko's vir belangrike (en miskende) mielieproduksiegebiede van Suid-Afrika te evalueer.

VENSTER VIR MIELIE-AANPLANTINGS

Reënvalpatrone sal na verwagting beduidend deur klimaatsverandering geraak word, en daar word voorspel dat dit tot 'n afname in die getal reëndae en langer droë tye sal lei. Hierdie verskynsel is in die 2018/2019-seisoen algemeen in Suid-Afrika waargeneem, aangesien die gebrek aan reën tydens optimale plantvensters plantdatums vertraag het – tot op die punt waar heelwat van die aanplantings buite die normale plantvensters plaasgevind het. Die Graannavorsing- en Beleidsentrumspan is tans besig om 'n projek te loods om die impak van laat aanplanting van mieliekultivars te ondersoek – veral ten opsigte van opbrengs, gehalte en fisiologiese reaksies.

CONTRIBUTION TO AGRICULTURE

The CRC is investigating the current resilience of maize and wheat to expected future climatic impacts and is actively working toward decreasing the effects of these impacts using breeding approaches. In addition, the consortium aims to provide region-specific information on expected climate change impacts.

CONSERVATION AGRICULTURE

Grain SA, financially supported by the Maize Trust and the Winter Cereal Trust, established a Conservation Agriculture Farmer Innovation Programme (CA FIP) to address concerns about excessively high soil degradation rates, profitability and poverty in grain producing regions.

Progress and major achievements

- ▶ Feedback and observations during CA FIP outreach and awareness activities in 2019 showed that an enormous interest has been developed among grain producers and other key stakeholders during the last six years. It has been the innovators and early adopters (i.e. producers, active researchers and journalists) who are leading this process. The CA FIP has been one of the key initiatives supporting this process, prominently positioned to facilitate the interaction between producers and other key stakeholders.
 - ▶ The CA FIP at Grain SA has successfully designed, implemented and managed various CA initiatives and projects, mostly funded by the Maize Trust and to a lesser extent by the Winter Cereal Trust. The CA FIP has completed its sixth year (season) and significant momentum has already been built into the current season.
 - ▶ One of the prime sources of CA information that has continued successfully, is the amount of CA related articles published, especially in the *SA Graan/Grain* magazine. Other popular magazines (e.g. *Landbouweekblad*, *Farmers Weekly* and *Stock Farm*) have been very supportive to accelerate this process. All the articles in *SA Graan/Grain* can be accessed through the Grain SA website.
 - ▶ Various awareness events were held or supported, such as annual conferences and farmers' days. These events are seen as opportunities to share best local and international practices on how CA principles have been adapted in specific contexts. A number of successful awareness events were held in this period, especially the Vrede Farmers Day at Ascent silos, as well as the Ottosdal and Reitz conferences, the latter two jointly done with Ottosdal No-till Club, Riemland Study Group, *Landbouweekblad* and VKB.
 - ▶ The development of a series of CA videos (*Shepherds of the soil*) highlighting successful CA producers and important principles, was launched in November 2016. Four new videos were finalised in 2019 and all these videos are available on the Grain SA website.
 - ▶ The implementation of on-farm CA research and development projects among commercial and smallholder farmers are seen as key interventions in the adaptation of CA in different contexts in South Africa. At the moment a number of projects are implemented at various study areas, which follow a systems approach, involving farmers as key actors in the innovation process, using on-farm trials as one of the tools to research and adapt. With commercial farmers, key projects are implemented in the North West Province (with the Ottosdal No-till Club), in the north-eastern Free State at Vrede (with the Ascent Study Group) and at Reitz (with the Riemland Study Group).
- With smallholders, CA projects have been implemented at three study areas, namely Bergville (KwaZulu-Natal), KwaZulu-Natal Midlands and southern KwaZulu-Natal as well as in Matatiele (Eastern Cape). At this stage these projects have shown remarkable success, progress and impact with significant milestones being achieved.
- ▶ Amidst the various serious environmental threats and dire economic situation of many grain producers, a greater urgency has emerged to adapt CA in various local situations much faster.

BYDRAE TOT LANDBOU

Die CRC ondersoek die huidige aanpasbaarheid van mielies en koring ten opsigte van verwagte toekomstige klimaatsimpak, en werk aktief daaraan om die uitwerking van hierdie impak met behulp van telingsbenaderings te verminder. Die konsortium beoog ook om streekspesifieke inligting oor verwagte klimaatsveranderingimpak te verskaf.

BEWARINGS-LANDBOU

Graan SA, met die finansiële ondersteuning van die Mielietrust en Wintergraantrust, het 'n Boere-innoveringsprogram vir Bewaringslandbou (BIP-BL) begin om bekommernisse oor buitensporig hoë gronddegradasiekoerse, winsgewendheid en armoede in graanproduserende gebiede te ondersoek.

Vordering en belangrikste prestasies

- ▶ Terugvoer en waarnemings tydens BIP-BL-uitreik- en bewusmakingsaktiwiteite in 2019 het getoon dat daar die afgelope ses jaar geweldige belangstelling onder graanprodusente en ander belanghebbendes ontwikkel het. Die innoveerders en vroeë gebruikers (met ander woorde produsente, aktiewe navorsers en joernaliste) is aan die voorpunt van die proses. Die BIP-BL is een van die sleutelinisiatiewe wat hierdie proses ondersteun, en is prominent geposisioneer om die interaksie tussen produsente en ander sleutelbelanghebbendes te fasiliteer.
 - ▶ Die BIP-BL by Graan SA het verskeie inisiatiewe en projekte vir BL met sukses ontwerp, geïmplementeer en bestuur. Die projekte word grotendeels deur die Mielietrust, en in 'n mindere mate deur die Wintergraantrust, befonds. Die BIP-BL het sy sesde jaar (seisoen) agter die rug en beduidende momentum is reeds in die huidige seisoen opgebou.
 - ▶ Een van die groot bronne van BL-inligting wat suksesvol benut word, is die BL-verwante artikels wat gepubliseer word, veral in die *SA Graan/Grain*-tydskrif. Ander gewilde tydskrifte (byvoorbeeld *Landbouweekblad*, *Farmers Weekly* en *Veeplaas*) is baie ondersteunend om hierdie proses te versnel. Toegang tot al die artikels in *SA Graan/Grain* kan deur die Graan SA-webwerf verkry word.
 - ▶ Verskeie bewusmakingsgeleenthede, byvoorbeeld jaarlikse konferensies en boeredae, is gehou of ondersteun. Hierdie gebeure word beskou as geleenthede om die beste plaaslike en internasionale praktyke te deel oor hoe BL-beginsels in spesifieke kontekste aangepas is. 'n Aantal suksesvolle bewusmakingsgeleenthede is in hierdie tydperk gehou, byvoorbeeld die Vrede-produsentedag by Ascent-silo's, en ook die Ottosdal- en Reitz-konferensies. Laasgenoemde is in samewerking met die Ottosdal Geenbewerkingklub, die Riemland-studiegroep, *Landbouweekblad* en VKB aangebied.
 - ▶ Die ontwikkeling van 'n reeks BL-video's (*Shepherds of the soil*) wat suksesvolle BL-produsente en belangrike beginsels beklemtoon, is in November 2016 bekend gestel. Vier nuwe video's is in 2019 gemaak, en al die video's is op die Graan SA-webwerf beskikbaar.
 - ▶ Die implementering van BL-navorsing op plase en ontwikkelingsprojekte onder kommersiële en kleinskaalse boere word as belangrike intervensies in die aanpassing van BL by verskillende kontekste in Suid-Afrika beskou. 'n Aantal projekte word tans in verskillende studiegebiede geïmplementeer en volg 'n stelselbenadering, wat boere as belangrike deelnemers aan die innoveringsproses betrek en proewe op plase as een van die instrumente vir navorsing en aanpassing gebruik. Met kommersiële produsente word sleutelprojekte in Noordwes (saam met die Ottosdal Geenbewerkingklub), in die noordoos-Vrystaat (saam met die Ascent-studiegroep) en by Reitz (saam met die Riemland-studiegroep) geïmplementeer.
- Met kleinskaalse boere is BL-projekte in al drie studiegebiede, naamlik Bergville (KwaZulu-Natal), die KwaZulu-Natal Middellande en suidelike KwaZulu-Natal, asook in Matatiele (Oos-Kaap) geïmplementeer. Op hierdie stadium toon hierdie projekte merkwaardige sukses, vordering en impak, en belangrike mylpale is bereik.
- ▶ Te midde van verskillende ernstige omgewingsbedreigings en die swak ekonomiese situasie van talle graanprodusente is 'n groter dringendheid geïdentifiseer om BL baie vinniger by verskillende plaaslike situasies aan te pas.

Programme is a reliable deliverer of developmental support

OVERVIEW

‘What you do makes a difference. You have to decide what kind of difference you want to make.’

JANE GOODALL

Multiple pressures of political reform, climate variability, population growth, food accessibility, economic pressures and environment sustainability make prioritising agricultural development in South Africa necessary. Grain SA's performance over 20 years has shown we deliver effective support to developing farmers.

Minister of Agriculture, Land Reform and Rural Development, Thoko Didiza, has affirmed that investment in agriculture must play a role in diversification of our economy and in contributing towards economic growth. Quoting 2017 World Food Prize laureate, Dr Akinwumi Adesina, she said in Africa economic diversification and lasting wealth creation begins with a vibrant agriculture sector.

Grain SA has been an accountable partner to its donors – and farmers have learned to trust our programme. They know we're ready to support them on their journey towards becoming better farmers.

Things that matter

- ▶ All people must be treated with dignity.
- ▶ We believe agriculture is a strategic 'mover' that unlocks potential and improves livelihoods.
- ▶ We believe we can improve livelihood potential and increase household food security.
- ▶ We assist farmers who have access to land and the opportunity to farm.
- ▶ We actively participate in the transformation of the sector.
- ▶ We provide constructive guidance and teach best practices.

Things we do

- ▶ We care.
- ▶ We transfer knowledge.
- ▶ We facilitate inclusion of developing farmers.
- ▶ We are driven by passion and work with dedication.
- ▶ We travel on remote country tracks to meet farmers where they live and work.
- ▶ We learn about each unique environment, identify strengths, opportunities, weaknesses and challenges and find ways to uplift and empower farmers.
- ▶ We implement projects aimed at equipping farmers with knowledge and skills.
- ▶ We assist farmers to mitigate risks and grow their enterprises.
- ▶ While we cannot address all sectoral needs, we do make a difference.

Program lewer betroubare ontwikkelingsteun

OORSIG

“What you do makes a difference. You have to decide what kind of difference you want to make.”

JANE GOODALL

Die druk van politieke hervorming, klimaatveranderlikheid, bevolkingsgroei, voedseltoeganklikheid, ekonomiese druk en omgewingsvolhoubaarheid maak dit noodsaaklik om landbou-ontwikkeling in Suid-Afrika as prioriteit te stel. Graan SA se prestasie oor 20 jaar het getoon dat ons doeltreffende steun aan ontwikkelende boere verskaf.

Die Minister van Landbou, Grondhervorming en Landelike Ontwikkeling, Thoko Didiza, het bevestig dat belegging in landbou 'n rol in die diversifisering van ons ekonomie moet speel, en in die bydrae tot ekonomiese groei. Sy het dr Akinwumi Adesina, die wenner van die Wêreldvoedselprys in 2017, aangehaal en gesê dat ekonomiese diversifisering en blywende welvaartskepping in Afrika met 'n lewendige landbousektor begin.

Graan SA is 'n betroubare vennoot vir sy donateurs – en boere het geleer om ons program te vertrou. Hulle weet ons is oorgehaal om hulle te ondersteun op hulle reis om beter boere te word.

Aspekte wat tel

- ▶ Alle mense moet met waardigheid behandel word.
- ▶ Ons glo dat landbou 'n strategiese dryfkrag is wat potensiaal ontsluit en mense se bestaan verbeter.
- ▶ Ons glo ons kan die potensiaal van mense se bestaan verbeter en huishoudelike voedselsekerheid vergroot.
- ▶ Ons help boere wat toegang tot grond het en die geleentheid het om te boer.
- ▶ Ons neem aktief aan die transformasie van die sektor deel.
- ▶ Ons verskaf konstruktiewe leiding en onderrig in die beste praktyke.

Wat ons doen

- ▶ Ons gee om.
- ▶ Ons dra kennis oor.
- ▶ Ons fasiliteer die insluiting van ontwikkelende boere.
- ▶ Ons word deur passie gedryf en werk toegewyd.
- ▶ Ons reis na afgeleë landelike gebiede om boere te bedien waar hulle woon en werk.
- ▶ Ons leer oor elke unieke omgewing, identifiseer sterk punte, geleenthede, swakhede en uitdagings en vind maniere om boere op te hef en te bemagtig.
- ▶ Ons implementeer projekte wat daarop gemik is om boere met kennis en vaardighede toe te rus.
- ▶ Ons ondersteun boere om risiko's te verminder en hulle ondernemings te laat groei.
- ▶ Hoewel ons nie alle sektorale behoeftes kan aanspreek nie, maak ons wel 'n verskil.



Frikkie du Toit
FINANCIAL/OFFICE ADMINISTRATOR
FINANSIËLE/KANTOORADMINISTRATEUR



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DEVELOPMENT CO-ORDINATOR: DUNDEE
ONTWIKKELINGSKOÖRDINEERDER:
DUNDEE



Du Toit van der Westhuizen
DEVELOPMENT CO-ORDINATOR:
LICHTENBURG
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Smangaliso Zimbili
OFFICE ASSISTANT: MBOMBELA
KANTOORASSISTENT: MBOMBELA



Liana Stroebel
DEVELOPMENT CO-ORDINATOR: PAARL
ONTWIKKELINGSKOÖRDINEERDER:
PAARL

About development

All development is about change – and it is not always a comfortable or easy process.

- ▶ Development is the introduction of new ideas into a social system to produce higher per capita incomes through modern production methods.
- ▶ Development is building up people so they can build a better future.
- ▶ Development is about respecting people and what they do.
- ▶ Development starts with individual potential and desires and proceeds to enhancement and growth (FAO).

Felt needs are those identified by the community, while unfelt needs are identified by development officers and are still unknown to the community. Farmer development includes meeting farmers' felt needs while attention is also paid to unfelt needs known to be of benefit to farmers.

We don't farm for people – we teach them how to farm

The best strategy for sustainable development is development of individual capacities. We advocate that:

- ▶ Farmers must farm for themselves.
- ▶ Farmers should own their own equipment.
- ▶ All scales of farmers can be assisted to use land available to them; with modern crop production methods.
- ▶ Success is sustainable, optimal production on every hectare (not total hectares planted, nor total tons harvested).

We believe in participatory development

Farmers can adapt indigenous knowledge and practices in a changing world. Comprehensive and diverse non-formal education and continued education processes are key to improved production practices and profitable farming.

- ▶ We focus on learning more about farmers, their challenges and needs.
- ▶ We prioritise building trust relationships in order to teach new concepts.
- ▶ We depend on collaborative partnerships.
- ▶ We build supportive networks around developing farmers.

Donor funding with our team's expertise contribute to:

- ▶ Farmer education and skills development.
- ▶ Identification of best practices and modern technology for development.
- ▶ Optimisation of production on land available.
- ▶ Increased food security.
- ▶ Other support to farmers like The Jobs Fund project, recapitalisation programmes and Department of Science and Innovation (DSI) and the Department of Rural Development and Land Reform initiatives.

Rakende ontwikkeling

Alle ontwikkeling gaan oor verandering – en dit is nie altyd 'n gerieflike of maklike proses nie.

- ▶ Ontwikkeling is die bekendstelling van nuwe idees in 'n sosiale stelsel om groter per capita-inkomste deur moderne produksiemetodes te lewer.
- ▶ Ontwikkeling is die oprigting van mense sodat hulle 'n beter toekoms kan bou.
- ▶ Ontwikkeling gaan daaroor om mense en wat hulle doen, te respekteer.
- ▶ Ontwikkeling begin met individuele potensiaal en begeertes en vorder na verbetering en groei (VLO).

Beleefde behoeftes is dié wat deur die gemeenskap geïdentifiseer word, terwyl niebeleefde behoeftes deur landbouvoorligters geïdentifiseer word en steeds onbekend is aan die gemeenskap. Landbou-ontwikkeling sluit in die bevrediging van boere se beleefde behoeftes, terwyl aandag ook geskenk word aan niebeleefde behoeftes wat wel tot boere se voordeel is.

Ons boer nie vir mense nie – ons leer hulle hoe om te boer

Die beste strategie vir volhoubare ontwikkeling is die ontwikkeling van individuele vermoëns. Ons beveel aan dat:

- ▶ Boere vir hulleself moet boer.
- ▶ Boere hulle eie toerusting moet besit.
- ▶ Boere op alle vlakke gehelp kan word om grond wat tot hulle beskikking is met moderne gewasproduksiemetodes te benut.
- ▶ Sukses as volhoubare, optimale produksie op elke hektaar beskou word (nie die totale hektaar aangeplant nie, en ook nie die totale ton geoes nie).

Ons glo in deelnemende ontwikkeling

Boere kan inheemse kennis en praktyke in 'n veranderende wêreld aanpas. Omvattende en uiteenlopende nieformele opvoeding en voortgesette opvoedingsprosesse is die sleutel tot beter produksiepraktyke en winsgewende boerdery.

- ▶ Ons fokus daarop om meer oor boere, hulle uitdagings en behoeftes te leer.
- ▶ Ons prioritiseer die bou van vertrouensverhoudings ten einde nuwe konsepte te onderrig.
- ▶ Ons maak op samewerkende vennootskappe staat.
- ▶ Ons bou ondersteunende netwerke om ontwikkelende boere.

Skenkerbefondsing saam met ons span se kundigheid dra by tot:

- ▶ Boere se opvoeding en vaardigheidsontwikkeling.
- ▶ Identifikasie van beste praktyke en moderne tegnologie vir ontwikkeling.
- ▶ Optimalisering van produksie op beskikbare grond.
- ▶ Verhoogde voedselsekerheid.
- ▶ Ander steun aan boere soos The Jobs Fund-projek, herkapitaliseringsprogramme en inisiatiewe van die Departement van Wetenskap en Innowering (DWI) en die Departement van Landelike Ontwikkeling en Grondhervorming.

Developing farmers face many challenges

In South Africa many factors inhibit farming success:

- ▶ Poor infrastructure.
- ▶ Poor road networks.
- ▶ Lack of transportation and storage.
- ▶ Lack of marketing skills.
- ▶ Shortage of vehicles, implements and tools.
- ▶ Farm management skills.
- ▶ Insufficient knowledge.

Whilst government and other sectoral stakeholders should address many of these issues, the Grain SA Farmer Development Programme aims to:

- ▶ Equip farmers with new and relevant knowledge;
- ▶ Offer appropriate training and skills development programmes; and
- ▶ Provide reliable, trustworthy mentorship.

One size does not fit all – every farmer is unique

Just as every farmer is unique, every farming enterprise is unique too. For effective development unique characteristics need to be addressed. During 2019 we had:

New Era Commercial ⇒ 250 tons plus	81
Potential Commercial farmers ⇒ > 100 ha	208
Smallholder farmers ⇒ 10,5 ha - 100 ha	375
Subsistence farmers ⇒ 0,5 ha - 10 ha	11 408
Total number of farmer members	12 072

We are structured to support and service our farmers

The framework of the Farmer Development Programme makes it possible to implement a wide range of projects with our team committed to networking at grass root levels. The yellow pins highlight the locations of our Head Office and Regional Farmer Development offices.

The Farmer Development head office managed by the programme manager Jane McPherson and assisted by operations manager, Dr Willie Kotze, is in Bloemfontein. Administrative support is provided by Madeleen Steyn and Sam Ruiters.

Ontwikkelende boere het baie uitdagings

In Suid-Afrika beperk talle faktore boerderysukses:

- ▶ Swak infrastruktuur.
- ▶ Swak padnetwerke.
- ▶ Gebrek aan vervoer en opbergingsplek.
- ▶ Gebrek aan bemarkingsvaardighede.
- ▶ Tekort aan voertuie, implemente en gereedskap.
- ▶ Plaasbestuursvaardighede.
- ▶ Onvoldoende kennis.

Terwyl staats- en ander sektorale belanghebbendes talle van hierdie kwessies behoort te hanteer, het die Graan SA Landbou-ontwikkelingsprogram ten doel om:

- ▶ Boere met nuwe en tersaaklike kennis toe te rus;
- ▶ Toepaslike opleidings- en vaardigheidsontwikkelingsprogramme aan te bied; en
- ▶ Betroubare mentorskap te verskaf.

Almal kan nie oor een kam geskeer word nie – elke boer is uniek

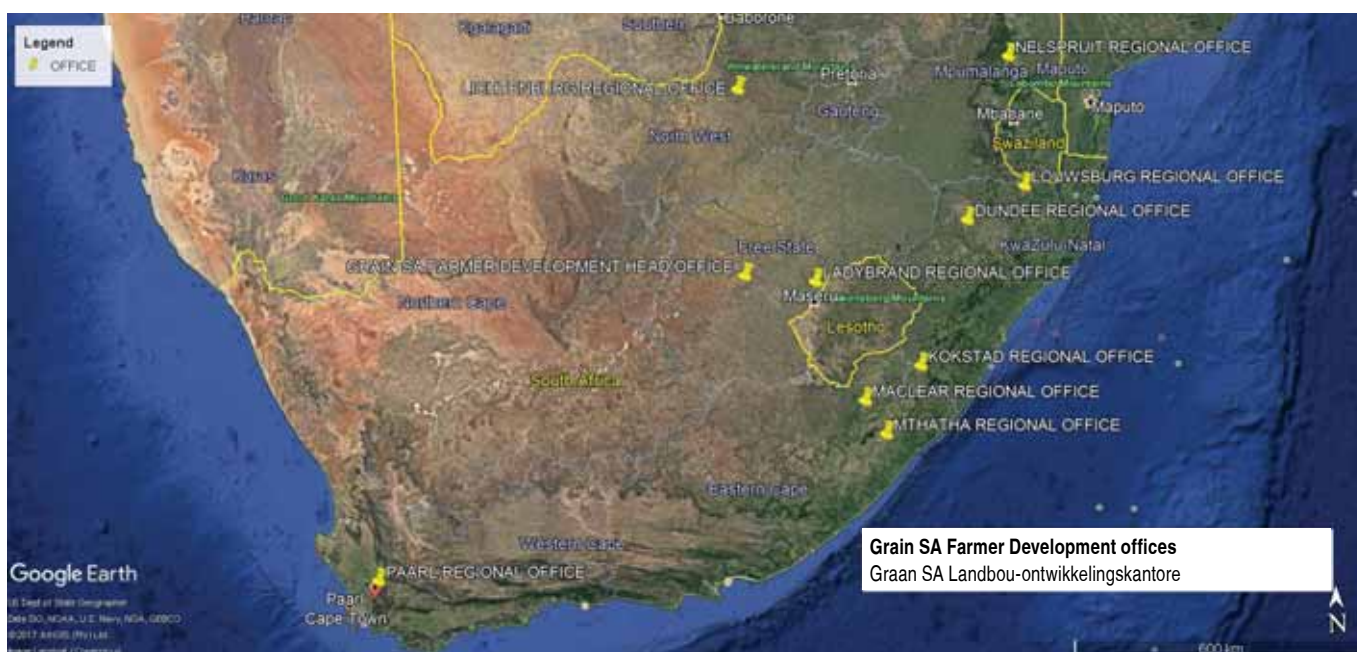
Net soos elke boer uniek is, is elke boerdery-onderneming ook uniek. Vir doeltreffende ontwikkeling moet eiensortige eienskappe aangespreek word. Gedurende 2019 het ons die volgende ledetal gehad:

Nuwe Era Kommersieel ⇒ 250 ton plus	81
Potensiële Kommersiële produsente ⇒ > 100 ha	208
Kleinskaalse boere ⇒ 10,5 ha - 100 ha	375
Bestaansboere ⇒ 0,5 ha - 10 ha	11 408
Totale getal boerelede	12 072

Ons is gestruktureer om ons boere te ondersteun en 'n diens aan hulle te lewer

Die raamwerk van die Landbou-ontwikkelingsprogram maak dit moontlik om 'n wye verskeidenheid projekte te implementeer, met ons span wat daartoe verbind is om op voetsoolvlak te netwerk. Die geel merkers dui die ligging van ons hoofkantoor en streekkantore vir landbou-ontwikkeling aan.

Die Landbou-ontwikkeling-hoofkantoor is in Bloemfontein geleë en word deur die programbestuurder, Jane McPherson, met die bystand van die bedryfsbestuurder, dr Willie Kotze, bestuur. Administratiewe steun word deur Madeleen Steyn en Sam Ruiters verskaf.



There are nine regional development offices situated in primary grain growing regions of South Africa.

Each office is unique in character. This may be due to the nature of agricultural activity in that region, location of the study group or the level of exposure farmers have had to modern farming methods. Some offices like Paarl, Ladybrand and Lichtenburg service fewer, larger farmers who would be more likely to fall into the Potential Commercial farmer and New Era farmer categories, while other regions such as Nelspruit, Louwsburg, Dundee, Mthatha, Maclear and Kokstad have more Subsistence and Smallholder farmers.

Daar is nege streeksontwikkelingskantore wat in primêre graanprodukerende streke van Suid-Afrika geleë is.

Elke kantoor het 'n unieke karakter. Dit kan die gevolg wees van die aard van die landbou-aktiwiteit in daardie streek, die ligging van die studiegroep, of die vlak van blootstelling wat boere aan moderne boerderymetodes het. Sekere kantore soos die Paarl, Ladybrand en Lichtenburg diens minder, groter boere wat eerder in die kategorie vir Potensiële Kommersiële boere en Nuwe Era boere val, terwyl ander streke soos Nelspruit, Louwsburg, Dundee, Mthatha, Maclear en Kokstad meer Bestaans- en Kleinskaalse boere bedien.

Regional development offices Streeksontwikkelingskantore

OFFICE KANTOOR	REGIONAL MANAGER STREEKSBESTUURDER	ASSISTANT ASSISTENT	DONOR PARTNERS DONATEURSVENNOTE
Dundee	Graeme Engelbrecht	Nathi Mazibuko	Maize Trust/Mielietrust, Afgri
Kokstad	Luke Collier	Luthando Diko	Maize Trust/Mielietrust, Bayer, Omnia
Ladybrand	Johan Kriel	Mariaan Harmse	Bayer
Lichtenburg	Du Toit van der Westhuizen	Lebo Mogatlanyane	Bayer, Afgri, Grain SA/Graan SA
Louwsburg	Jurie Mentz	Sydwell Nkosi	Bayer
Maclear	Sarel Pretorius	Lindie Pretorius	Maize Trust/Mielietrust, Pannar
Mthatha	Sinelizwi Fakade	Cwayita Mpotyi	Maize Trust/Mielietrust, Pioneer, Sasol Base Chemicals
Nelspruit	Jerry Mthombothi	Smangalisu Zimbili	Maize Trust/Mielietrust, Pannar, Sasol Base, Omnia
Paarl	Liana Stroebel	Hayley Ehrenreich	Winter Cereal Trust/Wintergraantrust

Farmer involvement Boere se betrokkenheid

FARMER CATEGORIES BOERDERYKATEGORIE	REGIONAL OFFICES STREEKSKANTORE								
	DUNDEE	KOKSTAD	LADYBRAND	LICHTENBURG	LOUWSBURG	MACLEAR	MTHATHA	NELSPRUIT	PAARL
Subsistence farmers/Bestaansboere	1 583	2 610	62	56	1 442	897	3 344	1 411	3
Smallholder farmers/Kleinskaalse boere	12	24	51	131	22	56	31	43	5
Potential Commercial farmers/Potensiële Kommersiële boere	4	8	81	87	10	4	0	0	14
New Era Commercial farmers/Nuwe Era Kommersiële boere	4	6	31	21	8	1	0	0	10
Number of study groups per region/Getal studiegroepe per streek	26	40	10	13	14	12	67	20	7
Study group members/Studiegroeplede	2 015	2 401	327	328	1 622	646	3 318	1 881	83

Land access for members of Grain SA Farmer Development Toegang tot grond vir lede van Graan SA Landbou-ontwikkeling

TYPE TIPE	OWNERSHIP EIENAARSKAP	USAGE GEBRUIK	HECTARES HEKTAAR
Arable/Bewerkbaar	Own/Besit	Used by farmer/Gebruik deur boer	21 290,70
Arable/Bewerkbaar	Municipal/Munisipale	Hired by farmer/Gehuur deur boer	7 130,21
Arable/Bewerkbaar	Leased/Gehuur	Private land/Privaat grond	11 407,90
Arable/Bewerkbaar	Land redistribution/Grondherverdeling	Used by farmer/Gebruik deur boer	36 732,24
Arable/Bewerkbaar	Communal land/Kommunale grond	Used by farmer/Gebruik deur boer	40 609,85
Grazing/Weiding	Leased/Gehuur	Private land/Privaat grond	10 742,89
Grazing/Weiding	Land redistribution/Grondherverdeling	Used by farmer/Gebruik deur boer	46 111,55
Grazing/Weiding	Own/Besit	Used by farmer/Gebruik deur boer	27 034,65

We aim to assist farmers to produce the highest yields possible from every hectare, regardless of the nature of their access to land or the size of their farming operations.

Ons doel is om boere te help om die hoogste opbrengste moontlik op elke hektaar te produseer, ongeag die aard van hulle toegang tot grond of die omvang van hulle boerderybedrywighede.

In the strategic communication toolbox

Communication for development is the key to successful development and is founded on community participation which acknowledges the individual and invites them to participate in the development journey.

Every activity undertaken is tailored with the intention of transferring knowledge and/or new sets of skills inter alia via:

- ▶ Support services to groups ⇒ study groups.
- ▶ Support to individual farmers ⇒ one-to-one mentorship.
- ▶ Knowledge transfer and skills development ⇒ training courses.
- ▶ Rapid knowledge transfer through mass media ⇒ *Pula Imvula* magazine.

1. Study group activity 1 – team members hold meetings with farmers.

In this period of reporting we held 5 382 study group meetings with developing farmers associated to our regional development offices.

- ▶ The study group sets the Grain SA footprint in key grain growing regions.
- ▶ It offers developing farmers entry level access to the programme.
- ▶ We get to know farmers; farmers learn to trust us.
- ▶ Identify unique challenges and opportunities in a region.
- ▶ Transfer of information – theory and practical.
- ▶ Team is instrumental in updating local farming systems.

2. Study group activity 2 – demonstration trials.

In this period of reporting 16 demonstration plots were planted by our regional development managers.

- ▶ 'Tell me and I forget. Teach me and I remember. Involve me and I learn.' – Benjamin Franklin.
- ▶ Team and farmers plan and plant trial plots.
- ▶ Farmers see the benefits of doing things differently.
- ▶ Farmers learn best from seeing with their own eyes in their own location – they change more willingly to more effective farming methods.

3. Study group activity 3 – hold farmers' days.

In this period of reporting we held 41 farmers days out of our regional development offices.

- ▶ Farmers' Days are organised to bring farmers to see the trial plots for themselves.
- ▶ Opportunity is also given for farmers to meet other stakeholders in the sector.
- ▶ Farmers learn from agricultural experts and industry representatives.
- ▶ The farming community gets the opportunity to voice concerns and discuss challenges.

4. Support services to individual farmers – activity 1: One-on-one mentoring.

Our team members paid 798 on-farm visits during this period of reporting.

- ▶ In any development programme there should be individuals whom demonstrate increasing independence and enterprise growth.
- ▶ The team support developing farmers who have progressed beyond the services offered by the study group.
- ▶ These farmers are almost ready to farm independently but still benefit from mentoring.

5. Support services to individual farmers – activity 2: On-farm visits.

- ▶ Individual farmer support includes mentoring visits to the farmer.
- ▶ Detailed planning, budget review, management etc. are discussed.
- ▶ The team conducts whole farm assessment and makes recommendations.
- ▶ Farm visits assist farmers with practical processes and the monitoring crops.

New Era Farmer of the Year Competition

26 high performing farmers from different categories participated in our 2019 Farmer of the Year competition.

- ▶ To identify role models to inspire other farmers.
- ▶ A moment to celebrate the learning, development and growth that has taken place.

In die strategiesekommunikasie-gereedskapkis

Kommunikasie vir ontwikkeling is die sleutel tot suksesvolle ontwikkeling en is gegrond op gemeenskapsdeelname wat erkenning aan die individu gee en hulle nooi om aan die ontwikkelingsreis deel te neem.

Elke aktiwiteit wat onderneem word, is ontwerp met die doel om kennis en/of nuwe vaardighede oor te dra, onder andere deur middel van:

- ▶ Steundienste aan groepe ⇒ studiegroepe.
- ▶ Steun aan individuele boere ⇒ een-tot-een-mentorskap.
- ▶ Kennisoordrag en vaardigheidsontwikkeling ⇒ opleidingskursusse.
- ▶ Vinnige kennisoordrag deur massamedia ⇒ *Pula Imvula*-tydskrif.

1. Studiegroepaktiwiteit 1 – spanlede hou vergaderings met boere.

In hierdie verslagdoeningstydperk het ons 5 382 studiegroepvergaderings gehou met ontwikkelende boere wat by ons streeksontwikkelingskantore betrokke is.

- ▶ Die studiegroep vorm Graan SA se voetspoor in belangrike graan-produiserende streke.
- ▶ Dit bied aan ontwikkelende boere toetreevlaktoegang tot die program.
- ▶ Ons leer boere ken, en die boere leer om ons te vertrou.
- ▶ Identifiseer unieke uitdagings en geleenthede in 'n streek.
- ▶ Oordrag van inligting – teorie en praktyk.
- ▶ Span is instrumenteel om plaaslike boerderystelsels by te werk.

2. Studiegroepaktiwiteit 2 – demonstrasieproewe.

In hierdie verslagdoeningstydperk is 16 demonstrasieproewe deur ons streeksontwikkelingsbestuurders aangeplant.

- ▶ "Vertel my en ek vergeet. Leer my en ek onthou. Betrek my en ek leer." – Benjamin Franklin.
- ▶ Span en boere beplan en beplant demonstrasieproewe.
- ▶ Boere sien die voordele daarvan om dinge anders te doen.
- ▶ Boere leer die beste as hulle self in hulle eie omgewing sien – hulle is meer bereid om na doeltreffende boerderymetodes oor te skakel.

3. Studiegroepaktiwiteit 3 – bied boeredae aan.

In hierdie verslagdoeningstydperk is 41 boeredae deur ons streeksontwikkelingskantore aangebied.

- ▶ Boeredae word gereël om boere te bring om self na die demonstrasieproewe te kom kyk.
- ▶ Geleentheid word ook aan boere gegee om ander belanghebbendes in die sektor te ontmoet.
- ▶ Boere leer van landboukundiges en bedryfsvertegenwoordigers.
- ▶ Die boerderygemeenskap kry die geleentheid om bekommernisse te lug en uitdagings te bespreek.

4. Ondersteuningsdienste aan individuele boere – aktiwiteit 1: Een-tot-een-mentorskap.

Ons spanlede het in hierdie verslagdoeningstydperk 798 besoeke aan plase gebring.

- ▶ In enige ontwikkelingsprogram moet daar persone wees wat toenemende onafhanklikheid en ondernemingsgroei toon.
- ▶ Die span ondersteun ontwikkelende boere wat verder gevorder het as die dienste wat deur die studiegroep aangebied word.
- ▶ Hierdie boere is feitlik gereed om onafhanklik te boer, maar baat steeds by mentorskap.

5. Ondersteuningsdienste aan individuele boere – aktiwiteit 2: Plaasbesoeke.

- ▶ Individuele steun aan boere sluit mentorskapbesoeke in.
- ▶ Gedetailleerde beplanning, begrotingshersiening, bestuur, ensovoorts word bespreek.
- ▶ Die span voer 'n assessering van die hele plaas uit en maak aanbevelings.
- ▶ Plaasbesoeke help boere met praktiese prosesse en die monitering van gewasse.

Nuwe Era Boer van die Jaar-kompetisie

26 hoëpresterende boere uit verskillende kategorieë het aan ons 2019 Boer van die Jaar-kompetisie deelgeneem.

- ▶ Om rolmodelle te identifiseer om ander boere te inspireer.
- ▶ 'n Oomblik om die leerprosesse, ontwikkeling en groei wat plaasgevind het te vier.

6. A monthly magazine: *Pula Imvula* – widespread dissemination of relevant information.

A *Pula Imvula* magazine was published and distributed every month from October 2018 to September 2019.

- ▶ Media in all its forms has a crucial role to play in the development agenda to ensure that citizens are well informed.
- ▶ Mass media can fulfil a critical role as a low-cost alternative to channel information to large audiences in remote regions.

7. Farmer training.

470 training courses were held for developing farmers and farm workers during this period of reporting. 6 986 farmers, farm workers and farming contractors attended these courses.

- ▶ Grain SA training courses are designed to meet specific needs identified in farming communities.
- ▶ The courses focus on knowledge transfer and skills development. Skills development in agriculture is an investment in the future.
- ▶ The courses are specifically tailored for developing farmers and balance theory with a practical hands-on approach. Farmers and farm workers are taught relevant courses that should immediately impact their farming operations.
- ▶ Course attendees are given instruction in a language they can understand.
- ▶ Course manuals are handed to farmers to take home for future reference purposes.

8. Grain SA Schools Programme.

316 school visits were made by team members in this period of reporting. This initiative recognises the potential of youth to make a significant impact on the agricultural sector if they can be alerted to the urgent need for them to participate as future farmers or in other careers in agriculture. Africa is a young continent with 65% population below 35 years of age and 10 to 12 million young people estimated to enter the work force every year.

9. Internship programme – Eastern Cape.

There were 17 interns in the programme for this period of reporting.

- ▶ The aim is to give young graduates who may be future farmers or potential extension officers, the opportunity to work closely with experienced members of the team, to learn admin skills and be exposed to teaching platforms.
- ▶ They may attend training courses run by Grain SA so as to entrench knowledge and skills in a meaningful and practical manner beyond their academic qualifications.
- ▶ Some of the 2018 interns have been contracted to assist the Farmer Development team as junior mentors.

6. 'n Maandelikse tydskrif: *Pula Imvula* – wye verspreiding van relevante inligting.

'n *Pula Imvula*-tydskrif is elke maand vanaf Oktober 2018 tot September 2019 gepubliseer en versprei.

- ▶ Media in alle vorme het 'n noodsaaklike rol om in die ontwikkelingsagenda te speel om te verseker dat burgers goed ingelig bly.
- ▶ Massamedia kan as laekoste-alternatief 'n kritieke rol speel om inligting na groot gehore in afgeleë streke toe te kanaliseer.

7. Opleiding van boere.

470 opleidingskursusse is gedurende die verslagdoeningstydperk vir ontwikkelende boere en plaaswerkers aangebied. Hierdie kursusse is deur 6 986 boere, plaaswerkers en plaaskontraakteurs bygewoon.

- ▶ Graan SA se opleidingskursusse is ontwerp om te voldoen aan spesifieke behoeftes wat in boerderygemeenskappe geïdentifiseer is.
- ▶ Die kursusse fokus op kennisoordrag en vaardigheidsontwikkeling. Vaardigheidsontwikkeling in landbou is 'n belegging in die toekoms.
- ▶ Die kursusse is spesifiek ontwerp vir ontwikkelende boere en balanseer teorie en 'n praktiese benadering. Boere en plaaswerkers voltooi relevante kursusse wat 'n onmiddellike impak op hulle boerderybedrywighede behoort te hê.
- ▶ Kursusgangers word onderrig in 'n taal wat hulle verstaan.
- ▶ Boere ontvang kursushandleidings om huis toe te neem vir toekomstige verwysing.

8. Graan SA se Skoleprogram.

Spanlede het in die verslagdoeningstydperk 316 besoeke aan skole afgelê. Hierdie inisiatief erken die potensiaal van die jeug om 'n beduidende impak op die landbousektor te maak as hulle bewus gemaak kan word van die dringende behoefte om as toekomstige boere of in ander loopbane aan landbou deel te neem. Afrika is 'n jong vasteland met 65% van sy bevolking wat jonger as 35 jaar is, en 10 tot 12 miljoen jongmense wat na raming elke jaar die arbeidsmag betree.

9. Internskapprogram – Oos-Kaap.

Daar was 17 interns in die program gedurende die verslagdoeningstydperk.

- ▶ Die doel van die program is om aan jong gegradueerdes wat moontlik toekomstige boere of potensiële voorligtingsbeamptes kan wees die geleentheid te gee om nou met ervare lede van die span saam te werk, administratiewe vaardighede te leer en aan onderrigplatforms blootgestel te word.
- ▶ Hulle kan opleidingskursusse bywoon wat deur Graan SA aangebied word ten einde hulle kennis en vaardighede vas te lê op 'n betekenisvolle en praktiese manier wat verder as hulle akademiese kwalifikasies strek.
- ▶ Sommige van die 2018-interns is gekontrakteer om die Landbou-ontwikkelingspan as junior mentors by te staan.

REGIONAL FARMER DEVELOPMENT UNDER THE MICROSCOPE

1. Dundee regional development office

Farmers in this region have access to 3 556 ha of arable land. The mentors supporting regional development manager Graham Engelbrecht were Gareth Alcock, Chris de Jager, Rob Irons, Ludwig Wichmann and Paul Wiggill.

As at 30 September 2019 there were 1 725 members of 26 study groups who'd been afforded 909 learning encounters. There were 118 farm visits to individual farmers. The Dundee office held five farmers days. Many small farmers also participated in the From Subsistence to Abundance project which was implemented over a five-year period. The mentors made a significant impact on the farming activities of farmers in the regions.

- Jobs Fund Farmers 2018/2019: 758
- Hectares planted in Jobs Fund project: 1 085

2. Kokstad regional development office

The regional development manager is Luke Collier. This office services study groups, training and mentorship to farmers distributed from Queenstown and the southern borders of Lesotho to Ixopo and Umzimkulu in KwaZulu-Natal and primarily mentors subsistence and smallholder farmers. The members have access to 8 673 ha arable land.

STREEKSLANDBOU-ONTWIKKELING ONDER DIE MIKROSKOOP

1. Dundee-streeksontwikkelingskantoor

Boere in hierdie streek het toegang tot 3 556 ha bewerkbare grond. Die mentors wat streeksontwikkelingsbestuurder Graham Engelbrecht ondersteun het, was Gareth Alcock, Chris de Jager, Rob Irons, Ludwig Wichmann en Paul Wiggill.

Teen 30 September 2019 was daar 1 725 lede van 26 studiegroepe wat 909 opleidingsgeleenthede gehad het. Daar was 118 plaasbesoeke aan individuele boere. Die Dundee-kantoor het vyf boeredae aangebied. Talle kleinboere het ook aan die "From Subsistence to Abundance"-projek deelgeneem, wat oor 'n vyfjaartydperk geïmplementeer is. Die mentors het 'n beduidende impak op die boerdery-aktiwiteite van boere in die streke gemaak.

- Jobs Fund-boere 2018/2019: 758
- Hektaar in die Jobs Fund-projek geplant: 1 085

2. Kokstad-streeksontwikkelingskantoor

Die streeksontwikkelingsbestuurder is Luke Collier. Hierdie kantoor diens studiegroepe, opleiding en mentorskap aan boere wat van Queenstown en die suidelike grens van Lesotho tot Ixopo en Umzimkulu in KwaZulu-Natal woon, en tree primêr as mentors vir bestaans- en kleinskaalse boere op. Die lede het toegang tot 8 673 ha bewerkbare grond.

The mentors were Trevor Dicks, Fanie du Plessis, Lourie Janse van Rensburg, Chooks Louwrens and Eric Wiggill.

During 2017/2018 Grain SA mentored young graduates with support from the Department of Rural Development and Agrarian Reform (DRDAR). Some individuals were promoted as junior mentors this year. The seven junior mentors based in Kokstad were Portia Buso, Phumlile Giwu, Khotso Male, Sidimakazi Manciya, Lunga Mhlonyane, Phumza Mtukushe and Ziphiwo Tshutshane.

As at 30 September 2019 there were 2 758 farmers who were members of 50 study groups and they have had 1 047 mentoring encounters. In this period of reporting 47 on-farm visits were made to individual farmers. In total eight farmers days were held and five demonstration plots were planted.

Many farmers participated in the From Subsistence to Abundance project.

- Jobs Fund farmers 2018/2019: 1 285
- Hectares planted in Jobs Fund: 1 505
- Farm Worker Jobs Fund 2018/2019: 64

3. Ladybrand regional development office

This office is managed by regional development manager Johan Kriel. Agriculture here inclines towards more large-scale farming ventures. This office services farmers from Bethlehem and Fouriesburg to Wesselsbron and Bothaville and Deneysville near the Vaal Dam. Mixed cropping along with livestock farming are major economic activities. The Grain SA members in this region currently have access to 31 142 ha of arable land.

As at 30 September 2019 there were 358 farmers members of the ten study groups. There were 33 meetings and 195 farm visits while one demonstration plot was planted this year. A number of different projects with different financial arrangements enabled farmers to grow their farming businesses:

- AB InBev: 16 farmers
- DRDRL Recap: 10 farmers
- REID farmers: 23 farmers
- Zamukhele Bean Project: 64 farmers

4. Lichtenburg regional development office

Regional development manager Du Toit van der Westhuizen is based in Lichtenburg. This office services from Delareyville to Mahikeng and Hammanskraal. This region has experienced drought for a number of years. Farmers here need much support. The farmer members have access to 36 160 ha of arable land.

As at 30 September 2019 there were 355 members of 17 study groups and they had 35 meetings. Farmers who received individual support received 180 on-farm visits. Four farmers days were held this year. Some farmers in this region were involved in projects aimed at facilitating farmer development with supportive financial arrangements.

- AB InBev 2018/2019: 12 farmers
- Zamukhele Bean Project: 6 farmers

5. Louwsburg regional development office

Jurie Mentz is the regional manager at Louwsburg. The office services farmers from Louwsburg and Vryheid in KwaZulu-Natal to as far north as Bronkhorstspuit and Middelburg. Farmers are primarily subsistence and smallholder farmers. Farmers here have access to 9 915 ha of arable land.

As at 30 September 2019 there were 1 424 farmers who were members of the 14 study groups. There were 504 meetings in this period of reporting. Altogether six farmers days were held and six demonstration plots were planted. The From Subsistence to Abundance project was successfully rolled out in this region over the past five years and many positive signs of farmer development can be seen:

- Jobs Fund farmers 2018/2019: 556
- Hectares planted in Jobs Fund: 964
- Farm Worker Jobs Fund 2018/2019: 254

Die mentors was Trevor Dicks, Fanie du Plessis, Lourie Janse van Rensburg, Chooks Louwrens en Eric Wiggill.

Gedurende 2017/2018 het Graan SA met die steun van die Departement van Landelike Ontwikkeling en Grondhervorming (DRDAR) jong gegradueerdes gementor. Sommige individue is hierdie jaar tot junior mentors bevorder. Die sewe junior mentors wat in Kokstad gebaseer was, was Portia Buso, Phumlile Giwu, Khotso Male, Sidimakazi Manciya, Lunga Mhlonyane, Phumza Mtukushe en Ziphiwo Tshutshane.

Op 30 September 2019 was 2 758 boere lede van 50 studiegroepe, en hulle het 1 047 mentorsessies gehad. In hierdie verslagdoenings-tydperk is 47 plaasbesoeke aan individuele boere gemaak. 'n Totaal van agt boeredae is gehou en vyf demonstrasieproewe is aangeplant.

Talle boere het aan die "From Subsistence to Abundance"-projek deelgeneem.

- Jobs Fund-boere 2018/2019: 1 285
- Hektaar in die Jobs Fund-projek geplant: 1 505
- Plaaswerker-Jobs Fund 2018/2019: 64

3. Ladybrand-streeksontwikkelingskantoor

Hierdie kantoor word deur streeksontwikkelingsbestuurder Johan Kriel bestuur. Landbou in dié gebied behels meer grootskaalse boerdery-ondernemings. Die kantoor bedien boere van Bethlehem en Fouriesburg tot Wesselsbron en Bothaville en Deneysville naby die Vaaldam. Gemengde gewasverbouing saam met veeboerdery is belangrike ekonomiese aktiwiteite. Die Graan SA-lede in hierdie streek het tans toegang tot 31 142 ha bewerkbare grond.

Teen 30 September 2019 was daar 358 boere wat lede van die tien studiegroepe was. Altesaam 33 vergaderings en 195 plaasbesoeke het plaasgevind, terwyl een demonstrasieproef hierdie jaar geplant is. 'n Aantal verskillende projekte met verskillende finansiële reëlings het boere in staat gestel om hulle boerderyonderneming te laat groei:

- AB InBev: 16 boere
- DRDRL-herkapitalisering: 10 boere
- REID-boere: 23 boere
- Zamukhele-boneprojek: 64 boere

4. Lichtenburg-streeksontwikkelingskantoor

Streeksontwikkelingsbestuurder Du Toit van der Westhuizen is op Lichtenburg gebaseer. Hierdie kantoor bedien 'n gebied van Delareyville tot Mahikeng en Hammanskraal. Die streek ervaar reeds 'n aantal jaar lank droogte. Boere hier het baie steun nodig. Die boerelede het toegang tot 36 160 ha bewerkbare grond.

Teen 30 September 2019 was daar 355 lede van 17 studiegroepe, en hulle het 35 keer vergader. Boere wat individuele steun ontvang het, is 180 keer op hulle plase besoek. Vier boeredae is hierdie jaar gehou. Sommige boere in hierdie streek was betrokke by projekte wat daarop gemik was om landbou-ontwikkeling te fasiliteer, met ondersteunende finansiële reëlings.

- AB InBev 2018/2019: 12 boere
- Zamukhele-boneprojek: 6 boere

5. Louwsburg-streeksontwikkelingskantoor

Jurie Mentz is die streeksbestuurder by Louwsburg. Die kantoor bedien boere vanaf Louwsburg en Vryheid in KwaZulu-Natal tot so ver noord as Bronkhorstspuit en Middelburg. Boere is primêr bestaans- en kleinskaalse boere. Boere hier het toegang tot 9 915 ha bewerkbare grond.

Teen 30 September 2019 was daar 1 424 boere wat lede van die 14 studiegroepe was. Sowat 504 vergaderings het in die verslagdoeningstydperk plaasgevind, ses boeredae is gehou en ses demonstrasieproewe is aangeplant. Die "From Subsistence to Abundance"-projek is die afgelope vyf jaar met sukses in hierdie streek aangebied, en talle positiewe tekens van landbou-ontwikkeling is sigbaar:

- Jobs Fund-boere 2018/2019: 556
- Hektaar in Jobs Fund geplant: 964
- Plaaswerker-Jobs Fund 2018/2019: 254

6. Maclear regional development office

The activities in this region are currently managed from Head Office and facilitated by Sarel Pretorius from Elliot and Cala to Mount Fletcher and Maclear, along the foothills of the Drakensberg escarpment. This office primarily mentors subsistence and smallholder farmers who have access to 3 001 ha of arable land.

As at 19 September 2019 there were 998 farmers who are members of 22 study groups and they have had 197 learning encounters. The Jobs Fund farmer participants were as follows:

- Jobs Fund farmers: 197
- Hectares planted in Jobs Fund: 589
- Farm Worker Jobs Fund 2018/2019: 59

7. Mthatha regional development office

Sinelizwi Fakade served as the regional development manager of Mthatha Regional Development office. He was assisted by the following mentors: Ntombizandile Cewu, Mfuneko Nodada, Cornwell Ndzelu, Lawrence Luthango, Xhamakazi Sali, Azukiswe Sigaba, Jacobson Madikizela, Wilfred Siboyana and Johan Nel.

During 2017/2018 Grain SA mentored a number of young graduates in the programme with DRDAR. Some were promoted to serve as junior mentors: Mawande Bango, Siphesihle Cabane, Bongiswa Konzani, Zoliswa Mdikane, Siyabomga Mqina, Iris Mtshabe, Sinegugu Ndamase, Thandile Ndimba, Yonela Sisusa and Sisipho Sobekwa.

The office manages study groups, training and mentorship to farmers distributed from the south near East London and Willowvale to as far as Queenstown, Cofimvaba and Mthatha. The Grain SA farmers in the programme have access to 5 702 ha of arable land.

As at 30 September 2019 there were 3 373 farmer members of 70 study groups. 2 327 meetings were held and 33 farm visits provided one-to-one mentoring. Four farmers days were held.

The project From Subsistence to Abundance saw encouraging development:

- Jobs Fund farmers 2018/2019: 2 084
- Hectares planted in Jobs Fund: 2 746
- Farm Worker Jobs Fund 2018/2019: 53

8. Nelspruit regional development office

Regional development manager Jerry Mthombathi is based in Nelspruit. He is assisted by two mentors, namely Shadrack Mabuza and Agnes Mndawe.

The office services an area east of Pretoria to the Eswatini border and further east to the borders of the Kruger National Park. Whilst many farmers are experiencing small successes, here is still much work to be done as production remains well below regional potential.

As at 30 September 2019 there are 1 881 farmer members of 20 study groups who were afforded 212 learning encounters. 98 farm visits provided on-farm support. Six farmers days were held and five demonstration trial plots were planted.

A number of farmers here participated in the From Subsistence to Abundance project:

- Jobs Fund farmers 2018/2019: 335
- Hectares planted in Jobs Fund: 426
- Farm Worker Jobs Fund 2018/2019: 89

9. Paarl regional development office

The Grain SA Regional Development office in Paarl is managed by development manager, Liana Stroebel. The programme aims to promote production of wheat and barley in the Western Cape, to upskill and empower developing farmers and farm workers and disseminate information to the developing sector in the interests of the broader winter cereals industry. The team worked with 24 farming entities and 79 farmers. In total 59 on-farm visits were made and eight farmers days were held.

6. Maclear-streeksontwikkelingskantoor

Die aktiwiteite in hierdie streek word tans uit hoofkantoor bestuur en vanaf Elliot en Cala tot by Mount Fletcher en Maclear en al langs die Drakensberg-eskarp deur Sarel Pretorius gefasiliteer. Hierdie kantoor mentor hoofsaaklik bestaans- en kleinskaalse boere wat toegang het tot 3 001 ha bewerkbare grond.

Teen 19 September 2019 was daar 998 boere wat lede van die 22 studiegroepe was, en hulle het 197 opleidingsgeleenthede gehad. Die Jobs Fund-boeredeelneemers was soos volg:

- Jobs Fund-boere: 197
- Hektaar in Jobs Fund geplant: 589
- Plaaswerker-Jobs Fund 2018/2019: 59

7. Mthatha-streeksontwikkelingskantoor

Sinelizwi Fakade was die streeksontwikkelingsbestuurder uit die Mthatha-streeksontwikkelingskantoor. Hy is deur die volgende mentors bygestaan: Ntombizandile Cewu, Mfuneko Nodada, Cornwell Ndzelu, Lawrence Luthango, Xhamakazi Sali, Azukiswe Sigaba, Jacobson Madikizela, Wilfred Siboyana en Johan Nel.

In 2017/2018 het Graan SA saam met die DRDAR 'n aantal jong gegradueerdes in die program gementor. Sommige van hulle is bevorder om as junior mentors te dien: Mawande Bango, Siphesihle Cabane, Bongiswa Konzani, Zoliswa Mdikane, Siyabomga Mqina, Iris Mtshabe, Sinegugu Ndamase, Thandile Ndimba, Yonela Sisusa en Sisipho Sobekwa.

Die kantoor bestuur studiegroepe, opleiding en mentorskap aan boere wat vanaf die suide naby Oos-Londen en Willowvale tot so ver as Queenstown, Cofimvaba en Mthatha versprei is. Die Graan SA-boere in die program het toegang tot 5 702 ha bewerkbare grond.

Teen 30 September 2019 was 3 373 boere lede van 70 studiegroepe. Gedurende die oorsigjaar is 2 327 vergaderings gehou en 33 plaasbesoeke afgelê ten einde een-tot-een-mentorskap te verskaf. Vier boeredae is aangebied.

Bemoedigende ontwikkeling het in die "From Subsistence to Abundance"-projek plaasgevind:

- Jobs Fund-boere 2018/2019: 2 084
- Hektaar in Jobs Fund geplant: 2 746
- Plaaswerker-Jobs Fund 2018/2019: 53

8. Nelspruit-streeksontwikkelingskantoor

Streeksontwikkelingsbestuurder Jerry Mthombathi is in Nelspruit gebaseer. Hy word deur twee mentors, Shadrack Mabuza en Agnes Mndawe, bygestaan.

Die kantoor bedien 'n gebied oos van Pretoria tot by die grens met Eswatini, en verder oos tot by die grens van die Kruger Nasionale Park. Hoewel talle boere klein suksesse ervaar, is daar nog baie werk om te doen, aangesien produksie heelwat laer as die streekspotensiaal is.

Teen 30 September 2019 was daar 1 881 boere wat lede van 20 studiegroepe was, en 212 opleidingsgeleenthede is verskaf. Die kantoor het tydens 98 plaasbesoeke steun op plase verskaf. Ses boeredae is gehou en vyf demonstrasieproewe is aangeplant.

'n Aantal boere hier het aan die "From Subsistence to Abundance"-projek deelgeneem:

- Jobs Fund-boere 2018/2019: 335
- Hektaar in Jobs Fund geplant: 426
- Plaaswerker-Jobs Fund 2018/2019: 89

9. Paarl-streeksontwikkelingskantoor

Die Graan SA-streeksontwikkelingskantoor in die Paarl word deur Liana Stroebel as ontwikkelingsbestuurder bestuur. Die doel van die program is om die produksie van koring en gars in die Wes-Kaap te bevorder, ontwikkelende boere en plaaswerkers se vaardighede te verbeter en hulle te bemagtig, en in die belang van die breër wintergraanbedryf inligting aan die ontwikkelende sektor te versprei. Die span het met 24 boerdery-entiteite en 79 boere gewerk. Altesaam 59 besoeke is op plase afgelê en agt boeredae is aangebied.

PROJECT MANAGEMENT HIGHLIGHTS

- ▶ Under the leadership of Jane McPherson, Grain SA Farmer Development Programme has achieved consistent clear audit reports.
- ▶ Web-based reporting – with high levels of accountability being a priority, an interactive web-based reporting system has been designed. Project monitoring and progress tracking is available at the touch of a finger.

DELIVERING QUALITY AGRICULTURAL TRAINING

A common characteristic of developing farmers who join Grain SA is lack of exposure to new information and best practices. Knowledge about modern agriculture is poor and skills in advanced grain production are compromised. Training to address such knowledge gaps is essential for sustainable development.

Good training courses increase potential so farmers:

- ▶ Become better custodians of the earth.
- ▶ Invest into soil health.
- ▶ Take better care of the environment.
- ▶ Participate in safer food production and storage systems.
- ▶ Improve water conservation practices.
- ▶ Practise better weed control.
- ▶ Use chemicals wisely.
- ▶ See increased profitability.
- ▶ Increase household food/nutrition security.

Did you know?

- ▶ Courses are structured to address theory and practical application on a wide range of topics.
- ▶ Training is in a language farmers understand.
- ▶ Training is designed to make immediate impact on farming businesses, workshop management knowledge and plant production.
- ▶ Feedback from farmers reassures us we are equipping them meaningfully.

Courses presented Kursusse aangebied	
Advanced maize production and marketing/ Gevorderde mielieproduksie en bemarking	6
Basic engine repair/Basiese enjinherstelwerk	2
Business ethics/Sake-etiek	4
Contractors course/Kontrakteurskursus	5
Farming for profits/Boer vir wins	8
Introduction to dry bean production/Inleiding tot droëboonproduksie	79
Introduction to groundnut production/Inleiding tot grondboonproduksie	10
Introduction to maize production/Inleiding tot mielieproduksie	33
Introduction to soybean production/Inleiding tot sojaboonproduksie	3
Introduction to sunflower production/Inleiding tot sonneblomproduksie	2
Introduction to wheat production/Inleiding tot koringproduksie	2
Nixtamalization/Nikstamalisering	209
Nutrition: Different food groups/Voeding: Verskillende voedselgroepe	42
Practical skills course – setting of implements/Kursus in praktiese vaardighede – instel van implemente	8
Resource assessment and farm planning/Hulpbronevaluering en plaasbeplanning	8
Safe handling of tools and farm equipment/Veilige hantering van gereedskap en plaastoerusting	2
Tractor and farm implement maintenance/Instandhouding van trekkers en plaasimplemente	24
Tractor maintenance part 1/Trekkerinstandhouding deel 1	1
Workshop skills (power tools)/Werkswinkelvaardighede (kraggereedskap)	1
Workshop skills (welding)/Werkswinkelvaardighede (sweiswerk)	5

PROJEKBESTUURSHOOGTEPUNTE

- ▶ Onder die leiding van Jane McPherson het die Graan SA Landbou-ontwikkelingsprogram konsekwent skoon ouditverslae ontvang.
- ▶ Webgebaseerde verslagdoening – aangesien hoë vlakke van aanspreeklikheid 'n prioriteit is, is 'n interaktiewe webgebaseerde verslagdoeningstelsel ontwerp. Projekmonitering en navolging van vordering is feitlik met die druk van 'n knoppie beskikbaar.

VERSKAFFING VAN LANDBOU-OPLEIDING VAN GEHALTE

'n Algemene eienskap van ontwikkelende boere wat by Graan SA aansluit, is 'n gebrek aan blootstelling aan nuwe inligting en beste praktyke. Kennis oor moderne landbou is swak en vaardighede in gevorderde graanproduksie nie ver genoeg ontwikkel nie. Opleiding om hierdie kennisgapings te hanteer, is noodsaaklik vir volhoubare ontwikkeling.

Goeie opleidingskursusse verhoog potensiaal sodat boere:

- ▶ Beter bewaarders van die aarde word.
- ▶ In die gesondheid van die grond belê.
- ▶ Beter vir die omgewing sorg.
- ▶ Aan veiliger voedselproduksie en opbergingstelsels deelneem.
- ▶ Waterbewaringspraktyke verbeter.
- ▶ Beter onkruidbeheer toepas.
- ▶ Chemikalieë verstandig gebruik.
- ▶ Hulle winsgewendheid verbeter.
- ▶ Huishoudelike voedsel-/voedingsekerheid verbeter.

Het jy geweet?

- ▶ Kursusse word gestruktureer om die teorie en praktiese toepassing van 'n reeks onderwerpe te hanteer.
- ▶ Opleiding vind plaas in 'n taal wat boere verstaan.
- ▶ Opleiding is ontwerp om 'n onmiddellike impak op die boerdery, werkwinkelbestuurskennis en plantproduksie te maak.
- ▶ Terugvoer van boere stel ons gerus dat ons hulle betekenisvol toerus.

Kursusontwikkeling

Ons ontwikkel kursusse op grond van behoeftes wat deur bestuurders en boere self geïdentifiseer word.

Boere het gefokusde inligting nodig wat op hulle bedrywighede betrekking het en vinnig van hulle beter boere sal maak.

Opleidingsdoelwitte

- ▶ Kursusgangers ontvang 'n handleiding.
- ▶ Graan SA Landbou-ontwikkelingsprogram se opleiding is by AgriSeta geakkrediteer.
- ▶ Opleidingskursusse word na boere toe geneem.
- ▶ Kursusfasiliteerders word vir hulle tegniese vaardighede en taalvaardigheid gekies.

Maize Trust courses: 78 courses; 1 537 learners Mielietrust-kursusse: 78 kursusse, 1 537 studente

Advanced maize production and marketing/Gevorderde mielieproduksie en bemarking
Basic engine repair/Basiese enjinherstelwerk
Business ethics/Sake-etiek
Contractors course/Kontrakteurskursus
Farming for profits/Boer vir wins
Financial management and costings/Finansiële bestuur en kosteberekening
Introduction to maize production/Inleiding tot mielieproduksie
Resource assessment and farm planning/Hulpbronevaluering en plaasbeplanning
Tractor and farm implement maintenance/Instandhouding van trekkers en plaasimplemente
Workshop skills (welding)/Werkswinkelvaardighede (sweiswerk)

Course development

We develop courses based on needs identified by managers and farmers themselves.

Farmers need target information relevant to their operations that will make them better farmers fast.

Training goals

- ▶ Course attendees receive a manual.
- ▶ Grain SA Farmer Development training is accredited by AgriSeta.
- ▶ Training courses are taken to farmers.
- ▶ Course facilitators are selected for their technical skills and language competency.

Achievements in 2018/2019

- ▶ 470 courses were presented.
- ▶ 6 986 farmers, farm workers and farming contractors attended courses.
- ▶ Donors involved: AB InBev, DSI, Maize Trust, OPOT and Winter Cereal Trust

Winter Cereal Trust Courses: 19 courses; 147 learners

Wintergraantrust-kursusse: 19 kursusse, 147 studente

Farming for profits/Boer vir wins

Introduction to wheat production/Inleiding tot koringproduksie

Practical skills course – setting of implements/Kursus in praktiese vaardighede – stel van implemente

Safe handling of tools and farm equipment/Veilige hantering van gereedskap en plaastoerusting

Tractor and farm implement maintenance/Instandhouding van trekkers en plaasimplemente

Workshop skills (power tools)/Werkswinkelvaardighede (kraggereedskap)

TRAINING IN FUTURE

- Funding is required to translate manuals.
- Need more courses to meet demand.
- This project is on-going.

Knowledge transfer: *Pula Imvula*

The *Pula Imvula* magazine is a sector specific publication which is well received by farmers who give feedback that they find the information relevant and easy to understand.

- The magazine makes information available to all involved in the grain industry.
- The expanded English edition includes more advanced technical information.

Prestasies in 2018/2019

- ▶ 470 kursusse is aangebied.
- ▶ 6 986 boere, plaaswerkers en boerderykontraakteurs het kursusse bygewoon.
- ▶ Skenkers wat betrokke was, is AB InBev, Departement van Wetenskap en Innovasie, Mielietrust, OPOT en die Wintergraantrust.

AB InBev Courses: 13 courses; 142 learners

AB InBev-kursusse: 13 kursusse, 142 studente

Advanced maize production and marketing/Gevorderde mielieproduksie en bemarking

Contractors course/Kontraakteurskursus

Resource assessment and farm planning/Hulpbronevaluering en plaasbeplanning

Tractor and farm implement maintenance/Instandhouding van trekkers en plaasimplemente

Department of Science and Innovation courses: 343 courses; 4 792 learners

Kursusse van Departement van Wetenskap en Innovasie: 343 kursusse, 4 792 studente

Introduction to dry bean production/Inleiding tot droëboonproduksie

Nixtamilization/Nikstamalisering

Nutrition: Different food groups/Voeding: Verskillende voedselgroepe

OPOT Courses: 17 courses; 306 learners

OPOT-kursusse: 17 kursusse, 306 studente

Introduction to groundnut production/Inleiding tot grondboonproduksie

Introduction to soybean production/Inleiding tot sojaboonproduksie

Canola production/Kanolaproduksie

Introduction to sunflower production/Inleiding tot sonneblomproduksie

TOEKOMSTIGE OPLEIDING

- Befondsing is nodig om handleidings te vertaal.
- Nog kursusse is nodig om in die vraag te voorsien.
- Hierdie projek is deurlopend.

Kennisoordrag: *Pula Imvula*

Die *Pula Imvula*-tydskrif is 'n sektor-spesifieke publikasie wat goed deur boere ontvang word. Hulle terugvoer is dat die inligting relevant is, en maklik om te verstaan.

- Die tydskrif stel inligting beskikbaar aan almal wat by die graanbedryf betrokke is.
- Die uitgebreide Engelse uitgawe sluit meer gevorderde tegniese inligting in.



AIMS OF *PULA IMVULA*: A BROADCASTING TOOL FOR WIDESPREAD INFORMATION DISSEMINATION

- ▶ To disseminate timely industry information through a monthly magazine.
- ▶ To publish it in seven indigenous languages.
- ▶ To source sponsorship for a full colour magazine for meaningful visual impact.

WHAT HAS BEEN ACHIEVED?

- ▶ Specialist technical agricultural journalists have covered relevant topics.
- ▶ Distribution statistics as at August 2019:

ENGLISH ENGELS	AFRIKAANS	SESOTHO SUID-SOTHO	SETSWANA TSWANA	SESOTHO SA LEBOA NOORD-SOTHO	ISIZULU ZULU	ISIXHOSA XHOSA	TOTAL TOTAAL
1 684	336	1 718	1 022	237	5 026	6 459	16 482

- ▶ We now offer most articles online via www.grainsa.co.za.

DONORS

- ▶ Maize Trust – monthly, eight pages
- ▶ Winter Cereal Trust – quarterly, four pages
- ▶ OPOT – quarterly, four pages
- ▶ Input suppliers sponsor another eight pages in the English *Pula Imvula* with more technical articles.

MATTERS OF INTEREST

- Infoworks has established a working relationship with two universities: North-West University and University of Pretoria. The *Pula Imvula* magazine is made available on their library websites.
- Infoworks launched the magazine with a new look in the March 2019 issue.
- This is the only national agricultural development magazine issued in seven languages.

LOOKING AHEAD

- The publication has the continued power to effect knowledge transfer.
- It is an excellent tool to deliver industry-relevant information.
- This project addresses national policy which holds that development communication is a way of raising consciousness and awareness amongst communities on issues pertaining to a better life for all.

PARTNERSHIPS FOR PROGRESS

Grain SA's programme is widely acknowledged for successful farmer development and stakeholders applaud our contribution to transformation in the sector. A number of projects were implemented with other stakeholders this year:

- ▶ The Jobs Fund project – From Subsistence to Abundance.
- ▶ The Department of Science and Innovation.
- ▶ The Department of Rural Development and Land Reform Recap Programme in the Free State province.
- ▶ Support to farmers for mechanisation in the Eastern Cape through the Department of Rural Development and Agrarian Reform (DRDAR).
- ▶ Intern programmes with DRDAR.

1. Grain SA project: From Subsistence to Abundance

From Subsistence to Abundance was implemented from 2015 to 2019. During 2019 there was collaboration between:

- ▶ Grain SA Farmer Development.
- ▶ The Jobs Fund of the National Treasury.
- ▶ Bayer.
- ▶ SA Lime and Gypsum.
- ▶ Kynoch.
- ▶ Sasol Agriculture Trust.
- ▶ Department of Rural Development and Land Reform.
- ▶ Farmers.

DOELWITTE VAN *PULA IMVULA*: 'N INSTRUMENT OM INLIGTING WYD TE VERSPREI

- ▶ Om bedryfsinligting tydig deur middel van 'n maandelikse tydskrif te versprei.
- ▶ Om dit in sewe inheemse tale te publiseer.
- ▶ Om borgskappe te verkry vir 'n volkleurtydskrif sodat betekenisvolle visuele impak verkry word.

WAT IS BEREIK?

- ▶ Spesialis- tegniese landboujoernaliste dek tersaaklike onderwerpe.
- ▶ Verspreidingsstatistiek soos in Augustus 2019:

- ▶ Die meeste artikels is nou aanlyn beskikbaar op www.grainsa.co.za.

DONATEURS

- ▶ Mielietrust – maandeliks, agt bladsye
- ▶ Wintergraantrust – kwartaalliks, vier bladsye
- ▶ OPOT – kwartaalliks, vier bladsye
- ▶ Insetverskaffers borg nog agt bladsye in die Engelse *Pula Imvula* met meer tegniese artikels.

SAKE VAN BELANG

- Infoworks het 'n werksverhouding met twee universiteite: Noordwes-Universiteit en die Universiteit van Pretoria. Die *Pula Imvula*-tydskrif is op hulle biblioteekwebwerwe beskikbaar.
- Infoworks het die tydskrif in Maart 2019 met 'n nuwe voorkoms bekend gestel.
- Dit is die enigste nasionale landbou-ontwikkelingstydskrif wat in sewe tale uitgegee word.

VOORUITSKOING

- Die publikasie het deurlopend die vermoë om kennisoordrag te bewerkstellig.
- Dit is 'n uitstekende instrument om bedryfsrelevante inligting te verskaf.
- Hierdie projek hanteer nasionale beleid, wat bepaal dat ontwikkelings-kommunikasie 'n manier is om bewustheid onder gemeenskappe te verhoog oor kwessies wat op 'n beter lewe vir almal betrekking het.

VENNOOTSAPPE VIR VORDERING

Graan SA se program ontvang wye erkenning vir suksesvolle landbou-ontwikkeling en belanghebbendes loof ons bydrae tot transformasie in die sektor. 'n Aantal projekte is hierdie jaar saam met ander belanghebbendes geïmplementeer:

- ▶ Die Jobs Fund-projek – "From Subsistence to Abundance".
- ▶ Die Departement Wetenskap en Innovasie.
- ▶ Die Departement van Landelike Ontwikkeling en Grondhervorming se herkapitaliseringsprogram in die Vrystaat.
- ▶ Steun aan boere vir meganisering in die Oos-Kaap deur die Departement van Landelike Ontwikkeling en Landbouhervorming (DRDAR).
- ▶ Internprogramme saam met die DRDAR.

1. Graan SA-projek: "From Subsistence to Abundance"

"From Subsistence to Abundance" is van 2015 tot 2019 geïmplementeer. In 2019 was daar samewerking tussen:

- ▶ Graan SA Landbou-ontwikkelingsprogram.
- ▶ Die Jobs Fund van die Nasionale Tesourie.
- ▶ Bayer.
- ▶ SA Kalk en Gips.
- ▶ Kynoch.
- ▶ Sasol Landboutrust.
- ▶ Departement van Landelike Ontwikkeling en Grondhervorming.
- ▶ Boere.



Project purpose: Promote family food farming and create rural employment.

Regions: Mpumalanga, KwaZulu-Natal and the Eastern Cape.

Purpose: Providing upliftment and support to subsistence farmers towards household food security and sustainable livelihoods.

PROJECT PROCESS

- ▶ The Jobs Fund funded R1 for every R1 raised.
- ▶ Each farmer had a mentor who facilitated the project, arranged deliveries of inputs and knowledge transfer or skills development interventions.
- ▶ Farmers own contribution: R3 500/ha.
- ▶ Industry subsidised inputs like seed, fertiliser, top dressing, lime, chemicals and transport.

PROJECT FOCUS

- ▶ Use modern practices and technologies.
- ▶ Provide dedicated mentorship.
- ▶ Build knowledge through study group meetings and training.
- ▶ Teach about soil health to achieve higher yields.
- ▶ Teach chemical weed control.
- ▶ Advocate liming of fields.

These practices are not new to the commercial sector, but had not been widely adopted by subsistence farmers.

RESULTS ACHIEVED

Farmer Participation: During the 2018/2019 season farmers invested R25 378 500 own funds into the project.

Highlights

- ▶ Farmer participation increased year on year.
- ▶ Hectares planted increased annually.
- ▶ Significant yield increases were returned. In spite of challenging environmental conditions, progress can still clearly be seen.

Doel van projek: Bevorder familievoedselboerdery en skep werk in landelike omgewings.

Streke: Mpumalanga, KwaZulu-Natal en die Oos-Kaap.

Doel: Verskaf opheffing en steun om bestaansboere met huishoudelike voedselsekerheid en 'n volhoubare heenkome te help.

PROJEKORDERING

- ▶ Die Jobs Fund het R1 geskenk vir elke R1 wat ingesamel is.
- ▶ Elke boer het 'n mentor gehad wat die projek gefasiliteer het, aflewering van insette en kennisoordrag of vaardigheidsontwikkeling tussentyd gereël het.
- ▶ Boere se eie bydrae: R3 500/ha.
- ▶ Bedryfgesubsidieerde insette soos saad, kunsmis, topbemesting, kalk, chemikalieë en vervoer.

PROJEKFOKUS

- ▶ Gebruik moderne praktyke en tegnologie.
- ▶ Verskaf toegewyde mentorskap.
- ▶ Bou kennis deur studiegroepvergaderings en opleiding.
- ▶ Verskaf opleiding oor grondgesondheid om hoër opbrengste te behaal.
- ▶ Verskaf opleiding oor chemiese onkruidbeheer.
- ▶ Beveel die bekalking van landerye aan.

Hierdie praktyke is nie nuut tot die kommersiële sektor nie, maar is nie tot dusver wyd deur bestaansboere gebruik nie.

RESULTATE BEHAAL

Boeredeelname: In die 2018/2019-seisoen het boere R25 378 500 van hulle eie fondse in die projek belê.

Hoogtepunte

- ▶ Boeredeelname het van jaar tot jaar toegeneem.
- ▶ Die getal hektaar aangeplant het jaarliks gegroei.
- ▶ Beduidende verhogings in opbrengs is behaal. Ten spyte van uitdagende omgewingstoestande is vordering duidelik sigbaar.

YEAR JAAR	FARMERS BOERE	HECTARES PLANTED HEKTAAR AANGEPLANT	TONS HARVESTED TON GEOES	AVERAGE YIELD GEMIDDELDE OPBRENGS
2018/2019	5 242	7 314	26 279	3,59
2017/2018	3 783	5 258	22 392	4,26
2016/2017	2 908	4 181	17 112	4,09
2015/2016	1 575	1 458	2 160	1,48

Mapped lands track the project footprint in each development region. The following maps reflect the numbers of farmers and highlight the remoteness of some operations:

Gekarteerde landerye toon die projek se voetspoor in elke ontwikkelingstreek. Die volgende kaarte toon die getal boere en beklemtoon die afgeleë ligging van sommige projekte:

Dundee regional development office – 759 farmers
Dundee-streksontwikkelingskantoor – 759 boere



Louwsburg regional development office – 577 farmers
Louwsburg-streksontwikkelingskantoor – 577 boere



Kokstad regional development office – 1 289 farmers
Kokstad-streksontwikkelingskantoor – 1 289 boere



Maclear regional development office – 198 farmers
Maclear-streksontwikkelingskantoor – 198 boere



Increased insight into grain farming in deep rural South Africa:

- ▶ Participant farmers' fields were individually mapped by Grain SA mentors.
- ▶ Data was forwarded to BFAP (Bureau for Food and Agricultural Policy). It made it possible to profile each farmer, gain insight into climate and growing conditions and tailor information transfer appropriately for farmers.

Others benefitting from the project:

Farm workers	799
Contractors	53
Interns	17

Groter insig in graanboerdery in afgeleë landelike Suid-Afrika:

- ▶ Deelnemende boere se landerye is individueel deur Graan SA-mentors gekarteer.
- ▶ Data is aan BFAP (Buro vir Voedsel- en Landboubeleid) gestuur. Dit het dit moontlik gemaak om 'n profiel vir elke boer saam te stel, insig in klimaats- en groeitoestande te kry en inligtingoordrag vir elke boer aan te pas.

Ander wat by die projek baat:

Plaaswerkers	799
Kontrakteurs	53
Interns	17

PROJECT IMPLEMENTATION: TRAINING AND KNOWLEDGE TRANSFER

Farmer training comprised:

- ▶ Measurements and calculations
- ▶ Climatic requirements for maize production
- ▶ Soil and soil moisture retention
- ▶ Soil sampling
- ▶ Soil acidity
- ▶ Principles of conservation agriculture
- ▶ Plant growth
- ▶ Cultivar selection
- ▶ Plant population
- ▶ Planting depth
- ▶ Row with and spacing in the row
- ▶ Fertilisation and top dressing
- ▶ Weed control
- ▶ Control of Yellow Nut sedge
- ▶ Correct use of the hand held equipment and calibration of the knap sack sprayer

NEW CHALLENGES

- ▶ The physical harvest time has demanded more time and labour from farmers.
- ▶ Marketing is problematic for subsistence farmers who are far from markets.
- ▶ Time to harvest is not in farmers favour since the lands are grazed by communal cattle and cobs must be removed from the field before they have dried out enough.
- ▶ Issues around the safe storage of the grain on the cob have presented.
- ▶ Cobs have not dried off enough, the high moisture makes them an ideal breeding ground for mycotoxins resulting in loss of grain which becomes unusable, even harmful for livestock.
- ▶ We designed a wire cob cage with a roof to store cobs safely off the ground, improve ventilation.
- ▶ We need to educate farmers about the risks and dangers of theft, spoilage and mycotoxin contamination and management of grain.
- ▶ Hand shelling a bigger crop is tedious. Five small diesel-powered threshing machines were purchased but more are needed.

2. Grain SA project: Beyond Abundance

With no funding beyond the planned five-year project forthcoming from Jobs Fund, the project could have closed but the drive from farmers to continue farming better and build on what they've learned has given impetus to a new project: BEYOND ABUNDANCE.

This is our inspiration:

- ▶ Farmers have seen results in spite of challenging conditions like droughts and pests.
- ▶ Farmers are excited by the new possibilities there farming livelihoods offer them.
- ▶ Farmers have already put their hard-earned money 'in the bank' for the new season.
- ▶ Farmers have made it clear they wish to continue with Grain SA Farmer Development.

With a global focus on the 17 goals for a better world by 2030, it would be irresponsible of us to drop this ball which holds the potential of addressing issues like: No poverty; zero hunger; good health and wellbeing.

LOOKING AHEAD

The project BEYOND ABUNDANCE was launched in October 2019. Projected project participation was as follows:

SEASON	2019/2020	2020/2021	2021/2022
Number of farmers	5 500	6 050	6 655
Number of hectares	7 500	8 250	9 075

PROJEKIMPLEMENTERING: OPLEIDING EN KENNISOORDRAGING

Boere-opleiding het die volgende behels:

- ▶ Afmetings en berekenings
- ▶ Klimaatsvereistes vir mielieproduksie
- ▶ Grond en grondvogbehoud
- ▶ Grondmonsterneming
- ▶ Grondsuurheid
- ▶ Beginsels van bewaringslandbou
- ▶ Plantgroei
- ▶ Kultivarseleksie
- ▶ Plantdigtheid
- ▶ Plantdiepte
- ▶ Rye met en spasiëring in die ry
- ▶ Bemesting en topbemesting
- ▶ Onkruidbeheer
- ▶ Beheer van die geeluintjie
- ▶ Korrekte gebruik van handtoerusting en kalibrering van die rugsaksproeier

NUWE UITDAGINGS

- ▶ Die fisiese oestyd het meer tyd en arbeid van boere geveer.
- ▶ Bemesting is problematies vir bestaansboere wat ver van markte is.
- ▶ Die tyd waarop geoes word, is nie vir boere gunstig nie omdat die grond deur gemeenskaplike beeste beweë word en koppe uit die land verwyder moet word voordat dit genoeg uitgedroog het.
- ▶ Probleme met die veilige opberging van die graan aan die kop het opgeduik.
- ▶ Koppe het nie droog genoeg geword nie, en die hoë voginhoud maak dit die ideale teelaarde vir mikotoksiene, wat tot die verlies van graan lei, wat dan onbruikbaar en selfs skadelik vir vee raak.
- ▶ Ons het 'n draadkophouer met 'n dak ontwerp om koppe veilig van die grond af te lig en ventilasie te verbeter.
- ▶ Ons moet boere opvoed oor die risiko's en gevare van diefstal, bederf en mikotoksienbesmetting, en die bestuur van graan.
- ▶ Dit is omslagtig om 'n groter oes met die hand skoon te maak. Vyf klein dieselaangedrewe dorsmasjiene is gekoop, maar nog is nodig.

2. Graan SA-projek: "Beyond Abundance"

Met geen befondsing buiten die beplande vyfjaarprojek uit die Jobs Fund nie, sou die projek moes sluit, maar die veldtog deur boere om voort te gaan om beter te boer en te bou op wat hulle geleer het, het gelei tot 'n nuwe projek: "BEYOND ABUNDANCE".

Dit is ons inspirasie:

- ▶ Boere het resultate behaal, ten spyte van uitdagende toestande soos droogtes en plaë.
- ▶ Boere is opgewonde oor die nuwe moontlikhede wat hulle boerdery hulle bied.
- ▶ Boere het reeds hulle swaarverdiende geld vir 'n nuwe seisoen weg gesit.
- ▶ Boere het dit duidelik gemaak dat hulle saam met Graan SA se Landbou-ontwikkelingsprogram die toekoms wil ingaan.

Met 'n wêreldwye fokus op die 17 doelwitte vir 'n beter wêreld teen 2030 sou dit onverantwoordelik van ons wees om hierdie geleentheid, wat die potensiaal het om kwessies soos dié hieronder te hanteer, te laat verbygaan: Geen armoede nie, geen honger nie, goeie gesondheid en welstand.

VOORUITSKOUING

Die projek "BEYOND ABUNDANCE" is in Oktober 2019 bekend gestel. Geprojekteerde deelname aan die projek was soos volg:

SEISOEN	2019/2020	2020/2021	2021/2022
Getal boere	5 500	6 050	6 655
Getal hektaar	7 500	8 250	9 075

- ▶ Farmer's contribution: R3 500 per ha (of the direct cost of the lime, seed, fertiliser, agro-chemicals and repairs to equipment).
- ▶ Industry role-players would be requested for discounts on inputs (i.e a cash discount of 13,75% as before).
 - ▶ Monsanto – seed and Roundup
 - ▶ Kynoch – fertiliser and top dressing including transport
 - ▶ SA Lime and Gypsum – lime
 - ▶ Villa Crop – chemicals: Insecticide and herbicide

PROJECT INVOLVEMENT ON 1 OCTOBER 2019

At the time of project roll out for optimum performance the committed project role-players were:

- ▶ Grain SA Farmer Development team.
- ▶ Industry role-players who had committed to input discounts: Bayer (seed), Kynoch (fertiliser) and Villa Crop (chemicals).
- ▶ 4 999 farmers who had already deposited their R3 500 per ha in the TPFA account by 1/10/2019.

REGIONAL OFFICE	FARMERS INVOLVED
Dundee	652
Kokstad	1 203
Louwsburg	655
Maclear	233
Mthatha	1 858
Nelspruit	398

PROJECT STATUS QUO AS AT OCTOBER 2019

Limitations

- ▶ No funding for mentoring
- ▶ No funding for liming

Actions taken

Farmers each took delivery of inputs which Grain SA co-ordinated:

- ▶ 1 x 10 kg seed
- ▶ 3 x 50 kg bags 4:3:4 (40) planting fertiliser
- ▶ 2 x 50 kg bags 1:0:0 (40) top dressing fertiliser
- ▶ 1 pack chemicals

Logistics

- ▶ All deliveries to the study groups were co-ordinated by operations manager, Dr Willie Kotze.
- ▶ In the absence of mentors, regional managers managed deliveries but farmers were fully responsible for collection.

Challenges

- ▶ To source the balance of the input costs e.g. from government departments; private sector.
- ▶ To source funding for mentoring for eight months. Each mentor should ideally be responsible for 50 farmers.

The ripple effect: One successful project leads to another

It is often the case that one successful project such as the From Subsistence to Abundance project draws attention and inspires other stakeholders to invest in Grain SA Farmer Development initiatives.

Example 1: Bayer sponsored tools to aid farmers in shelling the cobs.

Example 2: The DST sponsored training on mycotoxins and the safe storage of grain.

3. Grain SA partners with the Department of Science and Innovation

This project was triggered by the successes of project: From Subsistence to Abundance. The snowball effect of farmers learning to do the right thing, using good inputs and enjoying mentorship throughout the season saw increased yields posing new challenges for farmers. Bigger yields meant maize had to be stored safely; hand harvesting required more time and energy.

- ▶ Boer se bydrae: R3 500 per ha ('n deel van die regstreekse koste van die kalk, saad, kunsmis, landbouchemikalieë en herstelwerk aan toerusting).
- ▶ Bedryfsrolspelers sal gevra word vir afslag op insette (met ander woorde kontantafslag van 13,75% soos voorheen).
 - ▶ Monsanto – saad en Roundup
 - ▶ Kynoch – kunsmis en topbemesting, met vervoer ingesluit
 - ▶ SA Kalk en Gips – kalk
 - ▶ Villa Crop – chemikalieë: Insekdoder en onkruidodder

PROJEKBETROKKENHEID OP 1 OKTOBER 2019

Ten tyde van die projek se bekendstelling vir optimale prestasie was die bevestigde projekrolspelers soos volg:

- ▶ Graan SA se Landbou-ontwikkelingspan.
- ▶ Bedryfsrolspelers wat hulle tot insetafslag verbind het: Bayer (saad), Kynoch (kunsmis) en Villa Crop (chemikalieë).
- ▶ 4 999 boere wat reeds teen 1/10/2019 hulle R3 500 per ha in die TPFA-rekening gedeponeer het.

STREEKSKANTOOR	BOERE BETROKKE
Dundee	652
Kokstad	1 203
Louwsburg	655
Maclear	233
Mthatha	1 858
Nelspruit	398

PROJEK SE STATUS QUO SOOS IN OKTOBER 2019

Beperkinge

- ▶ Geen befondsing vir mentorskap nie
- ▶ Geen befondsing vir bekalking nie

Stappe gedoen

Insette wat deur Graan SA gekoördineer is, is by boere afgelewer:

- ▶ 1 x 10 kg saad
- ▶ 3 x 50 kg-sakke 4:3:4 (40) plantkunsmis
- ▶ 2 x 50 kg-sakke 1:0:0 (40) topbemestingskunsmis
- ▶ 1 pak chemikalieë

Logistiek

- ▶ Alle aflewings aan die studiegroepe is deur die bedryfsbestuurder, dr Willie Kotze, gekoördineer.
- ▶ By gebrek aan mentors het streeksbestuurders aflewings bestuur, maar boere was ten volle verantwoordelik om dit af te haal.

Uitdagings

- ▶ Om die balans van die insetkoste te kry, byvoorbeeld van regerings-departemente en die privaat sektor.
- ▶ Om fondse vir mentorskap vir agt maande te verkry. Elke mentor moet ideaal-gesproke vir 50 boere verantwoordelik wees.

Die rimpel-effek: Een suksesvolle projek lei tot die volgende een

Dit gebeur dikwels dat een suksesvolle projek soos "From Subsistence to Abundance" aandag trek en ander belanghebbendes inspireer om in Graan SA se Landbou-ontwikkelingsinisiatiewe te belê.

Voorbeeld 1: Bayer het gereedskap geborg om boere te help om die koppe skoon te maak.

Voorbeeld 2: Die DWI-geborgde opleiding oor mikotoksiene en die veilige opberging van graan.

3. Graan SA in vennootskap met die Departement van Wetenskap en Innovasie

Die sukses wat met projek "From Subsistence to Abundance" behaal is, het tot hierdie projek aanleiding gegee. Die sneeubaleffek van boere wat leer om die regte ding met behulp van goeie insette te doen, en die mentorskap wat hulle regdeur die seisoen ontvang het, het daartoe gelei dat groter opbrengste vir die boere nuwe uitdagings gebied het. Groter opbrengste het beteken dat mielies veilig opgeberg moes word, en oes met die hand het meer tyd en energie geverg.

WHAT HAS BEEN ACHIEVED?

- 1) 95 courses on safe storage and mycotoxins were held; 1 721 farmers attended.
- 2) Cob cages for safer storage: 398 cob cages, were distributed to farmers.
- 3) 70 small, easily transported, diesel powered threshing machines were acquired and distributed to areas where farmers were struggling to finish harvesting.
- 4) Scales and bag stitchers were bought and enabled farmers to weigh bags to market.
- 5) Courses to promote grain farming towards food security and to teach farmers about household nutritional security were designed:
 1. Nutrition: Different food groups: 44 courses were presented to 847 farmers.
 2. Training on the nixtamalization of maize: 220 courses were delivered to 2 806 farmers.

This is pioneering work being done by Grain SA Farmer Development. This 'cooking' process originates from Mexico and refers to a method of preparing maize and other grains by soaking the grain and cooking it in an alkaline solution, usually lime water. The motivation is this process is known to remove 97% to 100% of the aflatoxins in the grain from mycotoxin-contaminated corn. Nixtamalized maize has several benefits over unprocessed grain: It is more easily ground; nutritional value is increased; flavour and aroma are improved; and mycotoxins are reduced.

- 6) The Dry beans Project: 79 courses on the production and nutritional benefits of dry beans were given to 1 139 farmers. Farmers need training on bean production, the value of beans in the crop rotation cycle, and the value of beans as a source of protein.
- 7) Fast tracking knowledge-sharing using modern technology. The Department of Science and Innovation funded the production of five DVD's in a series entitled Road to Growth.
 - 1 – Feed your soil
 - 2 – Control plant diseases
 - 3 – Control pests in your crops
 - 4 – Weed control – eliminate competition
 - 5 – Chemical weed control

The clips are available on Grain SA's YouTube channel.

4. Farmer Development's collaboration with AB InBev

This project is designed to provide loans which enable farmers with production finance. All participating farmers made an own contribution and AB InBev loaned R5 000 per ha for inputs. The 2019 budget for the project was R10 992 850.

Three Farmer Development offices were involved with 34 participating farmers.

- The project plan was to plant 1 738 hectares.
- Early drought hampered project progress and some farmers were unable to plant as planned.
- 1 371 ha was planted.
- Bean and sunflower yields were disappointing.
- The 2018/2019 season was not a reflection on farmers or on their capabilities.

WAT IS BEREIK?

- 1) 'n Totaal van 95 kursusse oor veilige opberging en mikotoksiene is aangebied, en 1 721 boere het dit bygewoon.
- 2) Kophokke vir veilige opberging: 398 kophokke is aan boere verskaf.
- 3) 70 klein dieselaangedrewe dorsmasjiene wat maklik vervoer kan word, is aangeskaf en versprei in gebiede waar boere gesukkel het om klaar te oes.
- 4) Skale en sakstikmasjiene is gekoop en het boere in staat gestel om sakke te weeg om te bemark.
- 5) Kursusse om graanboerdery vir voedselsekerheid te bevorder en om boere van huishoudelike voedingsekerheid te leer, is ontwerp:
 1. Voeding: verskillende voedselgroepe: 44 kursusse is vir 847 boere aangebied.
 2. Opleiding oor die nixtamalisering van mielies: 220 kursusse is vir 2 806 boere aangebied.

Dit is baanbrekerswerk wat deur Graan SA Landbou-ontwikkeling gedoen word. Hierdie "kookproses" kom uit Mexiko en verwys na 'n metode om mielies en ander graan voor te berei deur die graan in 'n alkaliese oplossing, gewoonlik kalkwater, te week en te kook. Die motivering is dat hierdie proses 97% tot 100% van die aflatoxine in die graan en uit mikotoksien-besmette mielies verwyder. Genikstamaliseerde mielies het verskeie voordele bō onverwerkte graan: Dit is makliker om te maal, het groter voedingswaarde, die smaak en geur is beter, en mikotoksiene is verminder.

- 6) Die Droëboneprojek: 79 kursusse oor die produksie en voedingsvoordele van droëbone is vir 1 139 boere aangebied. Boere benodig opleiding oor die produksie van bone, die waarde van bone in die gewasrotasiesiklus, en die waarde van bone as 'n bron van proteïen.
- 7) Versnelde deel van kennis met behulp van moderne tegnologie. Die Departement Wetenskap en Innovasie het die produksie van vyf DVD's in 'n reeks getiteld "Road to Growth" befonds.
 - 1 – Feed your soil
 - 2 – Control plant diseases
 - 3 – Control pests in your crops
 - 4 – Weed control – eliminate competition
 - 5 – Chemical weed control

Die video's is op Graan SA se YouTube-kanaal beskikbaar.

4. Landbou-ontwikkeling se samewerking met AB InBev

Hierdie projek is ontwerp om lenings te verskaf wat boere met produksiefinansiering bemagtig. Alle deelnemende boere het self 'n bydrae gemaak en AB InBev het R5 000 per ha vir insette geleen. Die 2019-begroting vir die projek was R10 992 850.

Drie Landbou-ontwikkelingskantore was betrokke, met 34 boere wat deelgeneem het.

- Die projekplan was om 1 738 hektaar aan te plant.
- Vroeë droogte het die vordering van die projek gekniehalter, en sommige boere kon nie plant soos wat beplan was nie.
- 1 371 ha is aangeplant.
- Bone- en sonneblompoging was teleurstellend.
- Die 2018/2019-seisoen was nie 'n weerspieëling van die boere of hulle vermoëns nie.

CROP GEWAS	HA (2018/2019)	TONS HARVESTED (2018/2019) TON GEOES (2018/2019)	AVERAGE YIELD (t/ha) GEMIDDELDE OPBRENGS (t/ha)
Dry beans/Droëbone	234	197	0,84
Maize/Mielies	581	1 909	3,29
Sunflowers/Sonneblom	556	319	0,57

LOOKING TO THE FUTURE WITH AB INBEV

- ▶ This project continues and we are hopeful for better results.
- ▶ By 30 September 86 farmers had made a commitment to participate in 2019/2020.

5. Zamukhele small white bean project with Schoeman Boerdery

The project aimed to help farmers plant crops suited to their region, other than the traditional maize and sunflower crops.

- ▶ Schoeman Boerdery supplied PAN 123 and Teebus to farmers on a delayed payment agreement.
- ▶ Agron fertiliser company supplied fertiliser on a delayed payment agreement.
- ▶ Schoeman Boerdery appointed a mentor to support farmers.
- ▶ Villa Crop assisted with chemicals.
- ▶ Farmers supplied own diesel, equipment and covered remaining expenses.
- ▶ Farmers signed an agreement to deliver the crop to Schoeman Boerdery.

18 farmers participated in the project.

6. Mechanisation in the Eastern Cape with DRDAR

The DRDAR and Grain SA have had a service level agreement (SLA) for two years now. The purpose of the SLA is to assist farmers and develop black agricultural contractors. The agreement included a programme to train unemployed graduates by employing them as interns and Grain SA would assist in equipping them to serve the agricultural sector in the Eastern Cape.

PROJECT 2018/2019

- ▶ Grain SA would facilitate planting 4 056 hectares at R3 200 per ha.
- ▶ 17 unemployed graduates would be mentored as interns.
- ▶ Total hectares to be worked by contractors in 2018/2019: 4 056 ha + 445 ha = 4 501 ha.

HECTARES UNDER PRODUCTION IN EASTERN CAPE IN THIS PROJECT

- ▶ Drought impacted plantings resulting in fewer ha being planted.
- ▶ The hectares allocated to contractors were eventually 4 439 ha.

DIE TOEKOMS IN SAAM MET AB INBEV

- ▶ Hierdie projek gaan voort en ons hoop op beter resultate.
- ▶ Teen 30 September het 86 boere hulle verbind om in 2019/2020 deel te neem.

5. Zamukhele klein witboneprojek saam met Schoeman Boerdery

Die doel van die projek was om boere te help om gewasse te plant wat vir hulle streek geskik is, buiten die tradisionele mielies en sonneblom.

- ▶ Schoeman Boerdery het PAN 123 en Teebus met 'n uitgesteldebetalingsooreenkoms aan boere verskaf.
- ▶ Die Agron-kunsmismaatskappy het kunsmis met 'n uitgesteldebetalingsooreenkoms verskaf.
- ▶ Schoeman Boerdery het 'n mentor aangestel om boere te ondersteun.
- ▶ Villa Crop het chemikalieë verskaf.
- ▶ Boere het hulle eie diesel en toerusting verskaf en die oorblywende uitgawes gedek.
- ▶ Boere het 'n ooreenkoms onderteken om die oes aan Schoeman Boerdery te lewer.

18 boere het aan die projek deelgeneem.

6. Meganisasie in die Oos-Kaap saam met die DRDAR

Die DRDAR en Graan SA het reeds die afgelope twee jaar 'n diensvlakooreenkoms. Die doel van die ooreenkoms is om boere te ondersteun en swart landboukontrakteurs te ontwikkel. Die ooreenkoms het 'n program ingesluit om werklose gegradueerdes op te lei deur hulle as interns aan te stel, en Graan SA het gehelp om hulle toe te rus om die landbousektor in die Oos-Kaap te bedien.

PROJEK 2018/2019

- ▶ Graan SA sou die aanplanting van 4 056 teen R3 200 per ha befonds.
- ▶ 17 werklose gegradueerdes sou as interns gementor word.
- ▶ Die totale getal hektaar wat in 2018/2019 deur kontrakteurs bewerk sou word: 4 056 ha + 445 ha = 4 501 ha.

HEKTAAR ONDER PRODUKSIE IN DIE OOS-KAAP IN HIERDIE PROJEK

- ▶ Die impak van die droogte op die aanplantings het daartoe gelei dat minder hektaar aangeplant is.
- ▶ Daar is uiteindelik 4 439 ha aan kontrakteurs toegewys.



At consecutive AgriSeta Annual Awards Events in 2018 and 2019, the Grain SA Farmer Development division was acknowledged for excellence in the field of farmer development.

Die Graan SA Landbou-ontwikkelingsafdeling het by twee agtereenvolgende AgriSeta jaarlikse toekenningsgeleenthede in 2018 en 2019 erkenning vir uitnemendheid op die gebied van landbou-ontwikkeling ontvang.

17 INTERNSHIPS WITH GRAIN SA

- ▶ Seven interns worked in the field from the Kokstad Regional Development office.
- ▶ Ten interns worked in the field from the Mthatha Regional Development office.

Interns learned practical tasks and then taught farmers how to perform:

- ▶ Planter calibrations
- ▶ Boom sprayer calibrations
- ▶ Mapping of land using GPS
- ▶ Farm equipment maintenance
- ▶ Crop yield estimates

Interns participated in training courses and assisted trainers with theory and practical lessons.

For everything under the sun there is a season: A time to celebrate

Development is not an easy road. But once a year we take a moment at our Day of Celebration to commemorate:

- ▶ Farmers who have grown their farming enterprises.
- ▶ A team that works with dedicated passion.
- ▶ Farmers who become role-models for future farmers.
- ▶ Successful knowledge transfer and skills development.
- ▶ Friends of Grain SA who go beyond the call of duty because they believe in the work we do.

This year it was held at NAMPO Park on 2 October 2019 – a colourful, joyous event shared with many farmers and stakeholders. The annual Farmer of the Year competition is held with a view to identifying achievers and celebrating with them. The four categories in 2019 were:

Subsistence Farmer of the Year: Eleven nominees
Winner: Mazonya Dhlamini – Amersfoort
Mentor: Jurie Mentz

Smallholder Farmer of the Year: Ten nominees
Winner: Mdumiseni Welcome Hadebe – Estcourt region
Mentor: Rob Irons with Graeme Engelbrecht

Potential Commercial Farmer of the Year: Two nominees
Winner: Sabatha Mthethwa – Dannhauser
Mentor: Graeme Engelbrecht

Commercial Farmer of the Year: Five nominees
Winner: Andries van der Poll – Moorreesburg
Mentor: Liana Stroebe

The 250 Ton Club is another way we celebrate progress as farmers deliver bigger yields than ever before. Farmers who have achieved club membership in the following categories to date are as follows:

- ▶ 250 Ton Club – 75
- ▶ 500 Ton Club – 57
- ▶ 1 000 Ton Club – 18
- ▶ 1 500 Ton Club – 12

NEW CLUB MEMBERS

500 Ton Club – 1) Mapota Paulus Mosia; 2) Andile Ndzunga
1 000 Ton Club – 1) Solomon Masango; 2) the Mthethwa Family trading as Fit and Proper Trading.

There was a heart-warming moment of spontaneity when farmers called for their managers to step on the stage so they could cheer and thank them! One has to feel proud when a farmer like our Grain SA/Absa/John Deere Financial New Era Commercial Farmer of the Year, Andries van der Poll, thanks Grain SA for their guidance and enabling him to live his dream.

We are making a difference!

17 INTERNSKAPPE BY GRAAN SA

- ▶ Sewe interns het uit die Kokstad-streeksontwikkelingskantoor in die veld gewerk.
- ▶ Tien interns het uit die Mthatha-streeksontwikkelingskantoor in die veld gewerk.

Die interns het praktiese take geleer en daarna boere geleer hoe om die volgende te doen:

- ▶ Planterkalibrering
- ▶ Balkspuitkalibrering
- ▶ Kartering van grond met behulp van GPS
- ▶ Instandhouding van plaastoerusting
- ▶ Oesopbrengsskatting

Die interns het aan opleidingskursusse deelgeneem en opleiers met teoretiese en praktiese lesse gehelp.

'n Seisoen vir alles onder die son: 'n Tyd om te vier

Ontwikkeling is nie 'n maklike pad nie. Een keer per jaar vier ons egter die volgende tydens ons Dag van Feesviering:

- ▶ Boere wat hulle boerdery-ondernemings laat groei het.
- ▶ 'n Span wat met toegewyde passie werk.
- ▶ Boere wat rolmodelle vir toekomstige boere geword het.
- ▶ Suksesvolle kennisoordrag en vaardigheidsontwikkeling.
- ▶ Vriende van Graan SA wat meer as hulle plig doen omdat hulle glo in die werk wat ons doen.

Hierdie jaar is die Dag van Feesviering op 2 Oktober 2019 by NAMPO Park gehou – 'n kleurvolle, vreugdevolle geleentheid wat deur talle boere en belanghebbendes gedeel is. Die jaarlikse Boer van die Jaar-kompetisie is gehou ten einde presteerders te identifiseer en saam met hulle te vier. Die vier kategorieë vir 2019 was:

Bestaansboer van die Jaar: Elf benoemdes
Wenner: Mazonya Dhlamini – Amersfoort
Mentor: Jurie Mentz

Kleinskaalse Boer van die Jaar: Tien benoemdes
Wenner: Mdumiseni Welcome Hadebe – Estcourt-streek
Mentor: Rob Irons saam met Graeme Engelbrecht

Potensiële Kommersiële Boer van die Jaar: Twee benoemdes
Wenner: Sabatha Mthethwa – Dannhauser
Mentor: Graeme Engelbrecht

Kommersiële Boer van die Jaar: Vyf benoemdes
Wenner: Andries van der Poll – Moorreesburg
Mentor: Liana Stroebe

Die 250 Ton-klub is nog 'n manier om vordering te vier wanneer boere groter opbrengste as ooit tevore produseer. Boere wat tot op hede klublidmaatskap in die kategorieë hieronder verwerf het, is die volgende:

- ▶ 250 Ton-klub – 75
- ▶ 500 Ton-klub – 57
- ▶ 1 000 Ton-klub – 18
- ▶ 1 500 Ton-klub – 12

NUWE KLUBLEDE

500 Ton-klub – 1) Mapota Paulus Mosia; 2) Andile Ndzunga
1 000 Ton-klub – 1) Solomon Masango; 2) die Mthethwa-familie, wat as Fit and Proper Trading handel dryf.

Daar was 'n wonderlike oomblik van spontaneïteit toe die boere hulle ontwikkelingsbestuurders gevra het om op die verhoog te staan sodat hulle hulle kon toejuig en bedank! 'n Mens moet trots voel wanneer 'n produsent soos ons Graan SA/Absa/John Deere Finansiële Nuwe Era Kommersiële Boer van die Jaar, Andries van der Poll, Graan SA bedank vir hulle leiding en dat hulle hom in staat gestel het om sy droom uit te leef.

Ons maak 'n verskil!

Corporate Services Korporatiewe Dienste

Offering support to all levels within Grain SA

CONGRESS, EXECUTIVE AND MANAGEMENT COMMITTEE

Annual Congress

The annual Congress took place at NAMPO Park on 6 and 7 March 2019. The Congress was constituted, with a total of 376 delegates, representing 32 regions.

The Congress theme focused on 'A critical reflection for a new footprint.'

The following themes were discussed by delegates:

- ▶ Malcolm Ferguson (Retired Ambassador; represented South Africa in various countries): The political and economic policy environment in South and Southern Africa.
- ▶ Werner Rossouw (Silostrat): Hedging your grain price: Ten lessons learned.
- ▶ Motivational speakers – Alex van den Heever and Renias Mhlongo (two rangers).

Group discussions after all the sessions were led by Jannie de Villiers, Chief Executive Officer of Grain SA.

Round table discussions took place with delegates from the various regions, with interaction and participation in question sessions.



The main table: Preline Swart (Vice-chairperson), Nico Vermaak (Manager: Corporate Services), Jaco Minnaar (Chairperson), Jannie de Villiers (Chief Executive Officer) and Derek Mathews (Vice-chairperson).

Die hooftafel: Preline Swart (Visevoorsitter), Nico Vermaak (Bestuurder: Korporatiewe Dienste), Jaco Minnaar (Voorsitter), Jannie de Villiers (Uitvoerende Hoofbestuurder) en Derek Mathews (Visevoorsitter).



Malcolm Ferguson



Werner Rossouw



Renias Mhlongo and/en Alex van den Heever

Steun gebied op alle vlakke in Graan SA

KONGRES, HOOFBESTUUR EN DAGBESTUUR

Jaarlikse Kongres

Die jaarlikse Kongres het op 6 en 7 Maart 2019 by NAMPO Park plaasgevind. Die Kongres is gekonstitueer met 'n totaal van 376 afgevaardigdes, wat 32 streke verteenwoordig het.

Die Kongrestema het op "'n Kritiese refleksie vir 'n nuwe voetspoor" gefokus.

Die afgevaardigdes het die volgende temas bespreek:

- ▶ Malcolm Ferguson (Afgetrede ambassadeur; verteenwoordig Suid-Afrika in verskeie lande): Die politieke en ekonomiese omgewing in Suid- en Suidelike Afrika.
- ▶ Werner Rossouw (Silostrat): Verskansing van graanpryse: Tien lesse geleer.
- ▶ Motiveringsprekers – Alex van den Heever en Renias Mhlongo (twee wildbewaarders).

Groepbesprekings ná al die sessies is deur Jannie de Villiers, Uitvoerende Hoofbestuurder van Graan SA, gelei.

Rondetafelgesprekke het plaasgevind met afgevaardigdes uit die onderskeie streke, met interaksie en deelname aan vraesessies.

Erkenning aan rolspelers in die graanwaardeketting

Tydens die Kongres is erkenning gegee aan:

- ▶ Verskeie entiteite vir diens aan die landboubedryf in Suid-Afrika oor die afgelope eeu:
 - ▶▶ BKB
 - ▶▶ Landbouweekblad
 - ▶▶ OVK
 - ▶▶ Overberg Agri
 - ▶▶ Santam Landbou
 - ▶▶ VKB
- ▶ Die volgende instellings het erkenning ontvang vir 110 jaar se diens aan die landboubedryf:
 - ▶▶ NWK
 - ▶▶ Senwes
 - ▶▶ Suidwes
- ▶ Die volgende rolspelers in die bedryf:
 - ▶▶ SIQ en GTI vir dienste in belang van die graan- en oliesadebedryf,



Coretha Usher
HUMAN RESOURCES OFFICER
MENSEHULPBRONNEBEAMPTER



Clarissa Chinian
RECEPTIONIST
ONTVANGSKLERK



Nico Vermaak
MANAGER: CORPORATE SERVICES
BESTUURDER: KORPORATIEWE DIENSTE



Elda-Beth van den Berg
SECRETARY
SEKRETAARSESSE



Eva Lehabe
OFFICE CLERK/MESSENGER
KANTOORKLERK/BODE



Louisa Mohlala
CLEANER
SKOONMAKER

Recognition to role-players in the grain value chain

During Congress recognition was given to:

- ▶ Various entities for service to the agricultural industry in South Africa over the past century:
 - ▶▶ BKB
 - ▶▶ Landbouweekblad
 - ▶▶ OVK
 - ▶▶ Overberg Agri
 - ▶▶ Santam Agriculture
 - ▶▶ VKB
- ▶ The following institutions was recognised for 110 years of service to the agricultural industry:
 - ▶▶ NWK
 - ▶▶ Senwes
 - ▶▶ Suidwes
- ▶ The following industry role-players:
 - ▶▶ SIQ and GTI for services in the interests of the grain and oilseeds industry, with exceptional contributions to ensure high quality data for accurate crop estimates.
 - ▶▶ Infoworks for 18 years of exceptional service to Grain SA.
- ▶ The following Grain Producers of the Year:
 - ▶▶ 2018 New Era Commercial Producer of the Year: Jeremia Mathebula, Amersfoort, Mpumalanga.
 - ▶▶ 2018 Subsistence Farmer of the Year: Jenette Thembi Shoba from Gert Sibande District Municipality in Mpumalanga.
 - ▶▶ 2018 Smallholder Farmer of the Year: Nhlanhla Sicelo Mngadi from Kwa-Dlamini, Estcourt, KwaZulu-Natal.
 - ▶▶ 2018 Potential Commercial Farmer of the Year: Paulus Mosia of Edenville, Free State.
 - ▶▶ 2018 Grain Producer of the Year: Van As Brothers (Johan and Dirkie) from Swellendam.
- ▶ The Maize Breakaway Session: Dr Tom Drinkwater:
 - ▶▶ Recognition was given to Dr Tom Drinkwater from the ARC-Grain Crops during the Maize Breakaway Session for his lifelong contribution to the grain industry.

Attendance by guests and media

Support by the media and attendance by large numbers of guests and senior government officials were indicative that the Grain SA Congress

met buitengewone bydraes om hoëgehalte data vir akkurate oëskattings te verseker.

- ▶▶ Infoworks vir 18 jaar se buitengewone diens aan Graan SA.
- ▶ Die volgende Graanprodusente van die Jaar:
 - ▶▶ 2018 Nuwe Era Kommersiële Produsent van die Jaar: Jeremia Mathebula, Amersfoort, Mpumalanga.
 - ▶▶ 2018 Bestaansboer van die Jaar: Jenette Thembi Shoba van Gert Sibande Distriksmunisipaliteit, Mpumalanga.
 - ▶▶ 2018 Kleinskaalse Boer van die Jaar: Nhlanhla Sicelo Mngadi van Kwa-Dlamini, Estcourt, KwaZulu-Natal.
 - ▶▶ 2018 Potensiële Kommersiële Boer van die Jaar: Paulus Mosia van Edenville, Vrystaat.
 - ▶▶ 2018 Graanprodusent van die Jaar: Van As Broers (Johan en Dirkie) van Swellendam.
- ▶ Die Mieliewegbreesessie: dr Tom Drinkwater:
 - ▶▶ Tydens die Mieliewegbreesessie het dr Tom Drinkwater van die LNR-Graangewasse erkenning ontvang vir sy lewenslange bydrae tot die graanbedryf.

Bywoning deur gaste en media

Steun van die nuusmedia en bywoning deur groot getalle gaste en senior regeringsamptenare het aangedui dat die Graan SA Kongres as 'n hoogtepunt op die landboukalender beskou word. 'n Geraamde 550 persone het die Kongres by NAMPO Park bygewoon.

Hoofbestuur en Dagbestuur

Die Hoofbestuur is die hoogste gesag wanneer die Kongres nie in sitting is nie.

Graan SA se Dagbestuur bestaan uit verkose en gekoöpteerde verteenwoordigers van die onderskeie graanproduserende streke. Die Hoofbestuur het by vier geleenthede tydens die verslagdoeningstydperk vergader, naamlik op 5 Februarie, 7 Maart, 23 tot 24 Julie en 3 Oktober 2019.

'n Netwerk word met die graanwaardeketting gehandhaaf, met hoofbestuurslede wat in verskeie direksies, trusts, forums, tegniese komitees en ander eksterne entiteite dien. Dit word gedoen om te verseker dat die belange van graanprodusente op die hoogste vlak in die graanwaardeketting bevorder word.

Die Dagbestuur van die Hoofbestuur is ná die Kongres deur die Hoofbestuur gekies en bestaan uit die volgende lede:

is viewed as a highlight on the agricultural calendar. An estimated number of 550 persons attended the Congress at NAMPO Park.

Executive and Management Committee

The Executive is the highest authority when the Congress is not in session.

The Executive of Grain SA comprises of elected and co-opted representatives from the various grain production regions. The Executive convened on four occasions during the reporting period, i.e. 5 February, 7 March, 23 to 24 July and 3 October 2019.

A network with the grain value chain is maintained, with Executive members serving on several board of directors, trusts, forums, technical committees and other external entities. This is done to ensure that the interests of grain producers are promoted at the highest level within the grain value chain.

The Management Committee of the Executive was elected after Congress by the Executive and comprises the following members:

- ▶ Jaco Minnaar (Chairperson)
- ▶ Derek Mathews (Vice-chairperson)
- ▶ Ramodisa Monaisa (Vice-chairperson)
- ▶ Jaco Breytenbach
- ▶ Chris Schoonwinkel
- ▶ Richard Krige
- ▶ Jeremia Mathebula

The Management Committee focuses on policy, strategic planning, financial and staff related matters and also deals with delegated powers when the Executive is not in session. The Management Committee met on 22 January, 9 and 10 April, 12 June, 16 September and 24 October during 2019.

The Management Committee and the Management Team completed a strategic planning session in April 2019. The results of the planning session were approved by the Executive as the strategic focus areas of Grain SA, with the vision of sustainable grain production.

Grain SA bids farewell to retired Executive members

A farewell function for retired Executive members was held at NAMPO Park on 23 July 2019. The evening afforded the opportunity to retired Executive members to bid farewell to their colleagues and for Grain SA to show appreciation to these retired Executive members.

Recognition was given to:

- ▶ Anton Botha
- ▶ Bart Harmse

AWARD FOR EXCELLENCE

Recognition for excellence is awarded annually to an Executive member for excellent support and service within the Executive.

This year the award was given to Kallie Schoeman of Region 9.

GRAIN SA INFORMATION TECHNOLOGY

IT related networks, desktop support and IT security

The IT support and infrastructure services were managed by Hambisana.

OFFICE 365 AND ONE DRIVE

The migration to Office 365 has been completed, securing the server environment for Grain SA.

The agendas and annexures of the Executive were moved to One Drive to assist with a paperless environment.

Grain SA website (www.grainsa.co.za)

A data management system for the Farmer Development section to support interactive management inputs from the various regions and mentors is maintained.

The Grain SA website is maintained by Thoughtcorp.

- ▶ Jaco Minnaar (Voorsitter)
- ▶ Derek Mathews (Visevoorsitter)
- ▶ Ramodisa Monaisa (Visevoorsitter)
- ▶ Jaco Breytenbach
- ▶ Chris Schoonwinkel
- ▶ Richard Krige
- ▶ Jeremia Mathebula

Die Dagbestuur fokus op beleid, strategiese beplanning, finansiële en personeelverwante sake, en hanteer ook gedelegeerde magte wanneer die Hoofbestuur nie in sitting is nie. Die Dagbestuur het in 2019 op 22 Januarie, 9 en 10 April, 12 Junie, 16 September en 24 Oktober vergader.

Die Dagbestuur en die Bestuursplan het in April 2019 'n strategiese beplanningssessie gehou. Die resultate van die beplanningssessie is deur die Hoofbestuur as die strategiese fokusareas van Graan SA, met die visie van volhoubare graanproduksie, goedgekeur.

Graan SA groet uitgetrede Hoofbestuurslede

'n Afskeidsfunksie vir uitgetrede Hoofbestuurslede is op 23 Julie 2019 by NAMPO Park gehou. Die aand het uitgetrede Hoofbestuurslede die kans gegee om hulle kollegas te groet, en aan Graan SA om sy waardering aan hierdie uitgetrede Hoofbestuurslede te betoon.

Erkenning is gegee aan:

- ▶ Anton Botha
- ▶ Bart Harmse

TOEKENNING VIR UITNEMENDHEID

Erkenning vir uitnemendheid word jaarliks gegee aan 'n Hoofbestuurslid wat uitstekende ondersteuning en diens in die Hoofbestuur gelewer het.

Hierdie jaar het die toekenning aan Kallie Schoeman van Streek 9 gegaan.



Kallie Schoeman (right) received an award for excellence as a member of the Executive this year. He is a member of the Executive since 2012.

Kallie Schoeman (regs) het vanjaar 'n erkenning vir uitnemendheid as Hoofbestuurslid ontvang. Hy dien sedert 2012 op die Hoofbestuur.

GRAAN SA INLIGTINGSTEKNOLOGIE

IT-verwante netwerke, lessenaarondersteuning en IT-sekureit

Die IT-ondersteuning en infrastruktuurdienste is deur Hambisana bestuur.

OFFICE 365 EN ONE DRIVE

Die migrasie na Office 365 is afgehandel, en die bedieneromgewing vir Graan SA is beveilig.

Die agendas en bylaes van die Hoofbestuur is na One Drive geskuif om 'n omgewing met minder papier te bevorder.

Graan SA-webwerf (www.grainsa.co.za)

'n Databestuurstelsel vir die Landbou-ontwikkeling-afdeling om interaktiewe bestuursinsette van die onderskeie streke en mentors te ondersteun, word in stand gehou.

Die Graan SA-webwerf word deur Thoughtcorp in stand gehou.

STAFF GRAIN SA

Staff turnover

The staff turnover for the reporting period was two persons. The full staff corps comprises 69 persons at the Pretoria, NAMPO Park, Bloemfontein, Paarl, Ladybrand, Mthatha, Mbombela, Louwsburg, Lichtenburg, Kokstad and Dundee offices.

Skills development and training

A skills development plan was submitted to the AgriSETA for the period April 2018 to March 2019. Grain SA pursues the ongoing development and empowerment of all staff and various training opportunities and courses were offered to staff. A Skills Development Committee meets every quarter.

Employment equity

Grain SA complies with the statutory requirements for the submission of reports to the Department of Labour, as set out in the Employment Equity Act, no. 55 of 1998. An Employment Equity Committee meets every quarter.

Performance evaluation

The performance evaluation of all staff is completed on a six-monthly basis in consultation with departmental heads. The results are taken into account by the Remuneration Committee.

Pension fund

An evaluation for amendments to the pension fund scheme was completed. After membership consultation sessions, recommendations were referred to the Remuneration Committee for approval and implementation.

Human capital and training

Courses have been presented to staff, with the focus on both technical skills and soft skills training.

PARTNERSHIPS WITH FUNDERS OF GRAIN SA PROJECTS

Grain SA annually submits projects to the Maize Trust, Sorghum Trust, Winter Cereal Trust, the Oil and Protein Seeds Development Trust and the Sasol Agriculture Trust. Interim reports and annual reports are submitted to the respective trusts in terms of the policies and procedures of the trusts. Factual findings by external auditors of Grain SA (Ashton) are, where requested, submitted to support financial reporting.

Grain SA would like to express its gratitude to the Sasol Agriculture Trust, Winter Cereal Trust, Maize Trust, Sorghum Trust and Oil and Protein Seeds Development Trust for their continued support to various Grain SA projects.

CONSTITUTION TASK TEAM

Constitutional amendments were requested for:

- ▶ Weighted voting by Congress.
- ▶ Approval of financial statements by the Executive.
- ▶ Procedure to nominate and elect the Chairperson, Vice-chairperson and members of the Executive.
- ▶ Amendments to assist the restructuring process of Grain SA.

The Executive considered recommendations and referred it to the 2020 Congress for consideration and approval.

CONCLUSION

The Corporate Services Department offers support at various levels to the Executive, Management and the staff team.

PERSONEEL GRAAN SA

Personeelomset

Die personeelomset vir die verslagdoeningstydperk was twee persone. Die volle personeelkorps is 69 persone by die Pretoria-, NAMPO Park-, Bloemfontein-, Paarl-, Ladybrand-, Mthatha-, Mbombela-, Louwsburg-, Lichtenburg-, Kokstad- en Dundee-kantoor.

Vaardigheidsontwikkeling en opleiding

'n Vaardigheidsontwikkelingsplan vir die tydperk April 2018 tot Maart 2019 is by die AgriSETA ingedien. Graan SA streef die deurlopende ontwikkeling en bemagtiging van alle personeel na en verskillende opleidingsgeleenthede en kursusse is vir personeel aangebied. 'n Vaardigheidsontwikkelingskomitee vergader elke kwartaal.

Diensbillikheid

Graan SA voldoen aan die statutêre vereistes vir die indiening van verslae by die Departement van Arbeid, soos uiteengesit in die Wet op Diensbillikheid, nr. 55 van 1998. 'n Diensbillikheidskomitee vergader elke kwartaal.

Prestasie-evaluering

Die prestasie-evaluering van alle personeel word sesmaandeliks in oorleg met departementshoofde gedoen. Die resultate word deur die Vergoedingskomitee in ag geneem.

Pensioenfonds

'n Evaluering vir wysigings aan die pensioenfondsskema is afgehandel. Ná ledekonultasiesessies is aanbevelings vir goedkeuring en implementering na die Vergoedingskomitee verwys.

Mensekapitaal en opleiding

Kursusse is vir personeel aangebied, met die fokus op opleiding in tegniese sowel as sagte vaardighede.

VENNOOTSKAPPE MET BEFONDSERS VAN GRAAN SA-PROJEKTE

Graan SA lê jaarliks projekte aan die Mielietrust, Sorghumtrust, Wintergraantrust, die Olie- en Proteïensade-ontwikkelingstrust en die Sasol Landboutrust voor. Tussentydse verslae word ingevolge die beleide en prosedures van die trusts aan die onderskeie trusts voorgelê. Feitelike bevindings deur die eksterne ouditeure van Graan SA (Ashton) word, waar versoek, ingedien om finansiële verslagdoening te ondersteun.

Graan SA wil graag sy dank teenoor die Sasol Landboutrust, die Wintergraantrust, die Mielietrust, die Sorghumtrust en die Olie- en Proteïensade-ontwikkelingstrust uitspreek vir hulle deurlopende steun aan verskeie Graan SA-projekte.

GRONDWETTAAKSPAN

Grondwetlike wysigings is aangevra vir:

- ▶ Geweegde stemming by die Kongres.
- ▶ Goedkeuring van finansiële state deur die Hoofbestuur.
- ▶ Prosedure om die Voorsitter, Visevoorsitter en lede van die Hoofbestuur te benoem.
- ▶ Wysigings om met die herstruktureringproses van Graan SA te help.

Die Hoofbestuur het aanbevelings oorweeg en dit vir oorweging en goedkeuring na die 2020 Kongres verwys.

SLOT

Die Departement Korporatiewe Dienste verskaf steun op verskeie vlakke aan die Hoofbestuur, die Bestuur en die personeelspan.

Market overview for the 2018/2019 production season

Markoorsig vir die 2018/2019-produksieseisoen



Dr Dirk Strydom
MANAGER: GRAIN ECONOMY
AND MARKETING
BESTUURDER: GRAANEKONOMIE
EN BEMARKING



Luan van der Walt
AGRICULTURAL ECONOMIST
LANDBOU-EKONOM

Summer grains show decrease while winter grains excel

PRODUCTION CONDITIONS FOR SUMMER GRAINS AND WINTER GRAINS IN THE 2018/2019 SEASON

The 2018/2019 production season for summer grains was once again a very challenging one, with rain occurring later than normally in the biggest part of the country. This had a major negative impact on plantings and the production potential in the western parts of the country in particular. In the more eastern parts of the country the plantings were done more or less in time, but in the western regions (western Free State and North West) plantings realised much later than usual.

With regard to the area planted for most of the summer grains – compared to the 2017/2018 season – the 2018/2019 season showed a decrease, with only the area for white maize and sorghum being bigger for the 2018/2019 season. The change in the planted summer grain areas for the 2018/2019 season compared to the 2017/2018 season was as follows:

White maize	+2,4%
Yellow maize	-4,6%
Soybeans	-7,2%
Sunflower seed	-14,3%
Sorghum	-75,3%
Groundnuts	64,4%

In the Western Cape, which is the biggest winter grain-producing region, the 2018/2019 season was one of the better seasons in the past five years. The total wheat production in the Western Cape was 890 500 tons for the 2018/2019 season, which was 52% more than the production of 586 800 tons for the 2017/2018 season. A total of 503 350 ha of wheat were planted in the 2018/2019 season, with the total production reaching 1,86 million tons.

For the other winter grains (canola and barley) the 2018/2019 season was also a good production season. A total of 77 000 ha of canola were planted in the 2018/2019 season and the total production for the season was 104 500 tons. The barley area for the 2018/2019 season was 119 000 ha and the total production for the season amounted to 421 500 tons.

Maize

The total maize plantings for the 2018/2019 production season were 2,3 million ha – 183 000 ha (0,8%) lower than the planted area for

Afname in somergrane, maar wintergrane presteer

PRODUKSIETOESTANDE VIR SOMER- EN WINTERGRANE IN DIE 2018/2019-SEISOEN

Die 2018/2019-produksieseisoen vir somergrane was weer eens 'n baie uitdagende een met reën wat later as normaal in die grootste gedeeltes van die land geval het. Dit het veral in die westelike gedeeltes van die land 'n groot negatiewe impak op aanplantings en die produksiepotensiaal gehad. In die meer oostelike gedeeltes van die land kon die aanplantings relatief betyds realiseer, maar in die westelike gedeeltes (westelike Vrystaat en Noordwes) het aanplantings heelwat later as normaal plaasgevind.

Wat die meeste somergrane se oppervlakte aangeplant betref, was daar – gemeet teen die 2017/2018-seisoen – 'n afname in die 2018/2019-seisoen, met slegs die oppervlakte van witmielies en sorghum wat hoër was gedurende die 2018/2019-seisoen. Die verandering in die aangeplante somergraan-oppervlakte vir die 2018/2019-seisoen teenoor die 2017/2018-seisoen was soos volg:

Witmielies	+2,4%
Geelmielies	-4,6%
Sojabone	-7,2%
Sonneblomsaad	-14,3%
Sorghum	-75,3%
Grondbone	64,4%

In die Wes-Kaap, wat die grootste wintergraanproduserende streek is, was die 2018/2019-seisoen een van die beter seisoene in die afgelope vyf jaar. Die totale koringproduksie in die Wes-Kaap was 890 500 ton vir die 2018/2019-seisoen – wat 52% meer is as die 2017/2018-seisoen se produksie van 586 800 ton. 'n Totaal van 503 350 ha koring is gedurende die 2018/2019-seisoen aangeplant met die totale produksie wat 1,86 miljoen ton bereik het.

In terme van die ander wintergrane (kanola en gars) was die 2018/2019-seisoen ook 'n goeie produksieseisoen. 'n Totaal van 77 000 ha kanola is gedurende die 2018/2019-seisoen aangeplant en die totale produksie vir die seisoen was 104 500 ton. Die garsoppervlakte vir die 2018/2019-seisoen was 119 000 ha en die totale produksie vir die seisoen het 421 500 ton beloop.

Mielies

Die totale mielie-aanplantings vir die 2018/2019-produksieseisoen was 2,3 miljoen ha wat 183 000 ha (0,8%) minder is as die 2017/2018-seisoen

the 2017/2018 season. With a decrease of approximately 4,6%, yellow maize showed the biggest decrease in area planted compared to the previous season, while the area of white maize increased by approximately 2,4% for the season. **Graph 1** shows the total production of white and yellow maize, as well as the ratio between the white and yellow maize production from the 1990/1991 season up to the 2018/2019 season. It is clear that the production figures for white and yellow maize were once again close together in the 2018/2019 season, with the yellow maize production for the season at 50,5% of the total, and the white maize production for the season at 49,5%.

Soybeans

The 2018/2019 production for soybeans was challenging, with conditions in the biggest part of the country being mainly unfavourable for the production of soybeans. Soybean plantings were not optimal and the total area of 730 500 ha planted was 7,2% smaller than the area planted during the 2017/2018 season.

Total production for 2018/2019 was estimated at 1,17 million tons, which is 24% lower than the production for the previous season. The average yield for the 2018/2019 season was 1,6 t/ha, which is considerably lower than the 1,96 t/ha for the previous season, and also the average yield of 1,83 t/ha for the past five years. **Graph 2** (on page 58) shows the total area planted, production and the average yield of soybeans since the 1990/1991 season.

Sunflower seed

The area of 515 350 ha of sunflower seed planted during the 2018/2019 production season was approximately 14% smaller than that for the previous season. Production conditions for the season were challenging, and plantings could only take place later than usual, which meant that not all the planned hectares could be planted. Sunflower seed production for the 2018/2019 season was estimated at 680 940 tons, with an average yield of 1,32 t/ha. This was lower than the previous season's yield of 1,43 t/ha, but slightly higher than the average yield of 1,27 t/ha for the past five years. **Graph 3** (on page 58) shows the total area planted, production and the average yield of sunflower seed since the 1990/1991 season.

se aangeplante oppervlakte. Geelmielies het met ongeveer 4,6% die grootste afname in aangeplante oppervlakte teenoor die vorige seisoen getoon terwyl die witmielie-oppervlakte met sowat 2,4% vir die seisoen toegeneem het. **Grafiek 1** toon die totale produksie van wit- en geelmielies asook die verhouding tussen die wit- en geelmielieproduksie vanaf die 1990/1991-seisoen tot en met die 2018/2019-seisoen. Dit is duidelik dat die verhouding van produksie tussen wit- en geelmielies in die 2018/2019-seisoen weer baie naby aan mekaar was, met die geelmielieproduksie vir die seisoen wat 50,5% van die totaal uitmaak het terwyl die witmielieproduksie vir die seisoen 49,5% beloop het.

Sojabone

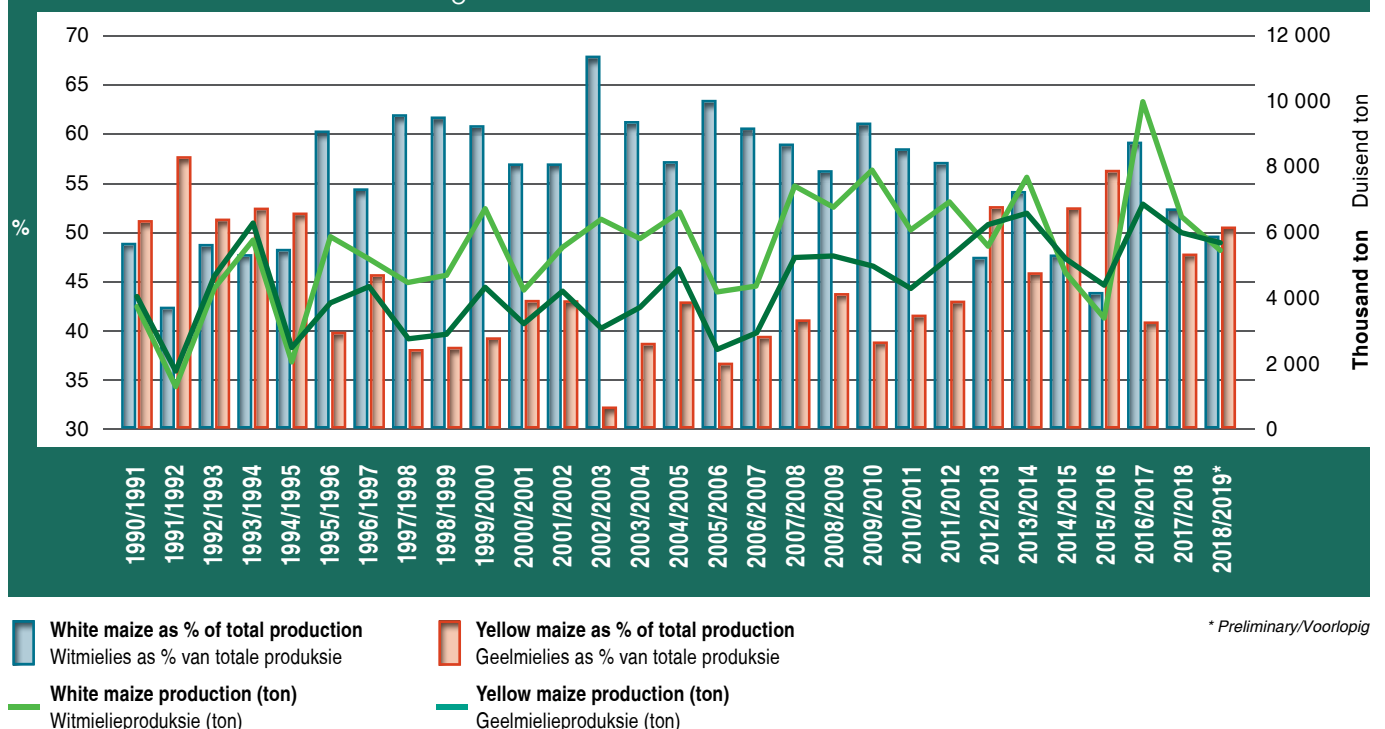
Die 2018/2019-produksieseisoen vir sojabone was uitdagend met omstandighede in die grootste gedeelte van die land wat meestal ongunstig was vir die produksie van sojabone. Sojaboon-aanplantings kon nie optimaal plaasvind nie en die totale oppervlakte van 730 500 ha was 7,2% laer as die oppervlakte wat gedurende die 2017/2018-seisoen aangeplant is.

Produksie vir 2018/2019 word in totaliteit op 1,17 miljoen ton geskat; wat 24% laer is as die vorige seisoen se produksie. Die gemiddelde opbrengs vir die 2018/2019-seisoen was 1,6 t/ha wat aansienlik laer is as die vorige seisoen se 1,96 t/ha en ook die afgelope vyf jaar se gemiddelde opbrengs van 1,83 t/ha. **Grafiek 2** (op bladsy 58) toon die totale aangeplante oppervlakte, produksie en gemiddelde opbrengs van sojabone sedert die 1990/1991-seisoen.

Sonneblomsaad

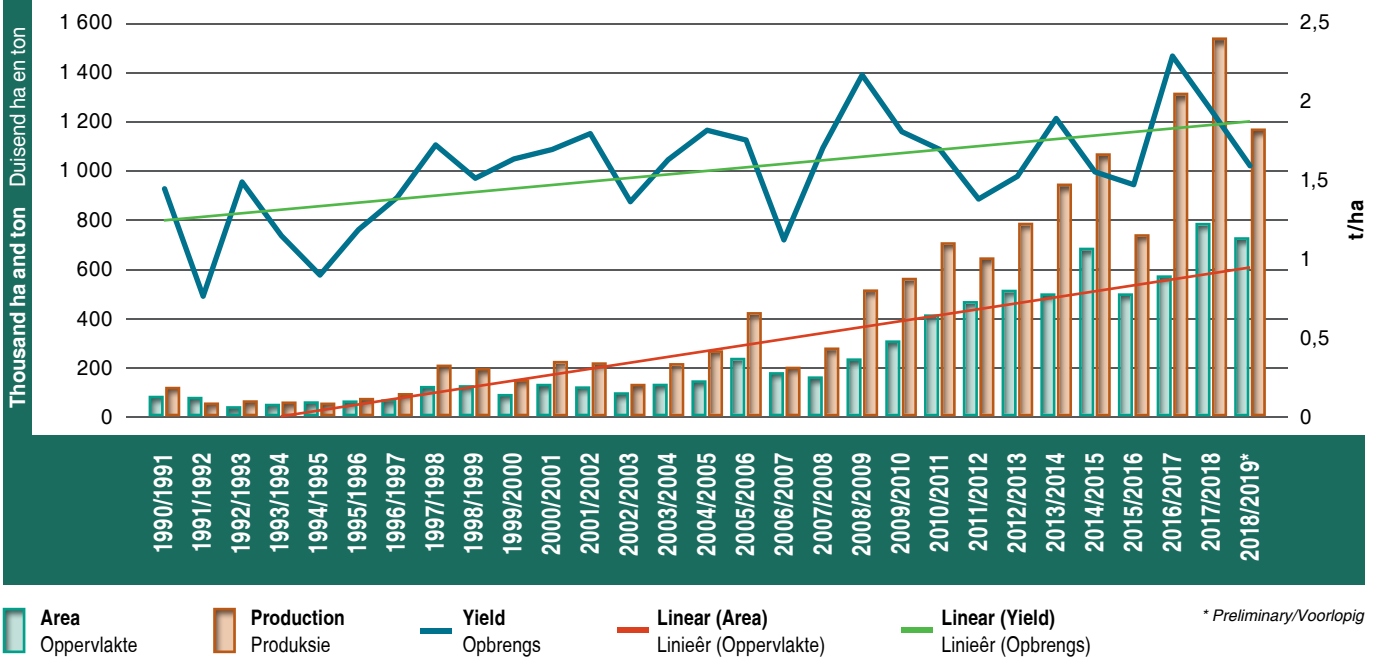
Die sonneblomsaad oppervlakte van 515 350 ha wat gedurende die 2018/2019-produksieseisoen aangeplant is, was ongeveer 14% minder as dié van die vorige seisoen. Produksietoestande vir die seisoen was uitdagend gewees en aanplantings kon later as normaal eers plaasvind – wat veroorsaak het dat nie al die beplande hektare aangeplant kon word nie. Sonneblomsaad-produksie vir die 2018/2019-seisoen word op 680 940 ton geskat teen 'n gemiddelde opbrengs van 1,32 t/ha. Dit is laer as die vorige seisoen se opbrengs van 1,43 t/ha, maar effens hoër as die afgelope vyf jaar se gemiddelde opbrengs van 1,27 t/ha. **Grafiek 3** (op bladsy 58) toon die totale oppervlakte aangeplant, produksie en gemiddelde opbrengs van sonneblomsaad sedert die 1990/1991-seisoen.

GRAPH 1 – Production of white and yellow maize.
GRAFIEK 1 – Produksie van wit- en geelmielies.



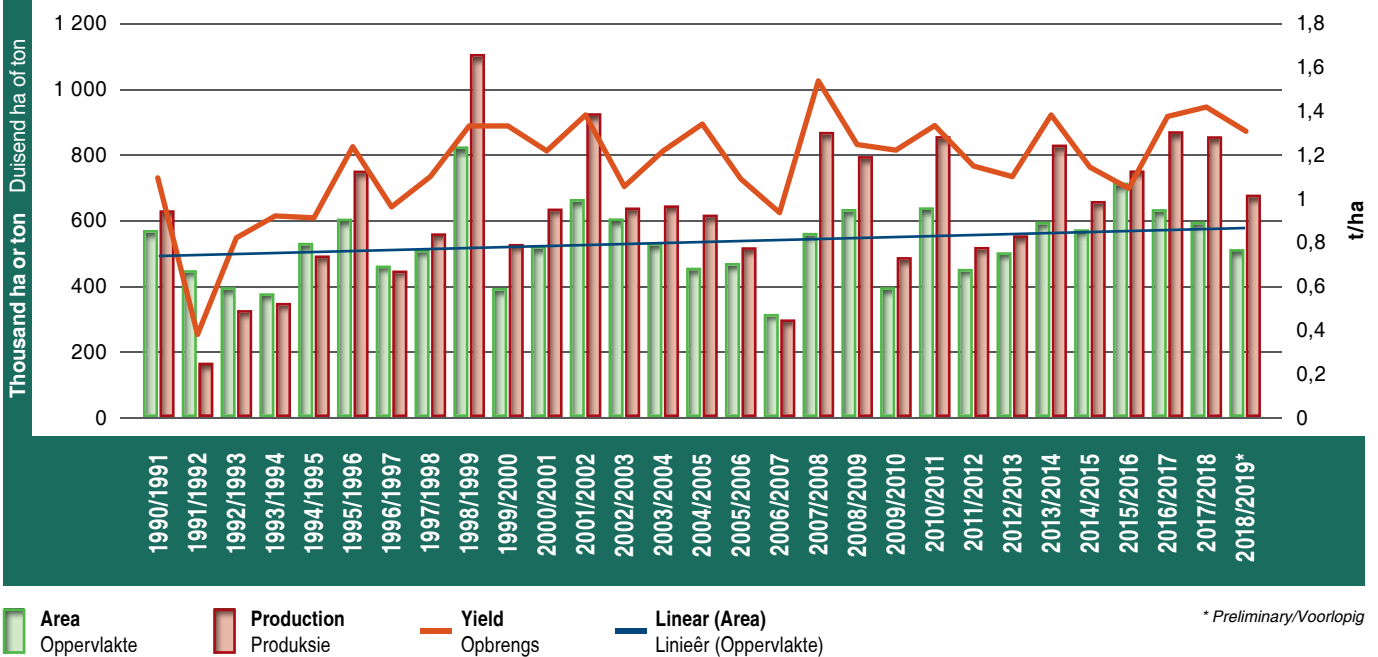
GRAPH 2 – Soybeans: Area planted, production and yield.

GRAFIEK 2 – Sojabone: Oppervlakte geplant, produksie en opbrengs.



GRAPH 3 – Sunflower seed: Area planted, production and yield.

GRAFIEK 3 – Sonneblomsaad: Oppervlakte geplant, produksie en opbrengs.



Sorghum

Graph 4 shows the total area planted, production and the average yield of sorghum in South Africa since the 1990/1991 season. The area of sorghum planted during this period showed a clear declining trend, as did the production, although the average yield showed an increase over this period. During the 2018/2019 season a total of 50 500 ha of sorghum were planted in South Africa.

The total production for the season was estimated at 130 875 tons, and the average sorghum yield for the 2018/2019 season amounted to 2,59 t/ha. This was considerably lower than the previous season's yield of 3,99 t/ha, and also slightly lower than the average yield of 2,82 t/ha for the past five years.

Groundnuts

Graph 5 shows the area planted, production and the average yield of groundnuts in South Africa since the 2000/2001 season. The 2018/2019 season will certainly once more be remembered as a challenging production season. Due to the late rain, a considerable amount of groundnuts could not be planted.

The total area of groundnuts planted during the 2018/2019 production season was 20 050 ha. Total production for the season was estimated at 20 030 tons, with an average yield of 0,99 t/ha. Although the average yield for the 2018/2019 season was slightly better than the yield of 0,95 t/ha of the previous season, it was considerably lower than the average yield of 1,17 t/ha for the past five years.

Wheat

The 2018/2019 season was a very challenging one for wheat production, with the rain and environmental conditions starting to swing in producers' favour only late in the season, especially in the Western Cape. Dry conditions prevailed for the greatest part of the production season, and strong winds led to challenging production conditions. The total area of 503 350 ha planted during the 2018/2019 season was approximately 2,33% higher than the previous season's plantings of 491 600 ha. According to the Crop Estimates Committee (CEC)'s final estimate for winter grains for the 2018/2019 season, the total production amounted to 1 868 000 tons. This was approximately 17,83% higher than the previous season's production.

Sorghum

Grafiek 4 toon die sorghum-oppervlakte aangeplant, produksie en gemiddelde opbrengs sedert die 1990/1991-seisoen. Die sorghum-oppervlakte het gedurende hierdie tydperk 'n duidelike dalende tendens getoon en gevolglik die produksie ook, hoewel die gemiddelde opbrengs 'n stygende tendens oor hierdie tydperk getoon het. Gedurende die 2018/2019-seisoen is 'n totaal van 50 500 ha sorghum in Suid-Afrika aangeplant.

Die totale produksie vir die seisoen word op 130 875 ton geskat en die gemiddelde sorghumopbrengs vir die 2018/2019-seisoen beloop 2,59 t/ha. Dit is aansienlik laer as die vorige seisoen se opbrengs van 3,99 t/ha en ook effens laer as die afgelope vyf jaar se gemiddelde opbrengs van 2,82 t/ha.

Grondbone

Grafiek 5 toon die oppervlakte aangeplant, produksie en gemiddelde opbrengs van grondbone in Suid-Afrika sedert die 2000/2001-seisoen. Die 2018/2019-seisoen was sekerlik weer een wat onthou sal word as 'n uitdagende produksieseisoen. As gevolg van die laat reën kon heelwat grondbone nie aangeplant word nie.

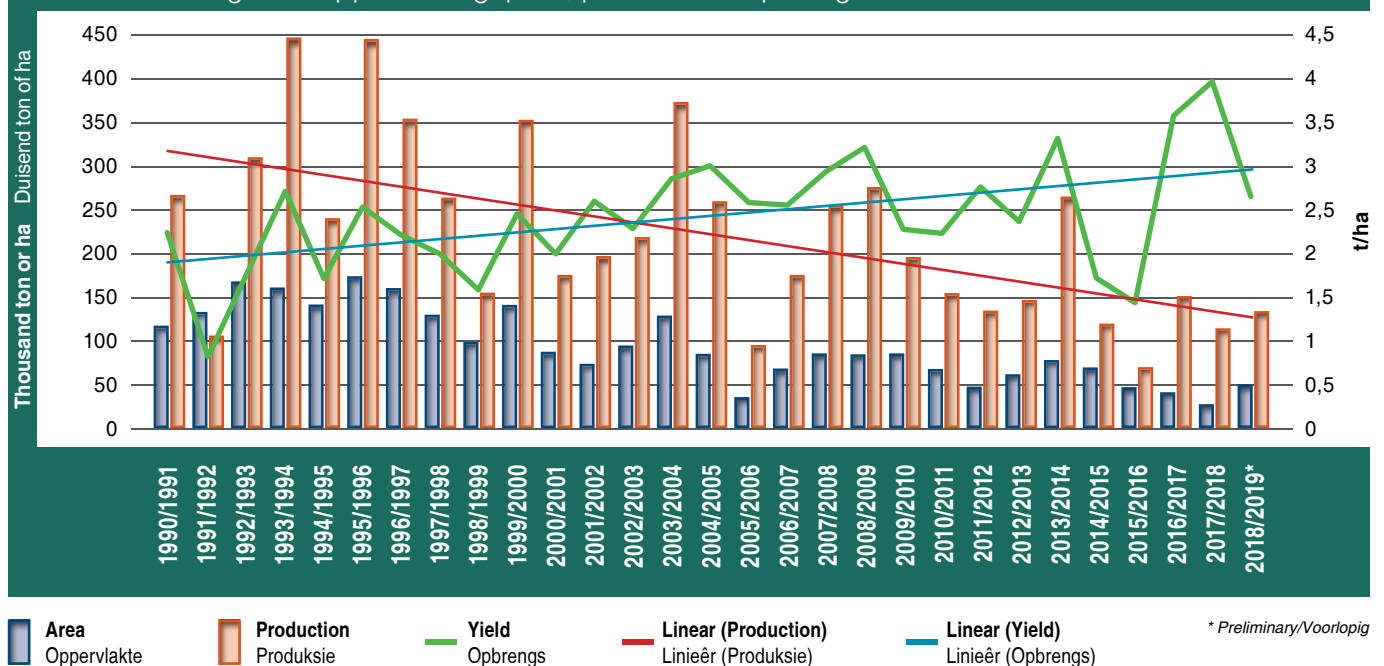
Die totale oppervlakte grondbone wat gedurende die 2018/2019-produksie-seisoen aangeplant is, was 20 050 ha. Totale produksie vir die seisoen word op 20 030 ton geskat teen 'n gemiddelde opbrengs van 0,99 t/ha. Hoewel die gemiddelde opbrengs vir die 2018/2019-seisoen effens beter was as die vorige seisoen se opbrengs van 0,95 t/ha, was dit aansienlik laer as die afgelope vyf jaar se gemiddelde opbrengs van 1,17 t/ha.

Koring

Die 2018/2019-seisoen was 'n baie uitdagende seisoen vir koringproduksie met die reën en omgewingstoestande wat veral in die Wes-Kaap eers laat in die seisoen in produsente se guns begin tel het. Droë toestande het vir die grootste gedeelte van die produksieseisoen geheers en sterk winde het gelei tot uitdagende produksietoestande. Die totale oppervlakte van 503 350 ha wat gedurende die 2018/2019-seisoen aangeplant is, was ongeveer 2,33% meer as die vorige seisoen se aanplantings van 491 600 ha. Volgens die Nasionale Oesskattingkomitee (NOK) se finale skatting van wintergrane vir die 2018/2019-seisoen het die totale produksie 1 868 000 ton beloop. Dit was ongeveer 17,83% hoër as die vorige seisoen se produksie.

GRAPH 4 – Sorghum: Area planted, production and yield.

GRAFIEK 4 – Sorghum: Oppervlakte geplant, produksie en opbrengs.



This higher production can be largely attributed to the wetter conditions where the rain fell at the right time in the Western Cape, with the total production for this province for the season reported at 890 500 tons – an increase of 34,1% from the wheat production for the previous season in the Western Cape. The average yield for the 2018/2019 season was reported as 3,71 t/ha, which was higher than the previous season's average yield of 3,12 t/ha. The Western Cape's average yield for the 2018/2019 season was 2,8 t/ha, compared to the previous season's 1,8 t/ha. **Graph 6** shows the total area planted, production and the average yield of wheat since the 1990/1991 season.

Dié hoër produksie kan grootliks toegeskryf word aan die natter toestande waar die neerslag op die regte tye in die Wes-Kaap voorgekom het, met hierdie provinsie se totale produksie vir die seisoen wat op 890 500 ton gerapporteer is – 'n styging van 34,1% vanaf die vorige seisoen se koringproduksie in die Wes-Kaap. Die gemiddelde opbrengs vir die 2018/2019-seisoen is op 3,71 t/ha gerapporteer, wat hoër was as die vorige seisoen se gemiddelde opbrengs van 3,12 t/ha. Die Wes-Kaap se gemiddelde opbrengs vir die 2018/2019-seisoen was 2,8 t/ha teenoor die vorige seisoen se 1,8 t/ha. **Grafiek 6** toon die aangeplante koringoppervlakte, produksie en gemiddelde opbrengs sedert die 1990/1991-seisoen.

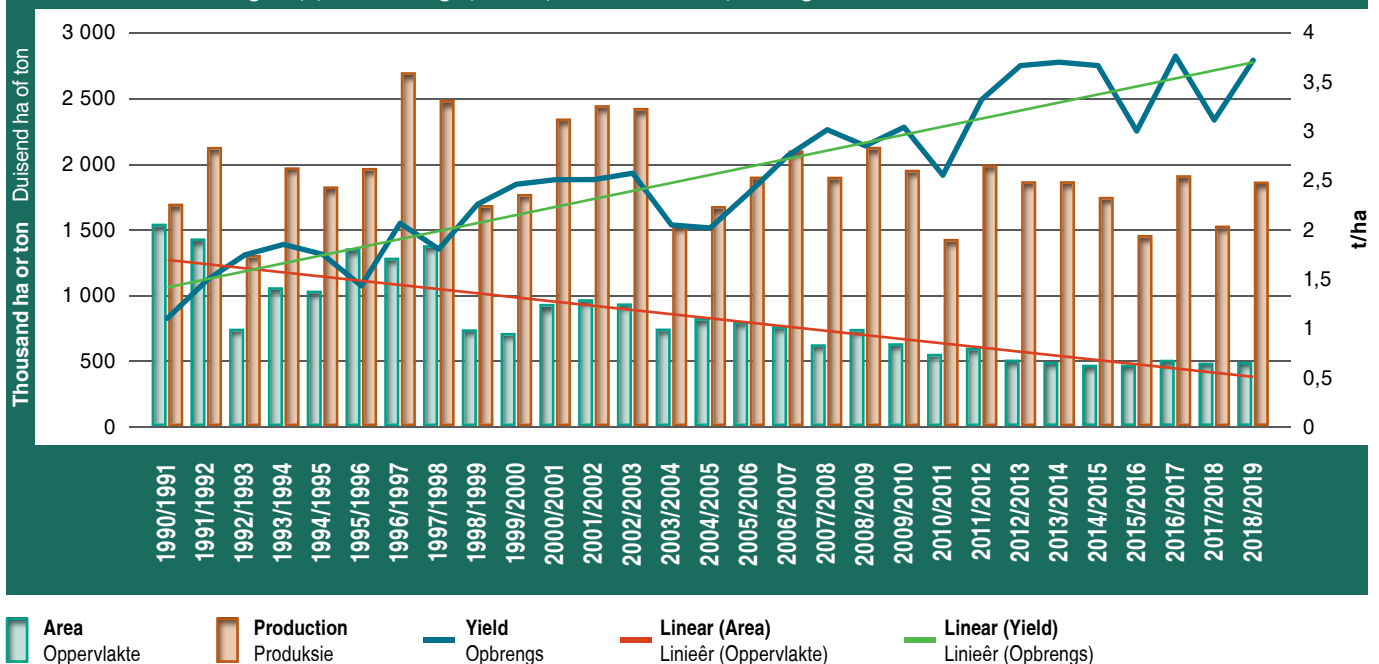
GRAPH 5 – Groundnuts: Area planted, production and yield.

GRAFIEK 5 – Grondbone: Oppervlakte geplant, produksie en opbrengs.



GRAPH 6 – Wheat: Area planted, production and yield.

GRAFIEK 6 – Koring: Oppervlakte geplant, produksie en opbrengs.



Malt barley

The malt barley area planted for the 2018/2019 season was reported as 119 000 ha, which represented an increase of approximately 23,21% on that planted during the 2017/2018 season. According to the CEC's final estimate for winter grains, the production for the 2018/2019 season was 421 500 tons, which was 27,17% higher than the previous season's production. This was due to an increase in the area planted, but also to better production conditions that prevailed in the Western Cape during the growing season. The average yield for the 2018/2019 season was reported as 3,54 t/ha, which was higher than the previous season's 3,36 t/ha. The long-term average yield of barley was approximately 3,3 t/ha. **Graph 7** (on page 62) shows the total area planted, production and the average yield of malt barley since the 2000/2001 season.

Canola

Graph 8 (on page 62) shows the area planted, production and average yield of canola from the 1998/1999 production season up to the 2018/2019 production season. The total area planted from the 2017/2018 season up to the 2018/2019 season declined by about 1,09% and was reported to be 77 000 ha. During this period the total production increased by about 1,05%, and according to the CEC's final production estimate for the 2018/2019 season was estimated at 104 500 tons, compared to the 93 500 tons for the previous season.

Moutgars

Die moutgars-oppervlakte aangeplant vir die 2018/2019-seisoen is as 119 000 ha gerapporteer, wat 'n toename van ongeveer 23,21% verteenwoordig teenoor wat gedurende die 2017/2018-seisoen aangeplant is. Die produksie vir 2018/2019-seisoen was volgens die NOK se finale skatting van wintergrane 421 500 ton, wat 27,17% hoër is as die vorige seisoen se produksie. Dit was weens 'n toename in die oppervlakte wat aangeplant is, maar was ook as gevolg van beter produksietoestande wat gedurende die groeiseisoen in die Wes-Kaap geheers het. Gemiddelde opbrengs vir die 2018/2019-seisoen is op 3,54 t/ha gerapporteer wat hoër was as die vorige seisoen se 3,36 t/ha. Die langtermyn gemiddelde opbrengs van gars is ongeveer 3,3 t/ha. **Grafiek 7** (op bladsy 62) toon die oppervlakte aangeplant, produksie en gemiddelde opbrengs van moutgars sedert die 2000/2001-seisoen.

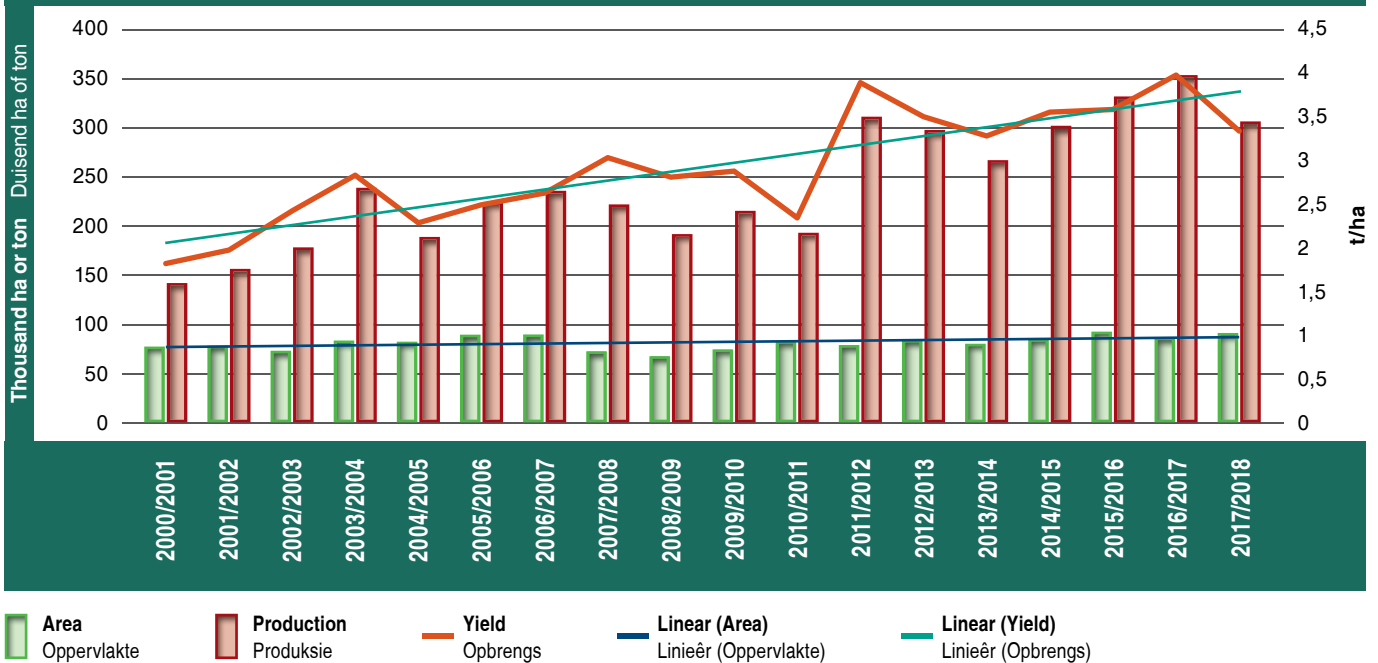
Kanola

Grafiek 8 (op bladsy 62) toon die oppervlakte aangeplant, produksie en gemiddelde opbrengs van kanola vanaf 1998/1999-produksie-seisoen tot en met die 2018/2019-produksie-seisoen. Die totale oppervlakte aangeplant het met ongeveer 1,09% afgeneem vanaf die 2017/2018-seisoen tot en met die 2018/2019-seisoen en is op 77 000 ha gerapporteer. Die totale produksie het gedurende hierdie tydperk met ongeveer 1,05% toegeneem en was volgens die NOK se finale produksieskatting vir die 2018/2019-seisoen op 104 500 ton geskat teenoor die vorige seisoen se 93 500 ton.



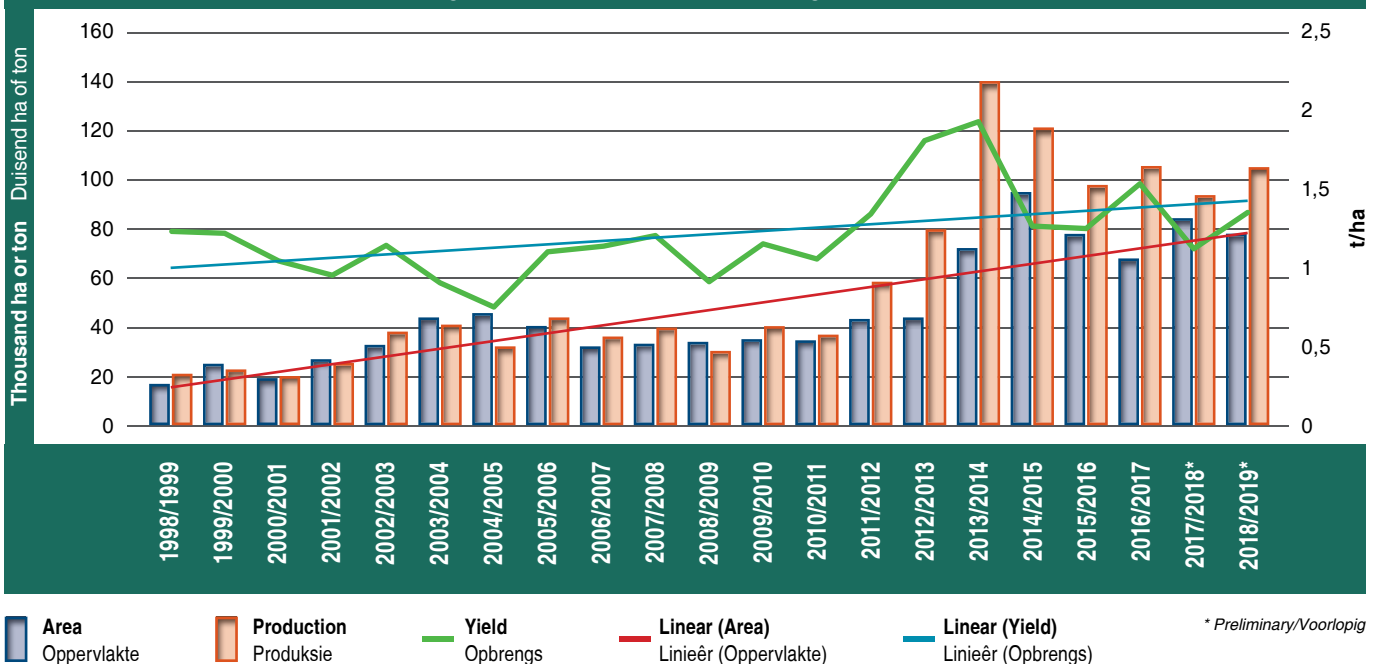
GRAPH 7 – Malting barley: Area planted, production and yield.

GRAFIEK 7 – Moutgars: Oppervlakte geplant, produksie en opbrengs.



GRAPH 8 – Canola: Area planted, production and yield.

GRAFIEK 8 – Kanola: Oppervlakte geplant, produksie en opbrengs.



* Preliminary/Voorlopig

The average yield for the 2018/2019 season was 1,36 t/ha, compared to the 1,11 t/ha for the previous season and the ten-year average yield of 1,1 t/ha. Weather conditions in the Western Cape, where all the country's canola is produced, were unfavourable, with dry conditions prevailing for the biggest part of the production season. However, during the seed-filling stage good rains were received, which led to better yields.

Die gemiddelde opbrengs vir die 2018/2019-seisoen was 1,36 t/ha teenoor die vorige seisoen se 1,11 t/ha en die tienjaar gemiddelde opbrengs van 1,1 t/ha. Weersomstandighede in die Wes-Kaap, waar al die land se kanola geproduseer word, was vir die grootste gedeelte van die produksieseisoen ongunstig met droë toestande, maar het tydens saadvulstadium goeie reëns ontvang – wat tot beter opbrengste aanleiding gegee het.

Input and production overview

Inset- en produksie-oorsig



Corné Louw
SENIOR ECONOMIST: INPUTS
SENIOR EKONOM: INSETTE



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NAVORSINGSKOÖRDINEERDER
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Ikageng Maluleke
AGRICULTURAL ECONOMIST
LANDBOU-EKONOM

Keeping a close watch on input and production costs

The agricultural input and production environment form an indispensable part of the grain industry as sustainable production is greatly determined by input costs and the profitability of each grain commodity.

This input and production overview provides a bird's eye view of the input environment during the year under review regarding various input industries, e.g. seed, fertiliser, agrochemical, diesel and agricultural machinery. It also focuses on actual income and production cost figures for summer grain crops.

INPUT OVERVIEW

Input environment

INTRODUCTION

South Africa imports most production inputs and therefore price discovery of local prices is directly impacted by international prices, energy prices and the exchange rate. Throughout the reporting period, the value of the rand was volatile, varying between a monthly average strongest level of R13,38/\$ in April and the weakest level of R15,17/\$ in August 2019. From September 2018 to September 2019, the value of the rand depreciated by 1%, despite the seesaw movement throughout the year.

The Brent crude oil price decreased considerably over the reporting period, from an average of \$80,54 per barrel in October 2018 to \$62,02 per barrel in September 2019 (-23%). Although there was a decrease in crude oil price over the reporting period, changes in international market prices as well volatility in the exchange rate, still made decision-making with respect to effective purchases a challenge. The volatility in the exchange rate and the Brent crude oil price is displayed in **Graph 1** (on page 64).

Dispute resolution

Grain SA assisted various members during the reporting period – particularly with respect to dispute resolution. Disputes on seed quality, agrochemicals, VAT, the diesel rebate and fertiliser were dealt with in collaboration with Grain SA members.

The seed industry

Seed is an important production input and depending on the plant density, constitutes between 10% and 17% of a maize producer's variable production costs. In order to increase transparency and competitiveness in this industry, seed prices are monitored by Grain SA annually. Ongoing discussions with seed companies and the South African National Seed Organisation (Sansor) are also held to communicate the needs and concerns of the members of Grain SA. The consistent increase in seed prices has always been a major

'n Wakende oog oor inset- en produksiekoste gehou

Die landbou-inset- en produksie-omgewing maak 'n waardevolle deel van die graanbedryf uit, aangesien volhoubare produksie in 'n groot mate deur insetkoste en die winsgewendheid van elke graan kommoditeit bepaal word.

Hierdie inset- en produksie-oorsig verskaf 'n algemene blik op die insetomgewing gedurende die oorsigjaar ten opsigte van verskeie insetbedrywe, soos saad, kunsmis, landbouchemikalieë, diesel en landboumasjinerie. Dit fokus ook op werklike inkomste- en produksiekostesysfers vir somergraangewasse.

INSETOORSIG

Insetomgewing

INLEIDING

Suid-Afrika voer die meeste produksie-insette in, en die bepaling van plaaslike pryse word dus direk deur internasionale pryse, energiepryse en die wisselkoers geraak. Regdeur die verslagdoeningstydperk was die waarde van die rand uiters onbestendig en dit het tussen 'n maandelikse gemiddelde sterkste vlak van R13,38/\$ in April en die swakste vlak van R15,17/\$ in Augustus 2019 gewissel. Vanaf September 2018 tot September 2019 het die waarde van die rand met 1% gedaal, ten spyte van die wipplankbeweging regdeur die jaar.

Oor die verslagdoeningstydperk het Brent-ruolie se prys beduidend gedaal vanaf 'n gemiddelde van \$80,54 per vat in Oktober 2018 tot \$62,02 per vat in September 2019 (-23%). Hoewel daar oor die verslagdoeningstydperk 'n daling in die prys van ruolie was, het veranderinge in internasionale markpryse asook onbestendigheid in die wisselkoers steeds besluitneming ten opsigte van doeltreffende aankope 'n uitdaging gemaak. Die onbestendigheid van die wisselkoers en die prys van Brent-ruolie kan in **Grafiek 1** (op bladsy 64) gesien word.

Geskilbeslegting

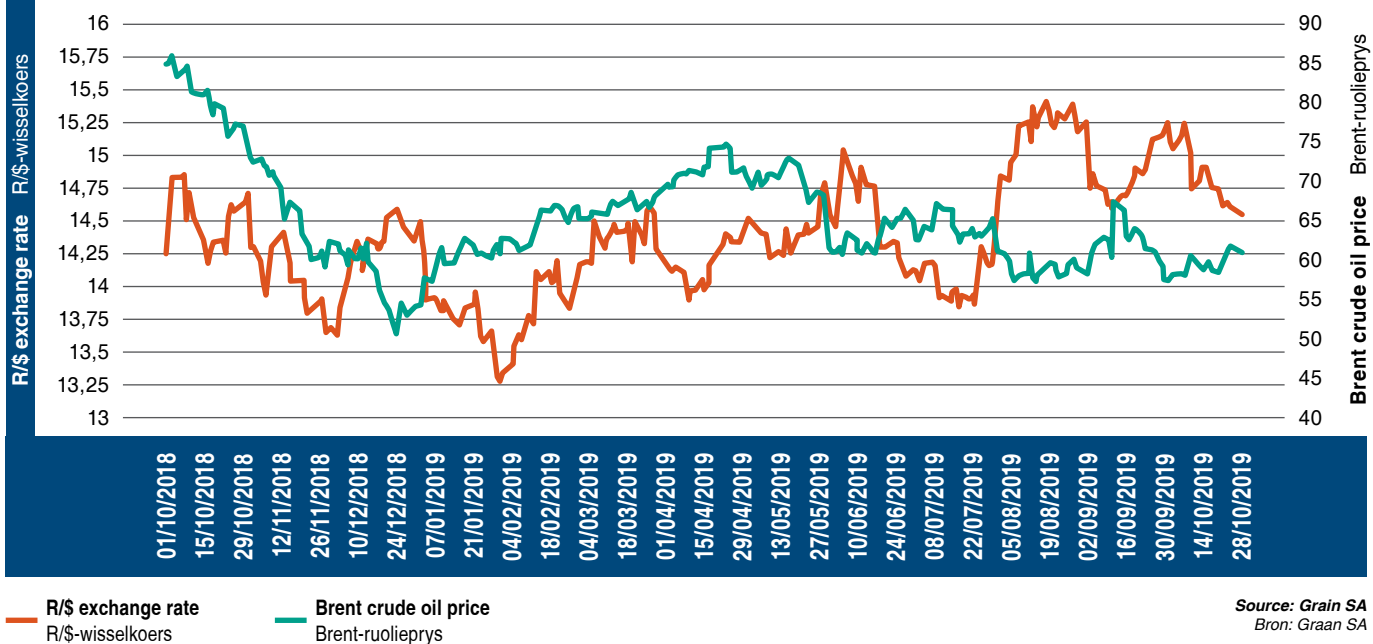
Graan SA het gedurende die verslagdoeningstydperk verskeie lede bygestaan – veral ten opsigte van geskilbeslegting. Geskille oor saadgehalte, landbouchemikalieë, BTW, die dieselmis en kunsmis is in samewerking met Graan SA-lede hanteer.

Die saadbedryf

Saad is 'n belangrike produksie-inset, en afhangend van die plantdigtheid, maak dit tussen 10% en 17% van 'n mielieprodusent se veranderlike produksiekoste uit. Saadpryse word jaarliks deur Graan SA gemoniteer om deursigtigheid en mededingendheid in hierdie bedryf te verhoog. Deurlopende gesprekke met saadmaatskappye en die Suid-Afrikaanse Nasionale Saadorganisasie (Sansor) word ook gevoer om die behoeftes en bekommernisse van Graan SA se lede oor te dra. Die deurlopende verhoging in saadpryse was nog altyd 'n belangrike

GRAPH 1 – R/\$ exchange rate and Brent crude oil price.

GRAFIEK 1 – R/\$-wisselkoers en prys van Brent-ruolie.



concern to grain producers and some seed companies might start experiencing resistance to high prices.

SEED PRICES

A total of 34 wheat cultivars are available for the northern production areas (irrigation included), while nine different cultivars are available commercially for the Western Cape. Western Cape producers have a choice between eleven available barley cultivars.

Wheat seed prices increased by an average of 6,5% since last year. Some cultivars increased by up to 9,4%, while others decreased by as much as 4%. What is interesting is that in the northern production areas, wheat seed costs R367 per 25 kg bag on average, while seed prices in the Cape amount to R409 per 50 kg bag. Barley seed prices increased by 4,6% on average.

Canola producers have a choice between 16 cultivars that are commercially available. The prices of canola seed remained virtually unchanged in the 2019 season.

Maize seed prices for the 2019/2020 production season rose by 4,5% on average. Sunflower seed prices increased by 4,3% on average, grain sorghum seed prices by 2,5%, while soybean seed prices decreased by 1,9%. A good barometer for assessing price increases is the producer price index (PPI). Up until May 2019, when seed prices were published, the PPI was 5%. This means that seed prices did not exceed production cost inflation on an average basis.

Maize seed prices can be analysed further by comparing them with the price of maize. Since the 2001/2002 production season the maize price index (Graph 2) weakened significantly compared to the maize seed price index. With an estimated average producer price¹ of R2 370 per ton for the coming season (2019/2020), the maize price index minimally increased more than maize seed prices.

BREEDING AND TECHNOLOGY LEVY

According to seed companies, roughly 80% of soybean plantings and 70% of wheat plantings are annually planted with seed that was held back. The holding back of seed – which is legal – causes a vicious cycle that limits and to a great extent prevents investment in the soy and wheat seed industry (in virtually all open-pollinated crops). According to seed companies it takes about twelve years and great expenses to introduce a new cultivar to the market. Without a proper funding model, the practice of holding back seed prevents new cultivars and the latest technology from coming to South Africa.

bekommernis vir graanprodusente, en sommige saadmaatskappye kan begin om weerstand teen hoë pryse te ervaar.

SAADPRYSE

'n Totaal van 34 koringkultivars is beskikbaar vir die noordelike produ-serende gebiede (besproeiing ingesluit), terwyl nege verskillende kultivars vir die Wes-Kaap kommersieel beskikbaar is. Wes-Kaapse produsente het 'n keuse van elf beskikbare garskultivars.

Koringsaadpryse het sedert verlede jaar op 'n gemiddelde basis met 6,5% gestyg. Sommige kultivars het tot 9,4% gestyg, terwyl ander weer met soveel as 4% gedaal het. Wat interessant is, is dat koringsaadpryse in die noordelike produksiegebiede gemiddeld R367 per 25 kg-sakkie kos, terwyl saadpryse in die Kaap R409 per 50 kg-sakkie beloop. Garsaadpryse het op 'n gemiddelde basis met 4,6% gestyg.

Kanolaprodusente het 'n keuse van 16 kultivars wat kommersieel beskikbaar is. Pryse van kanolasaad het vir die 2019-seisoen bykans onveranderd gebly.

Mieliesaadpryse vir die 2019/2020-produksieseisoen het gemiddeld met 4,5% gestyg. Sonneblomsaadpryse het gemiddeld met 4,3% gestyg en graansorghumsaadpryse met 2,5%, terwyl sojaboonsaadpryse met 1,9% gedaal het. 'n Goeie barometer vir die evaluering van pryshogings is die produsenteprysindex (PPI). Tot en met Mei 2019, toe saadpryse gepubliseer is, het die PPI met 5% gestyg. Dit beteken dat saadpryse nie op 'n gemiddelde grondslag produksiekoste-inflasie oorskry het nie.

Mieliesaadpryse kan verder ontleed word deur dit met mieliepryse te vergelyk. Sedert die 2001/2002-produksieseisoen het die mielieprysindex (Grafiek 2) vergeleke met die mieliesaadprysindex beduidend verswak. Met 'n geraamde gemiddelde produsenteprys¹ van R2 370 per ton vir die komende seisoen (2019/2020), het die mielieprysindex net effens meer as mieliesaadpryse gestyg.

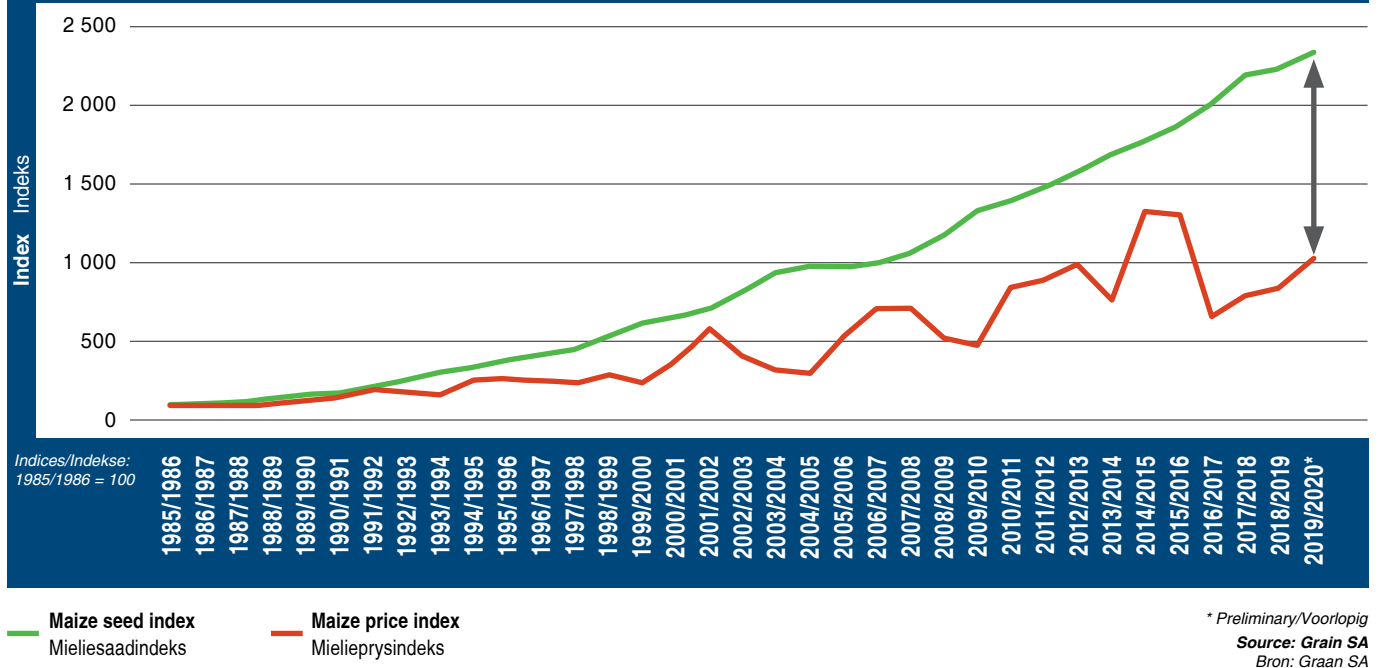
TELING- EN TEGNOLOGIEHEFFING

Volgens saadmaatskappye word ongeveer 80% van sojaboonaanplantings en 70% van koringaanplantings jaarliks geplant met saad wat teruggehou is. Hierdie terughouding van saad – wat wettig is – veroorsaak 'n bouse siklus wat belegging in die sojaboon- en koringsaadbedryf (in feitlik alle oop-bestuifde gewasse) beperk en in 'n groot mate voorkom. Volgens saadmaatskappye neem dit ongeveer twaalf jaar en groot onkoste om 'n nuwe kultivar op die mark te plaas. Sonder 'n behoorlike befondsingsmodel verhoed die praktyk om saad terug te hou dat nuwe kultivars en die jongste tegnologie na Suid-Afrika gebring word.

¹ Average producer price = Safex, July 2020 price - average differential cost - handling costs

¹ Gemiddelde produsenteprys = Safex, Julie 2020-prys - gemiddelde differensiële koste - hanteringskoste

GRAPH 2 – Indices of the price of maize seed and the producer price of maize.
GRAFIEK 2 – Indekse van die prys van mieliesaad en die produsenteprys van mielies.



Since March 2019, a breeding and technology levy has been implemented on soybeans to compensate seed companies for their investment in genetics and technology in the soybean seed market. Since its inception there has already been positives of this system visible.

A breeding and technology levy has been running on wheat and barley for a third year already and on oats for one year.

Many cultivars have been released for these crops since the inception of the breeding and technology levy.

SEED AVAILABILITY

Sansor assured Grain SA during the annual meeting of the two organisations (17 September 2019) that a sufficient quantity of grain and oilseed seeds will be available for the 2019/2020 production season. However, they stated that seed of certain popular sizes and varieties might be limited. This was with the exception of groundnut seed that struggled with production due to the late rains and drought of the previous season.

Liaison with Sansor on a regular basis is important to ensure that problems can be solved together. At the same time, greater efficiencies in grain and oilseed production can be achieved. Other issues that were addressed with the representative body of the seed industry include:

- ▶ Market trends and production costs for the grain and oilseed industry.
- ▶ Maize seed exports to the USA.
- ▶ Breeding and technology levy.
- ▶ Sclerotinia on sunflower and soybean seed.
- ▶ Alternaria on sunflower.
- ▶ New cultivars vs new active ingredients.
- ▶ Maize cultivar trials.
- ▶ Sansor certification scheme.
- ▶ Possible alternative for thiram seed treatment.
- ▶ Alternative breeding technology and South Africa's stance on it.
- ▶ ISF Congress 2020 in South Africa.

The fertiliser industry

FERTILISER PRICES

From September 2018 to September 2019, international prices of ammonia, urea, and DAP decreased with varying amounts, while potassium chloride increased significantly. **Table 1** (on page 66) shows the year-on-year price changes of international fertiliser prices in dollar terms.

Sedert Maart 2019 is 'n teling- en tegnologieheffing op sojabone geïmplementeer om saadmaatskappye vir hulle belegging in genetica en tegnologie in die sojaboonsaadmark te vergoed. Sedert dit ingestel is, het die stelsel reeds positiewe resultate getoon.

'n Teling- en tegnologieheffing is reeds vir die derde jaar op koring en gars van toepassing, en op hawer reeds vir 'n jaar.

Talle kultivars is reeds sedert die implementering van die teling- en tegnologieheffing vrygestel.

BESKIKBAARHEID VAN SAAD

Sansor het Graan SA tydens die jaarlikse vergadering van die twee organisasies (17 September 2019) verseker dat 'n voldoende hoeveelheid graan- en oliesaad-saad vir die 2019/2020-produksieseisoen beskikbaar sal wees. Hulle het egter gesê dat saad van sekere gewilde groottes en variëteite dalk beperk kan wees. Dit was met die uitsondering van grondboonsaad, wat as gevolg van die laat reën en die droogte van die vorige seisoen uitdagings met produksie getoon het.

Dit is belangrik om op 'n gereelde grondslag met Sansor te skakel om seker te maak dat probleme gesamentlik opgelos kan word. Terselfdertyd kan groter doeltreffendheid met graan- en oliesaadproduksie bereik word. Ander kwessies wat met die verteenwoordigende liggaam van die saadbedryf bespreek is, sluit in:

- ▶ Markttendense en produksiekoste vir die graan- en oliesadebedryf.
- ▶ Mieliesaaduitvoere na die VSA.
- ▶ Teling- en tegnologieheffing.
- ▶ Sclerotinia op sonneblom- en sojaboonsaad.
- ▶ Alternaria op sonneblom.
- ▶ Nuwe kultivars teenoor nuwe aktiewe bestanddele.
- ▶ Mieliekultivar evaluasieskema.
- ▶ Sansor-sertifiseringskema.
- ▶ Moontlike alternatief vir saadbehandeling met thiram.
- ▶ Alternatiewe telingstegnologie en Suid-Afrika se standpunt daaroor.
- ▶ ISF-kongres 2020 in Suid-Afrika.

Die kunsmisbedryf

KUNSMISPRYSE

Vanaf September 2018 tot September 2019 het die internasionale prys van ammoniak, ureum en DAP gedaal, terwyl kaliumchloried beduidend gestyg het. **Tabel 1** (op bladsy 66) toon die jaar-tot-jaar-prysveranderinge van internasionale kunsmispryse in dollar-terme.

TABLE 1 – International fertiliser prices in dollar terms.
TABEL 1 – Internasionale kunsmispryse in dollar-terme.

	SEPTEMBER 2018	SEPTEMBER 2019	% CHANGE
Fertiliser	USD/ton	USD/ton	%
Ammonia (Middle East)	351	235	-33,0
Urea (46) (Eastern Europe)	273	235	-13,9
DAP (USA Gulf)	438	319	-27,2
KCL (CIS)	260	324	+24,6
R/\$ exchange rate	14,69	14,84	1,0

During the period under review, the exchange rate weakened by 1%. The effect of a depreciation in the rand from R14,69/\$ in September 2018 to R14,84/\$ in September 2019 has caused international prices to decrease with a smaller amount in rand value, with only potassium chloride increasing considerably. **Table 2** indicates international fertiliser prices in rand terms, with the effect of the weaker exchange rate on prices.

	SEPTEMBER 2018	SEPTEMBER 2019	% VERAN- DERING
Kunsmis	USD/ton	USD/ton	%
Ammoniak (Midde-Ooste)	351	235	-33,0
Ureum (46) (Oos-Europa)	273	235	-13,9
DAP (VSA Golf)	438	319	-27,2
KCI (CIS)	260	324	+24,6
R/\$-wisselkoers	14,69	14,84	1,0

Gedurende die oorsigtydperk het die wisselkoers met 1% verswak. Die effek van die verswakking of depresiasie in die rand vanaf R14,69/\$ in September 2018 tot R14,84/\$ in September 2019 het internasionale pryse met 'n kleiner hoeveelheid in randwaarde laat daal, terwyl slegs kaliumchloried se prys aansienlik gestyg het. **Tabel 2** dui internasionale kunsmispryse in randterme aan, wat die uitwerking van die swakker wisselkoers op pryse of prysveranderinge toon.

TABLE 2 – International fertiliser prices in rand terms.
TABEL 2 – Internasionale kunsmispryse in rand-terme.

	SEPTEMBER 2018	SEPTEMBER 2019	% CHANGE
Fertiliser	R/ton	R/ton	%
Ammonia (Middle East)	5 156	3 487	-32,4
Urea (46) (Eastern Europe)	4 010	3 487	-13,0
DAP (USA Gulf)	6 434	4 734	-26,4
KCL (CIS)	3 819	4 808	+25,9

South Africa imports more than 80% of its fertiliser needs; therefore, local and international prices are expected to follow a similar trend. Local fertiliser price movements are mainly influenced by international fertiliser prices as well as the value of the rand.

The local fertiliser prices between October 2018 and October 2019 also indicate a general decrease in prices except for LAN and potassium chloride. **Graph 3** also indicates the downward trend in international fertiliser prices the past year (evident from after the vertical blue line).

Graph 4 shows the fertiliser price index compared to the maize price index since the 1985/1986 production season. At an estimated average producer price² of R2 370 per ton for the coming production season (2019/2020), the maize price index and the fertiliser price index is closing a bit. Although the fertiliser price index is showing a bit of a convergence, the gap between the two indexes is still large.

ANNUAL MEETING WITH FERTASA

The annual meeting between Grain SA and the Fertiliser Association of Southern Africa (Fertasa) took place on 25 July 2019. Important matters discussed at the meeting included the following:

- ▶ Market trends in the grain and oilseed industry and production costs for the 2019/2020 production season.
- ▶ Fertiliser costs in South Africa.
- ▶ International and local situation in the fertiliser industry.
- ▶ The availability of fertiliser and transport logistics.
- ▶ Lime industry trends.
- ▶ South Africa's dependence on imports.
- ▶ The fertiliser and lime monitoring project.
- ▶ Fertiliser Bill.
- ▶ Fertasa's view of granular lime.
- ▶ Fertiliser research on soybeans.

	SEPTEMBER 2018	SEPTEMBER 2019	% VERAN- DERING
Kunsmis	R/ton	R/ton	%
Ammoniak (Midde-Ooste)	5 156	3 487	-32,4
Ureum (46) (Oos-Europa)	4 010	3 487	-13,0
DAP (VSA Golf)	6 434	4 734	-26,4
KCI (CIS)	3 819	4 808	+25,9

Suid-Afrika voer meer as 80% van sy kunsmisbehoefte in, dus word daar verwag dat plaaslike en internasionale pryse 'n ooreenstemmende tendens sal volg. Plaaslike kunsmisprysbewegings word hoofsaaklik deur internasionale kunsmispryse asook die waarde van die rand beïnvloed.

Die plaaslike kunsmispryse tussen Oktober 2018 en Oktober 2019 dui ook op 'n algemene daling in pryse, buiten vir KAN en kaliumchloried. **Grafiek 3** toon ook die afwaartse tendens in internasionale kunsmispryse oor die afgelope jaar (ná die vertikale blou lyn).

Grafiek 4 toon die kunsmisprysindeks vergeleke met die mielieprysindeks sedert die 1985/1986-produksieseisoen. Teen 'n geraamde gemiddelde produsenteprys² van R2 370 per ton vir die komende produksieseisoen (2019/2020), beweeg die mielieprysindeks en die kunsmisprysindeks effens nader aan mekaar. Hoewel die kunsmisprysindeks gedaal het, is daar steeds 'n groot gaping tussen die twee indekse.

JAARLIKSE VERGADERING MET FERTASA

Die jaarlikse vergadering tussen Graan SA en die Kunsmisvereniging van Suider-Afrika (Fertasa) het op 25 Julie 2019 plaasgevind. Belangrike sake wat tydens die vergadering bespreek is, sluit in:

- ▶ Marktendense in die graan- en oliesadebedryf en produksiekoste vir die 2019/2020-produksieseisoen.
- ▶ Kunsmiskoste in Suid-Afrika.
- ▶ Internasionale en plaaslike situasie in die kunsmisbedryf.
- ▶ Die beskikbaarheid van kunsmis en vervoerlogistiek.
- ▶ Tendense in die kalkbedryf.
- ▶ Suid-Afrika se afhanklikheid van invoere.
- ▶ Die kunsmis- en kalkmoniteringsprojek.
- ▶ Kunsmiswetsontwerp.
- ▶ Fertasa se siening van korrelkalk.
- ▶ Kunsmisnavorsing oor sojabone.

² Average producer price = Safex, July 2020 price - average differential cost - handling costs

² Gemiddelde produsenteprys = Safex, Julie 2020-prys - gemiddelde differensiële koste - hanteringskoste

GRAPH 3 – Local fertiliser prices.
GRAFIEK 3 – Plaaslike kunsmispryse.

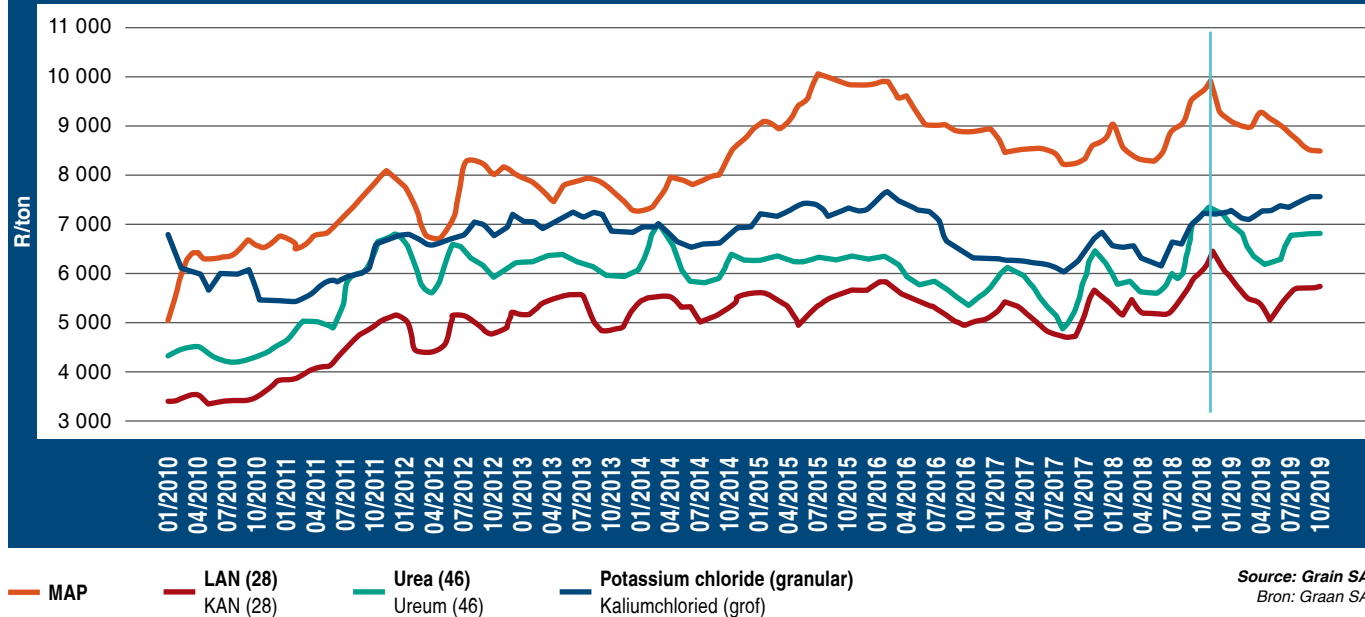
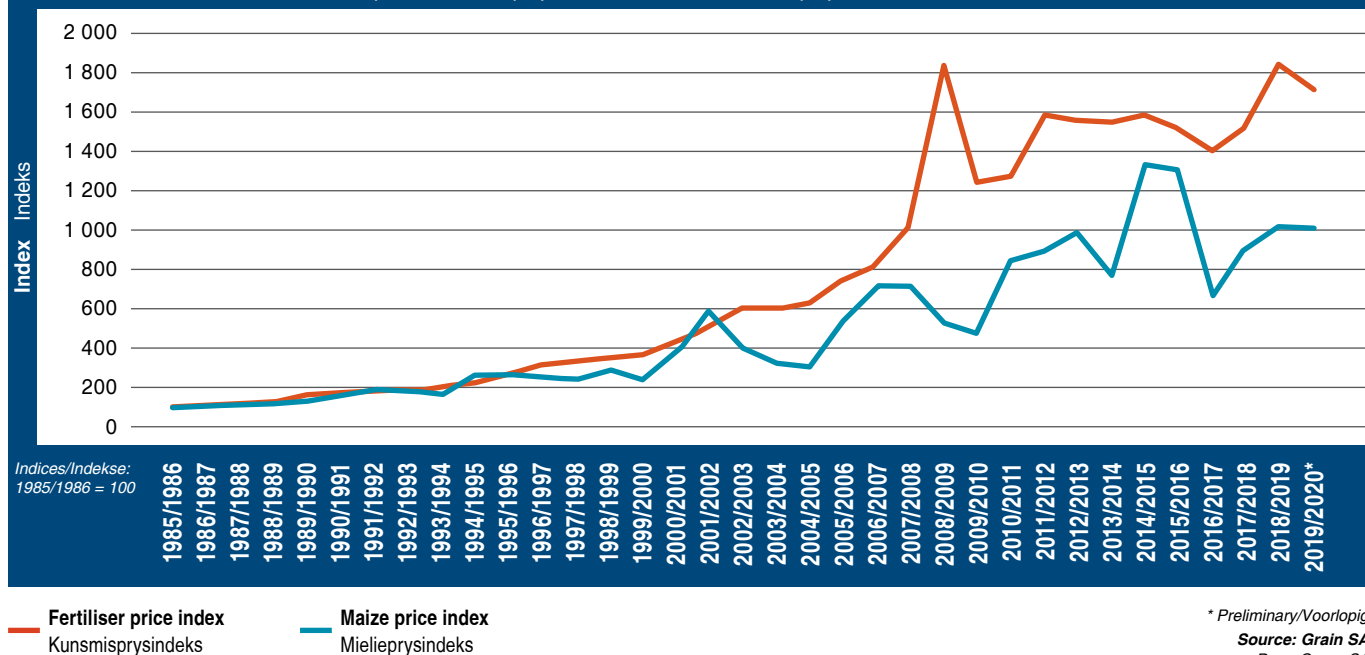


TABLE 3 – Local fertiliser prices.
TABEL 3 – Plaaslike kunsmispryse.

Fertiliser	OCTOBER 2018 R/ton	OCTOBER 2019 R/ton	% CHANGE
LAN (28)	6 037	5 915	-2,0
Urea (46)	7 134	6 782	-4,9
MAP	9 730	8 512	-12,5
KCL	7 270	7 569	+4,1

Kunsmis	OKTOBER 2018 R/ton	OKTOBER 2019 R/ton	% VERAN- DERING
KAN (28)	6 037	5 915	-2,0
Ureum (46)	7 134	6 782	-4,9
MAP	9 730	8 512	-12,5
KCI	7 270	7 569	+4,1

GRAPH 4 – Indices of the producer price of maize and the prices of fertiliser.
GRAFIEK 4 – Indeks van die produsenteprys van mielies en die prys van kunsmis.



Agrochemical industry

PRICES

Almost 100% of the active ingredients required to manufacture local agricultural chemicals are imported to South Africa. Therefore, the international prices and exchange rate are monitored as it plays an important role in domestic price trends.

Table 4 shows the international prices of the active ingredients of five herbicides used in maize. The prices are in both dollar terms as well as in rand terms.

Except for trifluralin, international herbicide price trends show decreases year-on-year. From September 2018 to September 2019, international prices of glyphosate decreased by 20,1%, while acetochlor, atrazine and metolachlor also indicated decreases of 17,6%, 8,4% and 11,6%, respectively. Trifluralin was the exception, increasing by 14,9%. In the same period under review, the rand/dollar exchange rate weakened by 1% and the impact of the depreciation can be seen when international dollar prices are converted to rand, which meant the decreases were in line with dollar terms.

Table 5 indicates international insecticide prices, which are also used in maize production (dollar and rand terms). Imidacloprid, lambda-cyhalothrin show considerable decreases of 22%, 18,2% while deltamethrin shows a moderate decrease of 6,7% and carbofuran increased by 14,9%. International prices in rand terms showed the same effect with weakening of the exchange rate.

ANNUAL MEETING WITH THE CROP PROTECTION INDUSTRY

On 29 July 2019, Grain SA's Production/Input Working Group met with CropLife, and the following issues were discussed:

- ▶ Market trends in the grain industry and production costs for the 2019/2020 production season.
- ▶ CropLife strategy.
- ▶ International and local situation in the agrochemical industry.
- ▶ Price trends and availability of agrochemicals.
- ▶ NAMC value chain study.
- ▶ Progress with normal registration.
- ▶ CropLife waste management programme.
- ▶ Clear indications of active ingredients on labels for chemicals – uniformity of a product throughout the season and colours of drum caps.

Landbouchemikalieëbedryf

PRYSE

Bykans 100% van die aktiewe bestanddele wat nodig is om plaaslike landbouchemikalieë te vervaardig, word na Suid-Afrika ingevoer. Die internasionale pryse en wisselkoers word dus gemoniteer, aangesien dit 'n belangrike rol in plaaslike prystendense speel.

Tabel 4 hieronder toon die internasionale pryse van die aktiewe bestanddele van vyf onkruidodders wat by mielies gebruik word. Die pryse is in dollar- sowel as in rand-terme.

Buiten vir trifluralien, toon internasionale onkruidodderpryse dalings op 'n jaar-tot-jaar-grondslag. Vanaf September 2018 tot September 2019 het die internasionale pryse van glifosaat met 20,1% gedaal, terwyl asetochloor, atrasiën en metolachloor ook dalings van 17,6%, 8,4% en 11,6% onderskeidelik toon. Trifluralien was die uitsondering en het met 14,9% gestyg. In dieselfde oorsigtydperk het die rand/dollar-wisselkoers met 1% verswak, en die impak van die daling kan gesien word wanneer internasionale dollar-pryse na rand omgeskakel word, wat beteken dat die dalings in ooreenstemming met dollar-terme was.

Tabel 5 toon die internasionale pryse van insekdoders wat ook in mielieproduksie gebruik word (dollar- en rand-terme). Imidaklopried en lambda-sihalotrien toon aansienlike dalings van 22% en 18,2%, terwyl deltametriën 'n matige styging van 6,7% toon, en karbofuraan met 14,9% gestyg het. Internasionale pryse in rand-terme illustreer dieselfde uitwerking met die verswakking van die wisselkoers.

JAARLIKSE VERGADERING MET DIE GEWASBESKERMINGSBEDRYF

Op 29 Julie 2019 het Graan SA se Produksie/Inset-werkgroep met CropLife vergader en die volgende sake is bespreek:

- ▶ Marktendense in die graanbedryf en produksiekoste vir die 2019/2020-produksieseisoen.
- ▶ CropLife-strategie.
- ▶ Internasionale en plaaslike situasie in die landbouchemikalieëbedryf.
- ▶ Prystendense en beskikbaarheid van landbouchemikalieë.
- ▶ NLBR-waardekettingstudie.
- ▶ Vordering met normale registrasie.
- ▶ CropLife-afvalbestuursprogram.
- ▶ Duidelike aanduidings van aktiewe bestanddele op etikette vir chemikalieë – eenvormigheid van 'n produk regdeur die seisoen en kleure van dromme se proppe.

TABLE 4 – International herbicide prices – year-on-year change (September 2018 - September 2019).

TABEL 4 – Internasionale onkruidodderpryse – jaar-tot-jaar-verandering (September 2018 - September 2019).

	SEPTEMBER 2018	SEPTEMBER 2019	% CHANGE
	USD/ton	USD/ton	%
Glyphosate (95%)	4 467	3 569	-20,1
Acetochlor (92%)	3 680	3 033	-17,6
Atrazine (97%)	3 359	3 075	-8,4
Metolachlor (97%)	3 750	3 315	-11,6
Trifluralin (95%)	4 854	5 576	+14,9

International herbicide prices – year-on-year change

	SEPTEMBER 2018	SEPTEMBER 2019	% CHANGE
	R/ton	R/ton	%
Glyphosate (95%)	65 615	52 968	-19,3
Acetochlor (92%)	54 057	45 012	-16,7
Atrazine (97%)	49 346	45 640	-7,5
Metolachlor (97%)	55 093	49 199	-10,7
Trifluralin (95%)	71 310	82 741	+16,0

	SEPTEMBER 2018	SEPTEMBER 2019	% VERAN- DERING
	USD/ton	USD/ton	%
Glifosaat (95%)	4 467	3 569	-20,1
Asetochloor (92%)	3 680	3 033	-17,6
Atrasiën (97%)	3 359	3 075	-8,4
Metolachloor (97%)	3 750	3 315	-11,6
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Internasionale onkruidodderpryse – jaar-tot-jaar-verandering

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TABLE 5 – International insecticide prices – year-on-year change (September 2018 - September 2019).
TABEL 5 – Internasionale onkruidodderpryse – jaar-tot-jaar-verandering (September 2018 - September 2019).

	SEPTEMBER 2018	SEPTEMBER 2019	% CHANGE
	USD/ton	USD/ton	%
Imidacloprid (95%)	24 829	19 357	-22,0
Lambda-cyhalothrin (95%)	47 148	38 564	-18,2
Carbofuran (99%)	13 267	15 241	+14,9
Deltamethrin (98%)	91 292	85 210	-6,7

International insecticide prices – year-on-year change

	SEPTEMBER 2018	SEPTEMBER 2019	% CHANGE
	R/ton	R/ton	%
Imidacloprid (95%)	364 733	287 255	-21,2
Lambda-cyhalothrin (95%)	692 599	572 291	-17,4
Carbofuran (99%)	194 897	226 176	+16,0
Deltamethrin (98%)	1 341 082	1 264 520	-5,71

	SEPTEMBER 2018	SEPTEMBER 2019	% VERAN- DERING
	USD/ton	USD/ton	%
Imidakloprid (95%)	24 829	19 357	-22,0
Lambda-sihalotrien (95%)	47 148	38 564	-18,2
Karbofuraan (99%)	13 267	15 241	+14,9
Deltametrien (98%)	91 292	85 210	-6,7

Internasionale insekdoderpryse – jaar-tot-jaar-verandering

	SEPTEMBER 2018	SEPTEMBER 2019	% VERAN- DERING
	R/ton	R/ton	%
Imidakloprid (95%)	364 733	287 255	-21,2
Lambda-sihalotrien (95%)	692 599	572 291	-17,4
Karbofuraan (99%)	194 897	226 176	+16,0
Deltametrien (98%)	1 341 082	1 264 520	-5,71

- ▶ New cultivars versus new active ingredients.
- ▶ Quality monitoring.
- ▶ New charts for chemical groups.

The diesel industry

During the reporting period, the domestic wholesale price of diesel in Gauteng decreased by 5,15% from R15,64 per litre in October 2018 to R14,84 per litre in October 2019.

PRICES

The factors that influence the local fuel price movements are the Brent crude oil price and the rand/dollar exchange rate as well as local fuel levies. **Graph 5** shows the international Brent crude oil price and the Gauteng wholesale price of diesel over time. Over a period of a year, the Brent crude oil price decreased by 22% from US\$79,13 per barrel

- ▶ Nuwe kultivars teenoor nuwe aktiewe bestanddele.
- ▶ Kwaliteitsmonitering.
- ▶ Nuwe kaarte vir groepe chemiese stowwe.

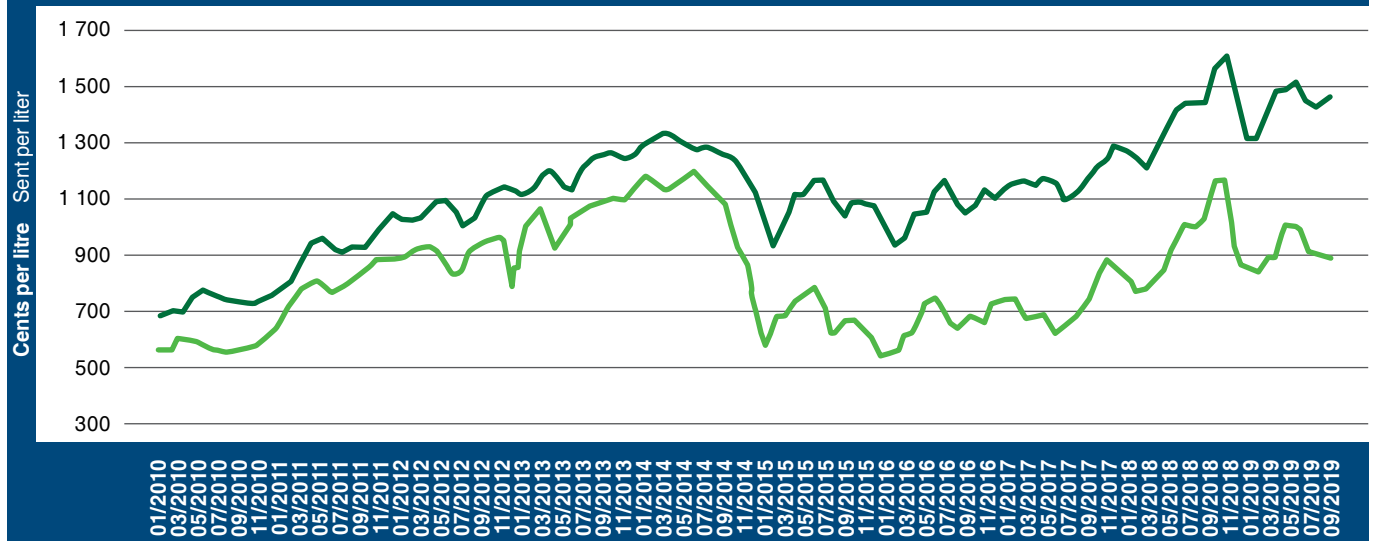
Die dieselbedryf

Die plaaslike groothandelprys van diesel in Gauteng het in die verslagdoeningstydperk met 5,15% vanaf R15,64 per liter in Oktober 2018 tot R14,84 per liter in Oktober 2019 gedaal.

PRYSE

Die faktore wat die plaaslike brandstofprysbewegings beïnvloed, is Brent-ruoliepryse en die rand/dollar-wisselkoers, asook plaaslike brandstofheffings. **Grafiek 5** toon die internasionale prys van Brent-ruolie en die groothandelprys van diesel in Gauteng oor tyd. Oor 'n tydperk van 'n jaar het Brent-ruolie se prys met 22% gedaal – vanaf

GRAPH 5 – International Brent crude oil price and the wholesale price of diesel.
GRAFIEK 5 – Internasionale prys van Brent-ruolie en die groothandelprys van diesel.



International Brent crude oil price (rand per barrel)
 Internasionale Brent-ruolieprys (rand per vat)

Wholesale price of diesel (cents per litre)
 Groothandelprys van diesel (sent per liter)

Source: Grain SA
 Bron: Graan SA

in September 2018 to US\$62,02 per barrel in September 2019. Over the same period, the rand weakened against the dollar from R14,69 to R14,84. The decrease in the Brent crude oil price together with a moderate depreciation of the rand, led to a decrease in the domestic wholesale price of diesel.

The maize price index and the diesel price index are shown in **Graph 6**. Given an expected producer price³ of R2 370 per ton for maize for the coming season and together with minor increases in diesel prices, the ratio between the diesel price and the maize price weakened further.

DIESEL REBATE

The diesel rebate for which producers qualify comprises 40% of the general fuel tax and 100% of the Road Accident Fund levy.

In February 2019 the Minister of Finance announced that the general fuel levy and the Road Accident Fund levy would increase by five cents per litre and 15 cents per litre respectively in April 2019. A further announcement was made regarding a levy on exhaust gases, which meant that the tax on diesel increased by another two cents per litre. This meant that the diesel rebate increased from 321,8 cents per litre to 333,6 cents per litre in April for 80% of legal use. **Graph 7** illustrates how the diesel rebate increased over time.

DIESEL REBATE SYSTEM

The diesel rebate once again received priority attention during this reporting period. Delays in the payment of the diesel rebate and VAT claims caused producers to experience major cash flow problems. Some delays in pay-outs was without reason given by SARS, whilst others were due to audits been done; problems with communication and interpretation of logbook entries. Frequent meetings were held with SARS head office in this regard. During the end of 2018, Grain SA also participated in industry workshops held by SARS and the Treasury to review the current diesel rebate and to create a better functioning diesel rebate system.

Grain SA also designed and participated with Agri SA and SAIT in a questionnaire, where valuable information was obtained that could be taken up with SARS and the Treasury. Frequent discussions were also held with the Tax Ombud to bring problems experienced with delays to his office's attention.

US\$79,13 per vat in September 2018 tot US\$62,02 per vat in September 2019. Oor dieselfde tydperk het die rand vanaf R14,69 tot R14,84 teen die dollar verswak. Die daling in die prys van Brent-ruolie, tesame met 'n matige vermindering in die waarde van die rand, het tot 'n daling in die plaaslike groothandelprys van diesel gelei.

Die mieliëprysindeks en die dieselprijsindeks word in **Grafiek 6** getoon. Gegee 'n verwagte produsenteprys³ van R2 370 per ton vir mielies vir die komende seisoen, en saam met geringe verhogings in dieselprijs, is die verhouding tussen die dieselprijs en die mieliëprijs nog swakker.

DIESEL RABAT

Die dieselrabat waarvoor produsente kwalifiseer, bestaan uit 40% van die algemene brandstofbelasting en 100% van die Padongeluksfondsheffing.

Die Minister van Finansies het in Februarie 2019 aangekondig dat die algemene brandstofheffing en die Padongeluksfondsheffing in April 2019 met vyf sent per liter en 15 sent per liter onderskeidelik gaan toeneem. 'n Verdere aankondiging is gemaak van 'n heffing vir uitlaatgasse, wat meegebring het dat die belasting op diesel met 'n verdere twee sent per liter toegeneem het. Dit alles het meegebring dat die dieselrabat vanaf 321,8 sent per liter na 333,6 sent per liter toegeneem het – vir 80% van regmatige gebruik. **Grafiek 7** toon hoe die dieselrabat oor tyd toegeneem het.

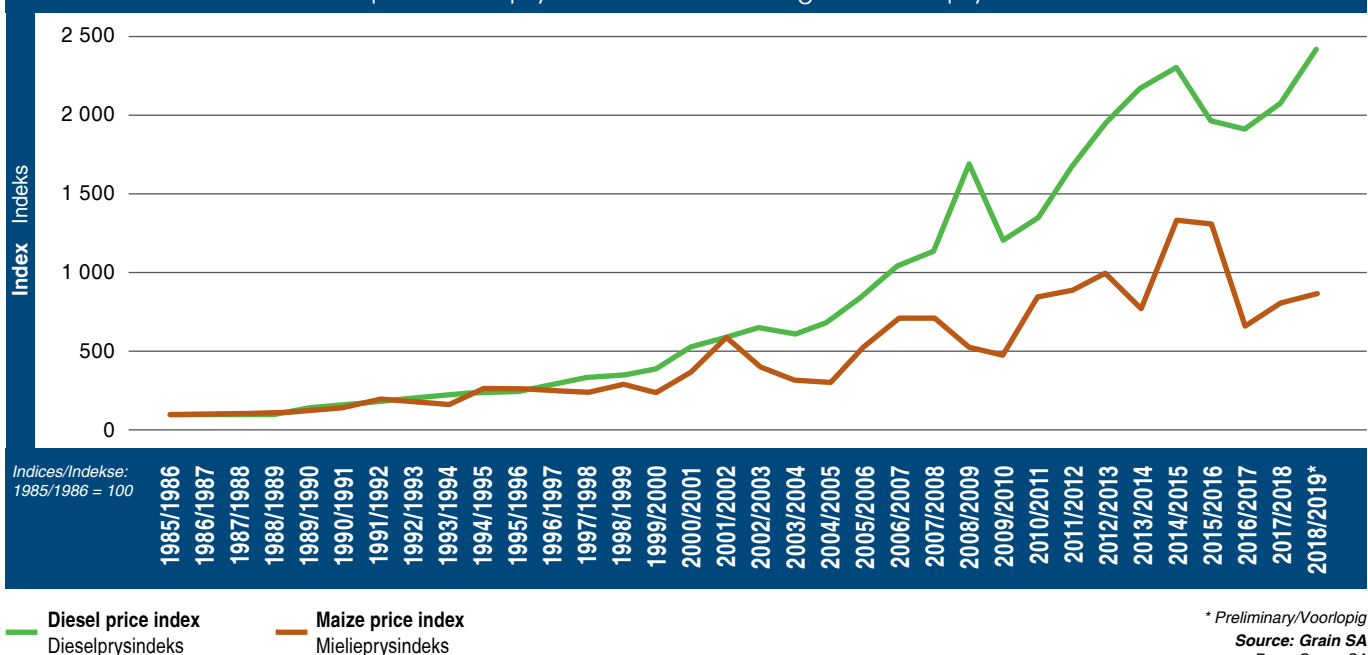
DIESEL RABATSTELSEL

Die dieselrabat het weer eens in hierdie verslagdoeningstydperk prioriteitsaandag ontvang. Vertraginge in die betaling van die dieselrabat en van BTW-eise het veroorsaak dat produsente ernstige kontantvloei-probleme ervaar het. Sekere vertraginge in uitbetalings het voorgekom sonder dat die SAID redes verskaf het, terwyl ander veroorsaak is deur oudits wat uitgevoer is, probleme met kommunikasie en die vertolking van logboekinskrywings. Gereelde vergaderings is met die SAID se hoofkantoor in hierdie verband gehou. Aan die einde van 2018 het Graan SA ook deelgeneem aan bedryfswerkswinkels wat deur die SAID en die Tesourie gehou is om die huidige dieselrabat te hersien en 'n beter-funksionerende dieselrabatstelsel te skep.

Graan SA het saam met Agri SA en SAIT 'n vraelys ontwerp wat waardevolle inligting verkry het wat met die SAID en Tesourie opgevolg kan word. Gereelde gesprekke is ook met die Belastingombud gevoer om probleme wat met vertraginge ervaar word onder sy kantoor se aandag te bring.

GRAPH 6 – Indices of the producer price of maize and the wholesale price of diesel.

GRAFIEK 6 – Indeks van die produsenteprys van mielies en die groothandelprys van diesel.



³ Average producer price = Safex, July 2020 price - average differential cost - handling costs

³ Gemiddelde produsenteprys = Safex, Julie 2020-prys - gemiddelde differensiële koste - hanteringskoste

The agricultural machinery industry

Due to advanced international technology, South Africa imports most of its agricultural machines, once again making the rand/dollar exchange rate an important factor in pricing. The strengthening of the rand therefore contributes to lower agricultural machinery price trends, while a weaker rand contributes to higher price trends.

PRICES

The prices for agricultural machinery have increased on average by 1,7% from August 2018 to August 2019, and by 2,0% from September 2018 to September 2019. The year-on-year trend with respect to the change in the price is a combination of increases in two classes of agricultural machinery namely tractors and implements and decreases in the other two, namely; combine harvesters and hay and forage equipment on an annual basis are shown in **Table 6**.

Graph 8 (on page 72) compares the price indices of the tractor price and the maize price since 1985/1986. From the graph, it is clear that the price ratio between tractors and the maize price has slowly converged, especially due to lower tractor prices over the past year.

TRACTOR SALES

Graph 9 (on page 72) depicts what is currently happening with tractor sales in the South African market. Note that these figures exclude

Die landboumasjineriebedryf

As gevolg van gevorderde internasionale tegnologie voer Suid-Afrika die meeste van sy landboumasjinerie in, wat weer eens die rand/dollar-wisselkoers 'n belangrike faktor in prysbepaling maak. Die versterking van die rand dra dus tot laer pryse op landboumasjinerie by, terwyl 'n swakker rand tot hoër pryse bydra.

PRYSE

Die pryse van landboumasjinerie het vanaf Augustus 2018 tot Augustus 2019 gemiddeld met 1,7% gestyg, en vanaf September 2018 tot September 2019 met 2,0%. Die jaar-tot-jaar-tendens ten opsigte van die verandering in die prys is 'n kombinasie van verhogings in twee klasse landboumasjinerie, naamlik trekkers en implemente, en dalings in die ander twee, naamlik stropers en hooi- en voertoerusting, op 'n jaargrondslag en word in **Tabel 6** getoon.

Grafiek 8 (op bladsy 72) vergelyk die indekse van die trekkerprys en die mielieprys sedert 1985/1986. Uit die grafiek is dit duidelik dat die prysverhouding tussen trekkers en mielies stadig nader aan mekaar beweeg het, veral as gevolg van laer trekkerpryse die afgelope jaar.

TREKKERVERKOPE

Grafiek 9 (op bladsy 72) verteenwoordig wat tans in die Suid-Afrikaanse mark met trekerverkope gebeur. Let op dat hierdie syfers uitvoere

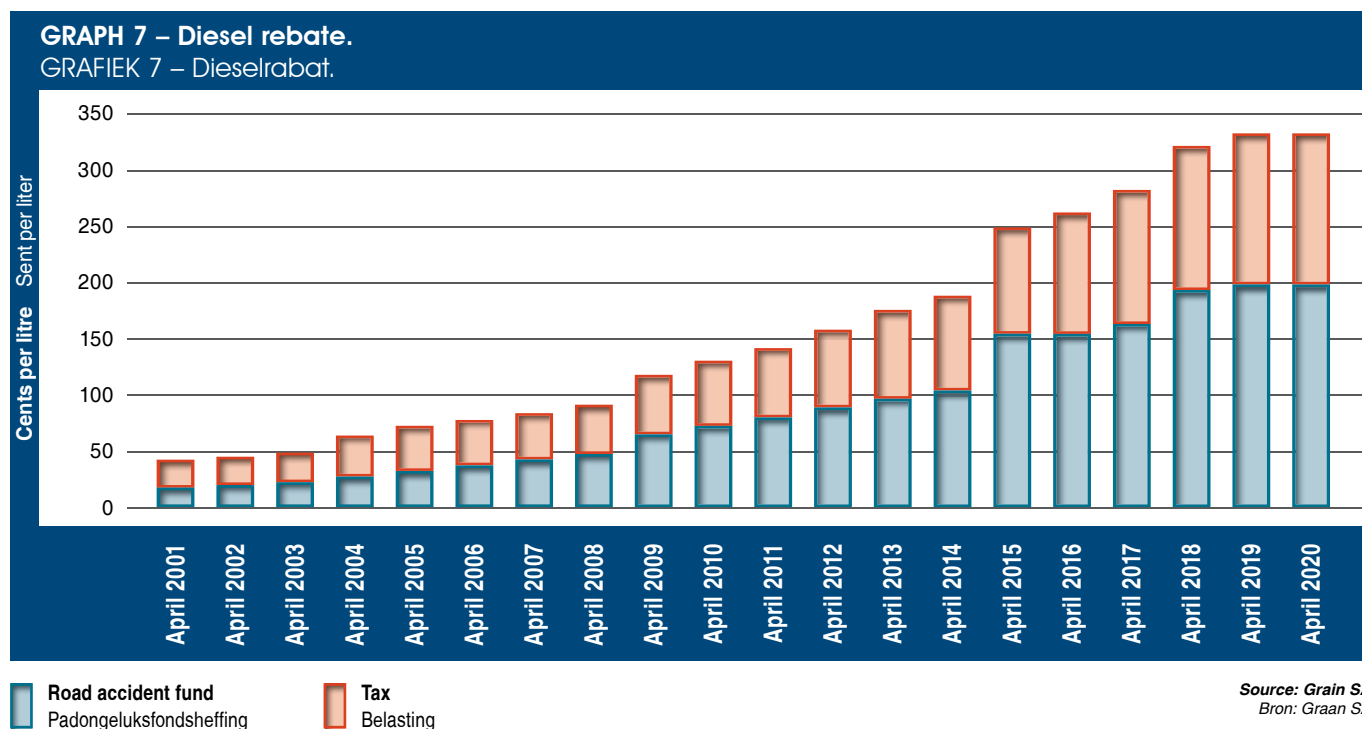


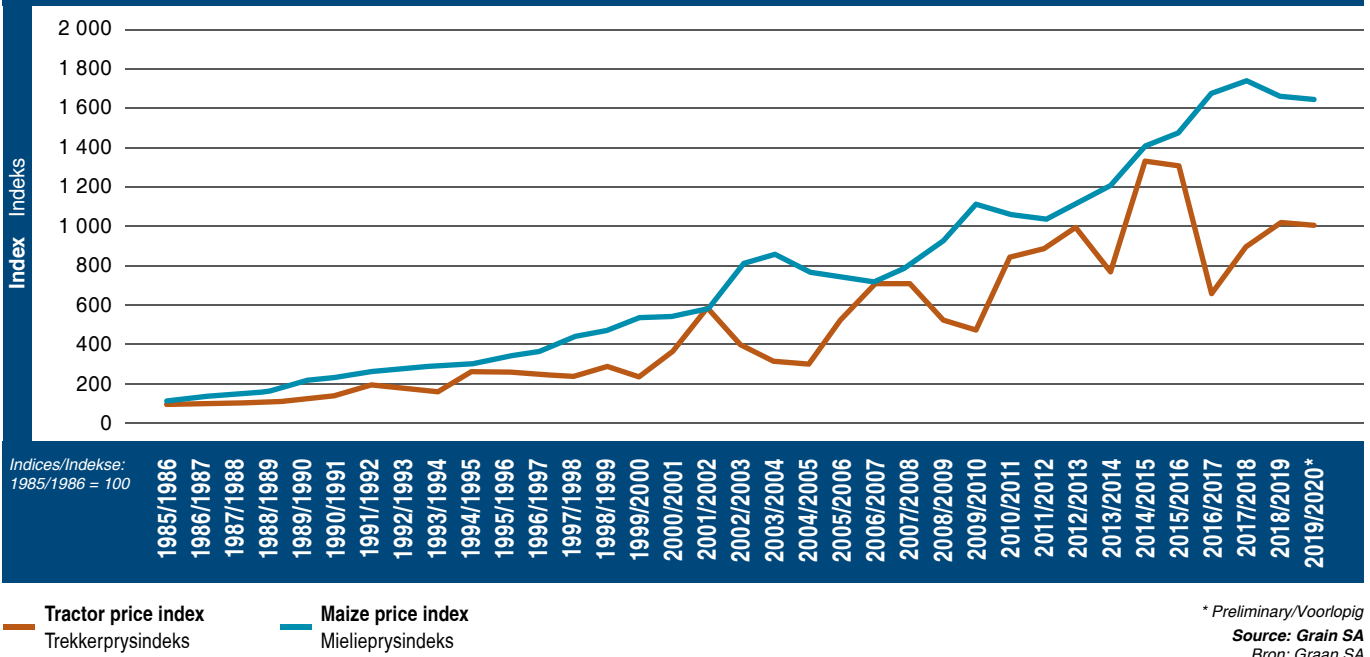
TABLE 6 – Price changes in agricultural machinery equipment.			
TABEL 6 – Prysveranderings in landboumasjinerietoerusting.			
EQUIPMENT CLASS	YEAR-ON-YEAR CHANGE %		TREND
	August 2019	September 2019	
Tractors	+1,5	+2,3	Up
Combine harvesters	-4,4	-4,2	Down
Hay and forage equipment	0,0	-0,3	Down
Implements	+1,2	+1,2	No change
General	+1,7	+2,0	Up

TOERUSTINGKLAS	JAAR-TOT-JAAR-VERANDERING %		TENDENS
	Augustus 2019	September 2019	
Trekkers	+1,5	+2,3	Opwaarts
Stropers	-4,4	-4,2	Afwaarts
Hooi- en veevoertoerusting	0,0	-0,3	Afwaarts
Implemente	+1,2	+1,2	Geen verandering
Algemeen	+1,7	+2,0	Opwaarts

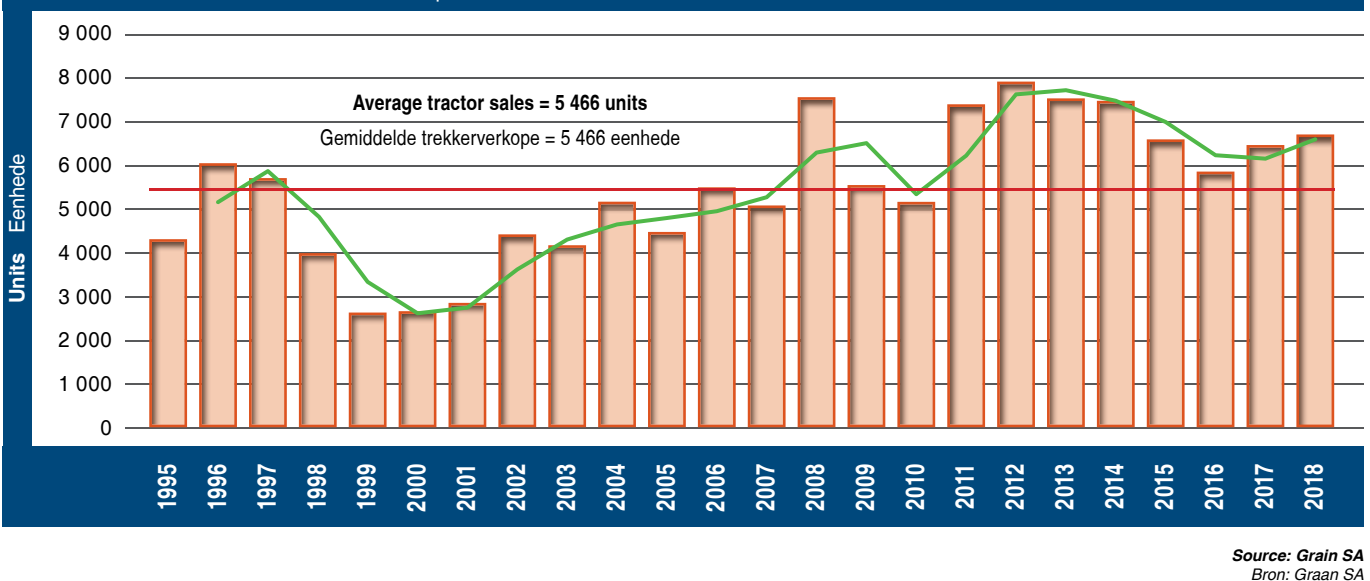
Source: AGFACTS

Bron: AGFACTS

GRAPH 8 – Indices for the producer price for maize and the prices of tractors.
GRAFIEK 8 – Indekse van die produsenteprys van mielies en die prys van trekkers.



GRAPH 9 – Annual tractor sales.
GRAFIEK 9 – Jaarlikse trekkerverkope.



exports and include only local sales. Annual tractor sales during this period (1995 - 2018) varied between a minimum of 2 624 units in 1999 and a maximum of 7 899 units in 2012. Between 2017 and 2018, tractor sales increased by 4%, from 6 462 units in 2017 to 6 714 units in 2018.

TRACTOR FLEET

Currently, the country's tractor fleet consists of 88 156 units (**Graph 10**). There has been a notable decrease in the size of the tractor fleet over the years and the main reason for that is the smaller summer and winter grain plantings over time, as well as the increased sales of bigger than average-sized (kW) tractors.

uitsluit, en slegs plaaslike verkope insluit. Jaarlikse trekkerverkope in hierdie tydperk (1995 - 2018) het tussen 'n minimum van 2 624 eenhede in 1999 en 'n maksimum van 7 899 eenhede in 2012 gewissel. Tussen 2017 en 2018 het trekkerverkope met 4% gestyg – vanaf 6 462 eenhede in 2017 tot 6 714 eenhede in 2018.

TREKKERVLOOT

Die land se trekkervloot bestaan tans uit 88 156 eenhede (**Grafiek 10**). Daar was 'n merkbare afname in die grootte van die trekkervloot met verloop van tyd, en die hoofrede hiervoor is die kleiner somer- en wintergraanaanplantings oor tyd, asook die groter verkope van groter as gemiddelde (kW) trekkers.

TRACTOR AGE

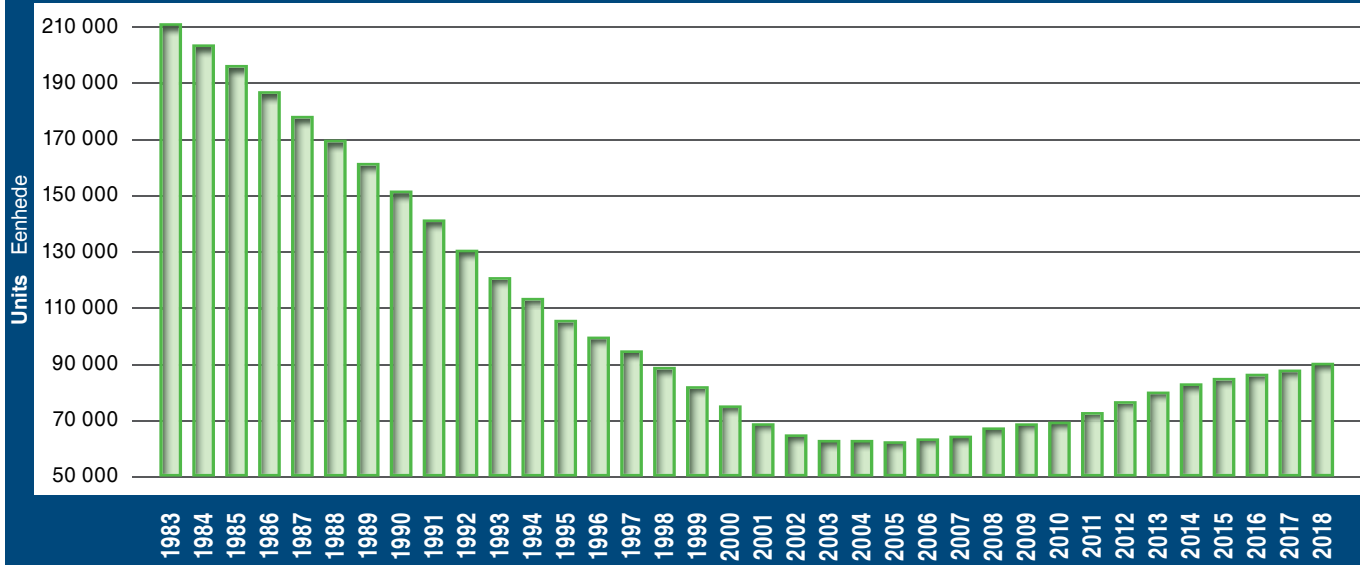
- ▶ The average age of tractors in the tractor fleet is currently seven years. **Graph 11** indicates the trend in the distribution of age in the tractor fleet.
- ▶ The total number of tractors younger than ten years is currently about 61 900 units, which constitutes 68% of the current tractor fleet. The percentage of tractors younger than ten years was at a low in 1993, when 35,8% of the tractor fleet was younger than ten years. In 1995 the total number of tractors younger than ten years constituted 36,7% of the fleet, after which the size of the tractor fleet younger than ten years started growing more and more.

TREKKEROUDERDOM

- ▶ Die gemiddelde ouderdom van trekkers in die trekkervloot is tans sewe jaar. **Grafiek 11** toon die tendens in die ouderdomsverspreiding van die trekkervloot.
- ▶ Die totale getal trekkers jonger as tien jaar, is tans ongeveer 61 900 eenhede, oftewel 68% van die huidige trekkervloot. Die persentasie trekkers jonger as tien jaar was op 'n laagtepunt in 1993, toe 35,8% van die trekkervloot jonger as tien jaar was. In 1995 het die totale trekkers jonger as tien jaar 36,7% van die vloot uitgemaak, waarna die grootte van die trekkervloot jonger as tien jaar toenemend begin groei het.

GRAPH 10 – Total tractor fleet.

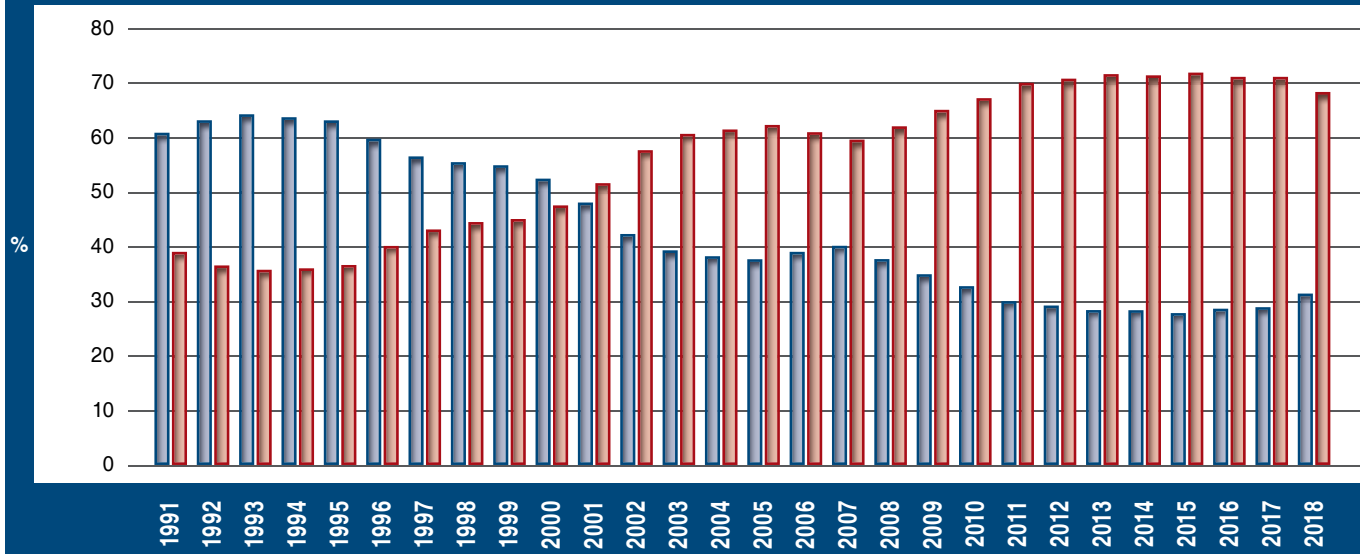
GRAFIEK 10 – Totale trekkervloot.



Source: Grain SA
Bron: Graan SA

GRAPH 11 – Average age of the tractor fleet.

GRAFIEK 11 – Gemiddelde ouderdom van die trekkervloot.



Older than ten years
Ouer as tien jaar

Younger than ten years
Jonger as tien jaar

Source: Grain SA
Bron: Graan SA

ANNUAL MEETING WITH SAAMA

In 2019, Grain SA again met with the South African Agricultural Machinery Association (SAAMA) to discuss mutual challenges in the grain and oilseed industries. Important issues discussed were the following:

- ▶ Market trends and production costs for the grain and oilseed industry.
- ▶ Trends in the international and local agricultural machinery industry.
- ▶ Logistics of agricultural machinery that cannot be licenced.
- ▶ Import rebate on tractor tyres.
- ▶ Precision support.
- ▶ Diesel fuel quality.
- ▶ Technology platforms.
- ▶ Grey imports.

PRODUCTION COST OVERVIEW

Actual production cost

Grain SA collected/bought data and information during December 2018 and January 2019 to determine the major maize production area's actual income and production costs for the 2017/2018 production season. Determining and gathering the historic actual income and production cost figures is important to the industry as it identifies the actual figures paid for different items and the profitability of a crop.

Graph 12 to 15 depict the long-term actual production cost, yields and profit/loss situation of the North West Province, North Western Free State, Eastern Free State and KwaZulu-Natal since 2000/2001. The figures clearly show that production costs are constantly increasing over time. These increases on a year-on-year basis are fairly high and have a huge impact on producers to adapt and make adjustments with their current production systems in order to plant maize profitably.

Graph 12 clearly depicts that the North West Province experienced very trying production conditions as poor yields were achieved during the 2012/2013, 2014/2015 and 2015/2016 seasons. This region in general experienced very cumbersome conditions putting pressure on profitable maize production. Better yields were obtained

JAARLIKSE VERGADERING MET SALMA

Graan SA het in 2019 weer met die SA Landboumasjinerieassosiasie (SALMA) vergader om gemeenskaplike uitdagings in die graan- en oliesadebedryf te bespreek. Belangrike kwessies wat bespreek is, was die volgende:

- ▶ Markttendense en produksiekoste vir die graan- en oliesadebedryf.
- ▶ Tendense in die internasionale en plaaslike landboumasjineriebedryf.
- ▶ Logistiek van landboumasjinerie wat nie gelisensieer kan word nie.
- ▶ Invoerrabat op trekkebande.
- ▶ Presisie-ondersteuning.
- ▶ Gehalte van diesel.
- ▶ Tegnologieplatforms.
- ▶ Grys invoere.

PRODUKSIEKOSTE-OORSIG

Werklike produksiekoste

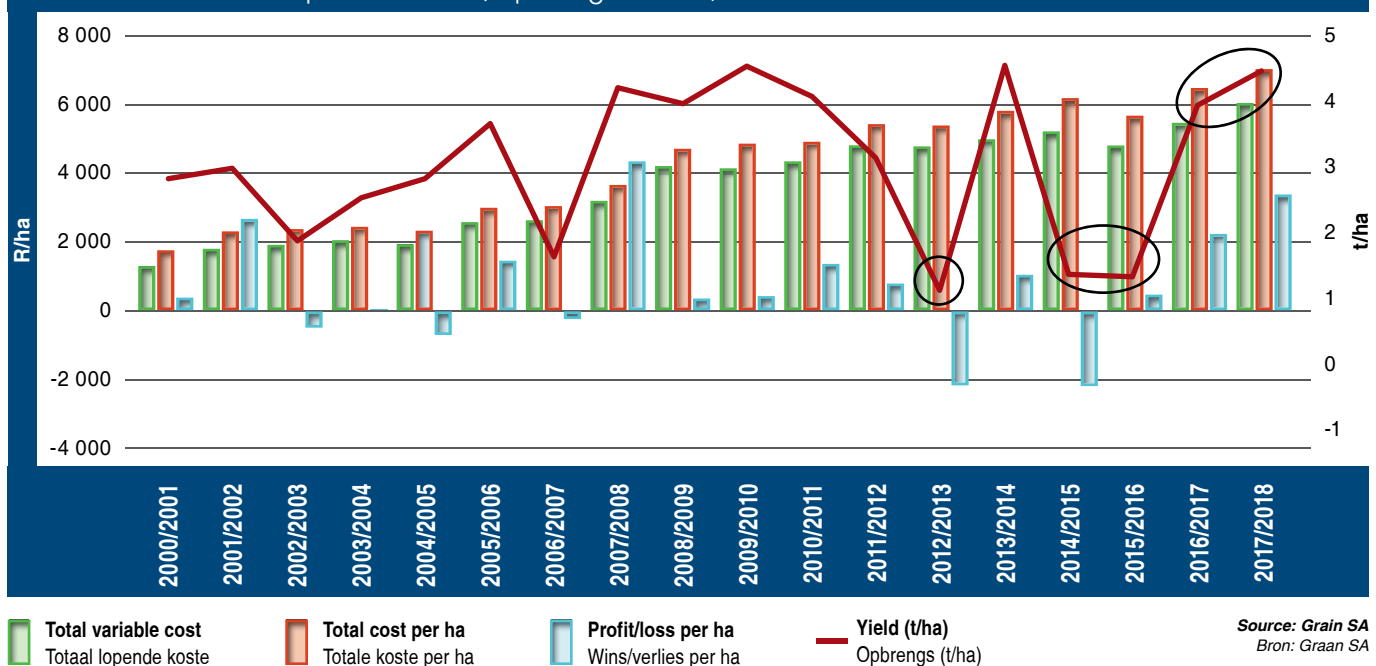
Graan SA het in Desember 2018 en Januarie 2019 data en inligting ingesamel/gekoop om die werklike inkomste en produksiekoste van die belangrikste mielieproduksiegebiede vir die 2017/2018-produksieseisoen te bepaal. Dit is vir die bedryf belangrik dat die historiese werklike inkomste en produksiekostesifers bepaal en ingesamel word, aangesien dit 'n aanduiding gee van die werklike koste van verskillende items en die winsgewendheid van 'n gewas.

Grafiek 12 tot 15 beeld die langtermyn- werklike produksiekoste, opbrengs en wins/verlies-situasie vir Noordwes, die Noordwes-Vrystaat, Oos-Vrystaat en KwaZulu-Natal sedert 2000/2001 uit. Dit is duidelik dat produksiekoste met verloop van tyd voortdurend styg. Hierdie stygings op 'n jaar-tot-jaar-grondslag is redelik hoog en het 'n geweldige impak op produsente se vermoë om hulle huidige produksiestelsels aan te pas en te wysig om mielies winsgewend te plant.

Grafiek 12 toon duidelik dat Noordwes baie moeilike produksietoestande ervaar het, aangesien swak opbrengste gedurende die 2012/2013-, 2014/2015- en 2015/2016-seisoen behaal is. Hierdie streek het oor die algemeen baie moeilike toestande ervaar, wat druk op winsgewende mielieproduksie geplaas het. Beter opbrengste is die

GRAPH 12 – Actual production cost, yield and profit/loss of maize for the North West.

GRAFIEK 12 – Werklike produksiekoste, opbrengs en wins/verlies van mielies in Noordwes.



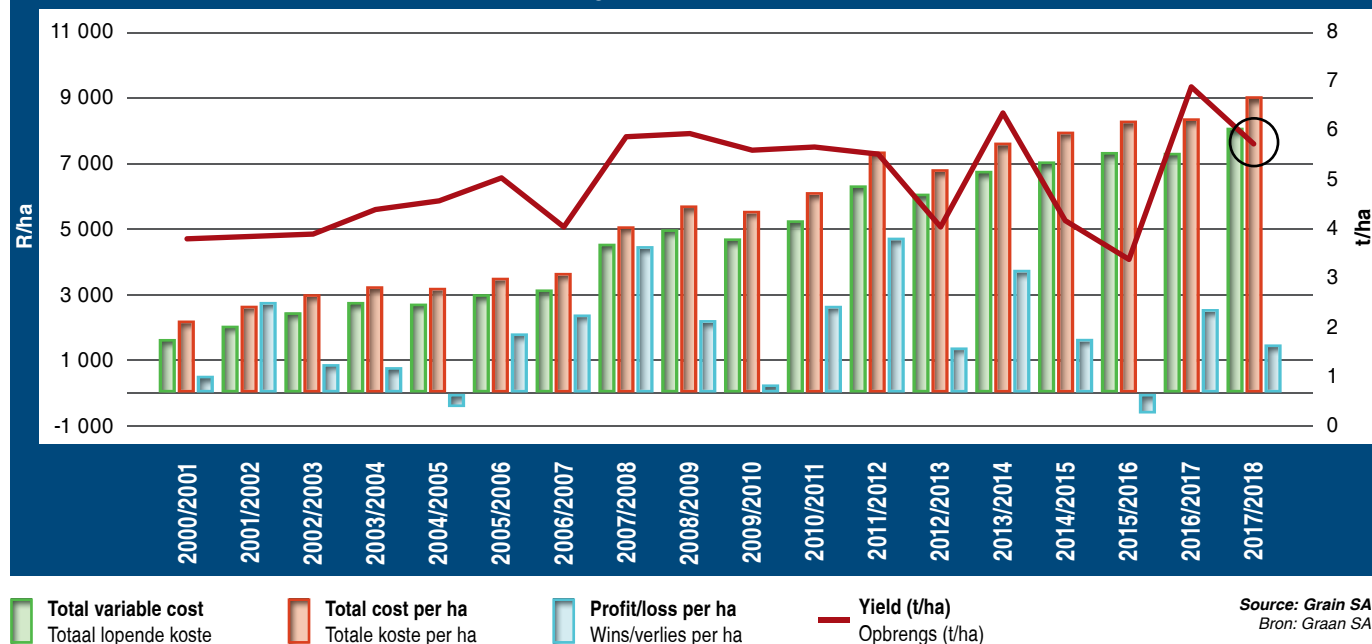
for the North West Province the last two seasons (2016/2017 and 2017/2018) compared to the previous drought year (2015/2016).

The difference in yields between the past contrasting climatic seasons is evident in all the graphs. **Graph 12** shows that the 2015/2016 production season's drought was very intense and had a big impact on yield compared to the 2016/2017 yields where very good yields were achieved due to favourable climatic conditions. South Africa produced its lowest volume of maize, apart from the 2006/2007 season, during the 2015/2016 production season whereas a record maize crop was obtained the following year (2016/2017).

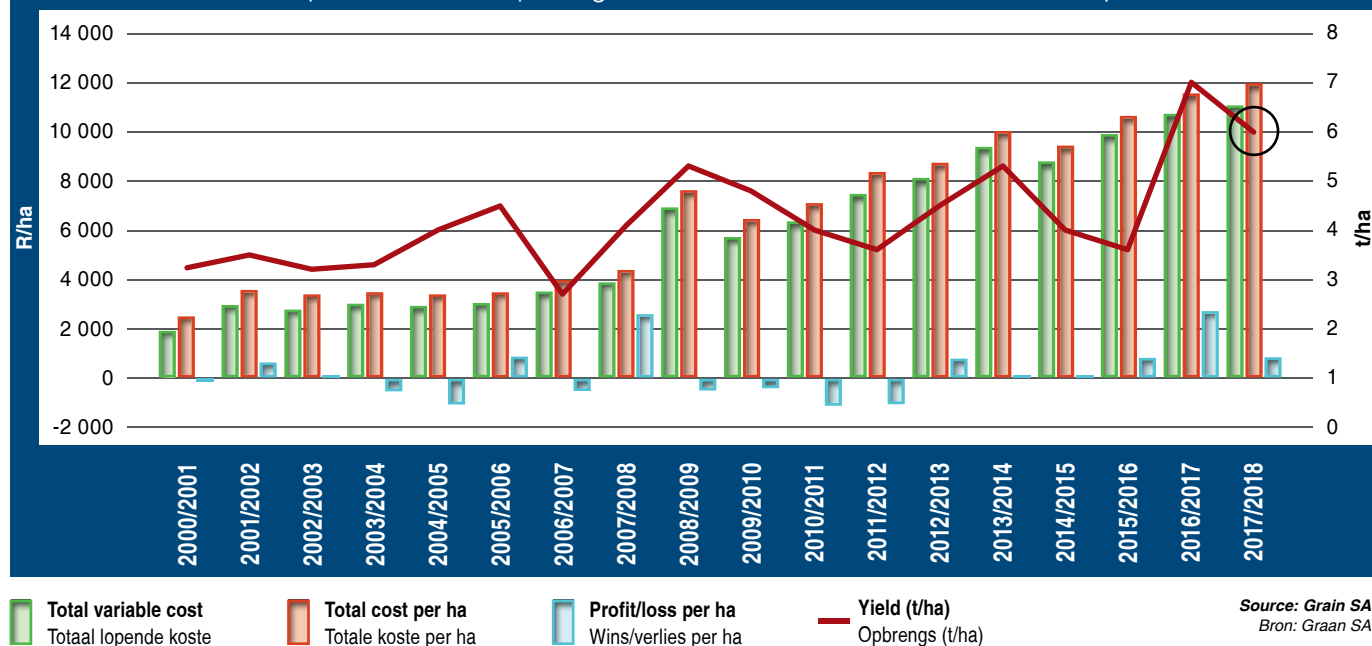
afgelepe twee seisoene (2016/2017 en 2017/2018) in Noordwes behaal vergeleke met die vorige droogtejaar (2015/2016).

Die verskil in opbrengste tussen die kontrasterende klimaatseisoene in die verlede is duidelik uit al die grafieke. **Grafiek 12** toon dat die 2015/2016-produksieseisoen se droogte baie erg was en 'n groot impak op opbrengs gehad het, vergeleke met die 2016/2017-opbrengste, toe baie goeie opbrengste as gevolg van gunstige klimaatstoestande behaal is. Buiten die 2006/2007-seisoen, het Suid-Afrika sy laagste volume mielies tydens die 2015/2016-produksieseisoen behaal, terwyl 'n rekordmielieoes in die volgende jaar (2016/2017) behaal is.

GRAPH 13 – Actual production cost, yield and profit/loss of maize for the North Western Free State.
GRAFIEK 13 – Werklike produksiekoste, opbrengs en wins/verlies van mielies in die Noordwes-Vrystaat.

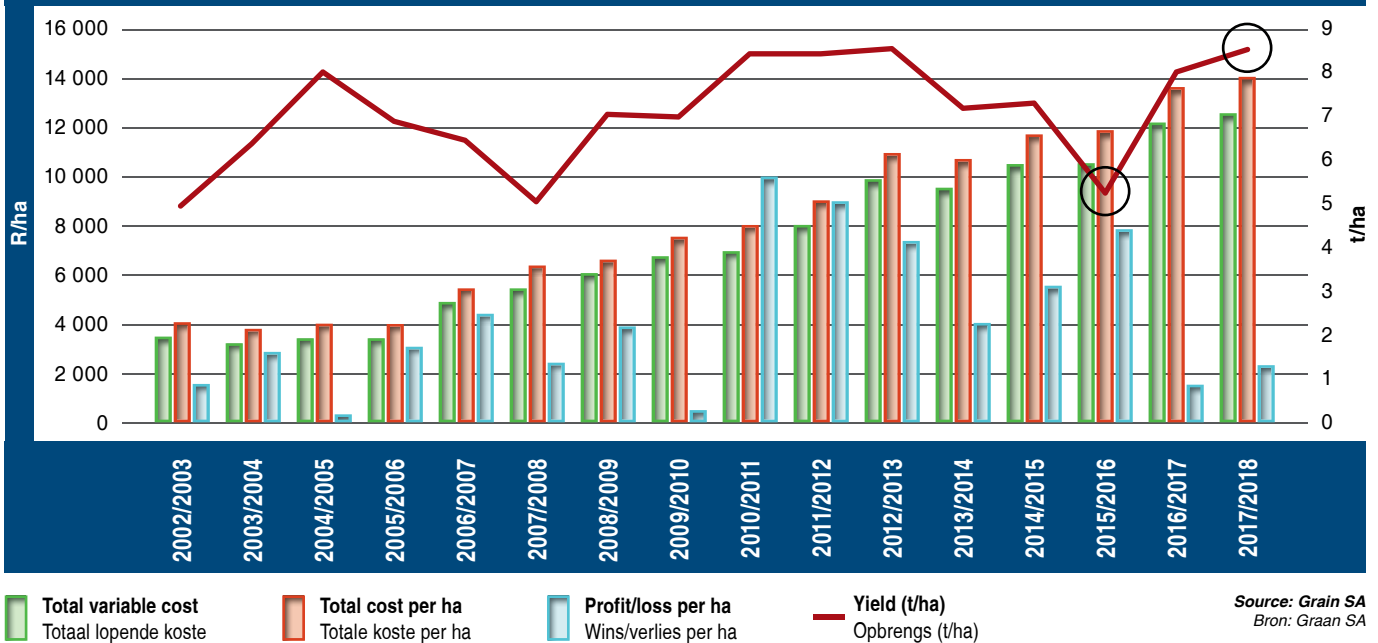


GRAPH 14 – Actual production cost, yield and profit/loss of maize for the Eastern Free State.
GRAFIEK 14 – Werklike produksiekoste, opbrengs en wins/verlies van mielies in die Oos-Vrystaat.



GRAPH 15 – Actual production cost, yield and profit/loss of maize for KwaZulu-Natal.

GRAFIEK 15 – Werklike produksiekoste, opbrengs en wins/verlies van mielies in KwaZulu-Natal.



Source: Grain SA
Bron: Graan SA

Contribution of different variable input cost items to the total variable input cost of maize

The main focus of this section is to express different variable input cost items as a percentage of the total variable input costs.

NORTH WESTERN FREE STATE

Graph 16 shows the average percentage contribution of selected variable input costs during two different seasons with maize production in the North Western Free State. Fertiliser and lime, which are the biggest contributing inputs for a maize producer, contributed a calculated 30% during the 2010/2011 season and increased to 33,2% to the total variable input cost seven seasons later.

Fuel contributed 13% to the total variable input cost during the 2010/2011 season. The decrease in fuel usage is evident as the latest information indicates a contribution of 11,4%; this is due to the change in producer's production practises. Repairs and parts contributed 9,0% and showed a declining trend in terms of its relative contribution to the total variable input cost. Seed cost showed an increase in its relative contribution to the total variable input cost, while the cost for chemical control also increased from 7% during 2010/2011 to 9,5% in 2017/2018 of the total variable input cost. This is simply to illustrate the type of long-term information that is gathered through this project.

KWAZULU-NATAL

Graph 17 shows the same information as the above but only for KwaZulu-Natal. Fertiliser and lime contributed a calculated 31% during the 2010/2011 season but slightly decreased to 30% of the total variable input cost seven seasons later.

Seed cost is the second biggest contributing input of a maize producer in the eastern parts of the country, contributing a calculated 18% during the 2017/2018 season. Chemical control contributed 14% to the total variable input cost during 2010/2011 but decreased to 12% seven years later.

BUDGETED INCOME AND PRODUCTION COST FIGURES FOR MAIZE (2019/2020 PRODUCTION SEASON)

With the 2019/2020 season approaching, it is once again time to make some calculations. The analysis of gross margins is a common and

Bydrae van verskillende veranderlike-insetkoste-items tot die totale veranderlike insetkoste van mielies

Die vernaamste fokus van hierdie afdeling is om verskillende veranderlike-insetkoste-items as 'n persentasie van die totale veranderlike insetkoste uit te druk.

NOORDWES-VRYSTAAT

Grafiek 16 toon die gemiddelde persentasiebydrae van geselekteerde veranderlike insetkoste tot mielieproduksie in die Noordwes-Vrystaat tydens twee verskillende seisoene. Kunsmis en kalk, wat die grootste bydraende insette vir 'n mielieprodusent is, het in die 2010/2011-seisoen 'n berekende 30% bygedra, en dit het sewe seisoene later tot 33,2% van die totale veranderlike insetkoste toegeneem.

Brandstof het in die 2010/2011-seisoen 13% tot die veranderlike insetkoste bygedra. Die daling in brandstofverbruik is duidelik, aangesien die jongste inligting as gevolg van die verandering in produsente se produksiepraktyke op 'n bydrae van 11,4% dui. Herstelwerk en onderdele het 9,0% bygedra en 'n dalende tendens ten opsigte van die relatiewe bydrae tot die totale veranderlike insetkoste getoon. Saadkoste het 'n styging in die relatiewe bydrae tot die totale veranderlike insetkoste getoon, terwyl die koste vir chemiese beheer ook vanaf 7% van die totale veranderlike insetkoste in 2010/2011 tot 9,5% in 2017/2018 gestyg het. Dit illustreer die tipe langtermyninligting wat met behulp van hierdie projek ingesamel word.

KWAZULU-NATAL

Grafiek 17 toon dieselfde inligting as hierbo, maar net vir KwaZulu-Natal. Kunsmis en kalk het in die 2010/2011-seisoen 'n berekende 31% bygedra, en dit het sewe seisoene later effens tot 30% van die totale veranderlike insetkoste gedaal.

Saadkoste is die tweede grootste bydraende inset vir 'n mielieprodusent in die oostelike dele van die land en het in die 2017/2018-seisoen 'n berekende 18% bygedra. Chemiese beheer het in 2010/2011 14% tot die veranderlike insetkoste bygedra, maar dit het sewe jaar later tot 12% gedaal.

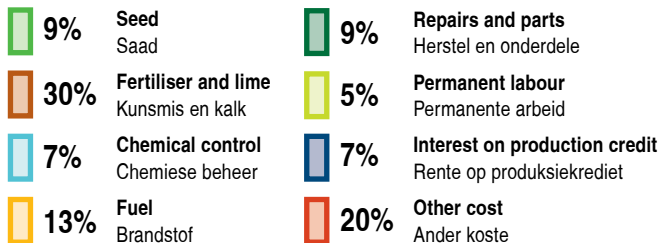
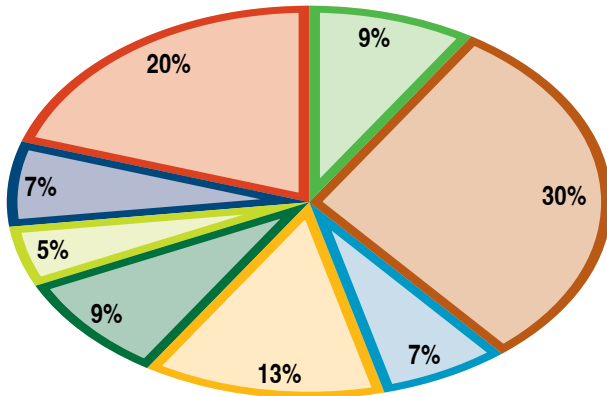
BEGROTE INKOMSTE- EN PRODUKSIEKOSTESYFERS VIR MIELIES (2019/2020-PRODUKSIESEISOEN)

Met die 2019/2020-seisoen wat naderkom, is dit weer eens tyd om berekeninge te doen. Die ontleding van bruto marges is 'n algemene

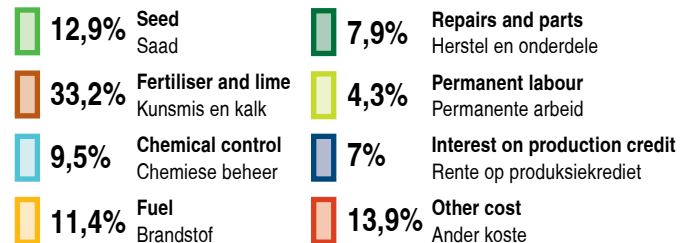
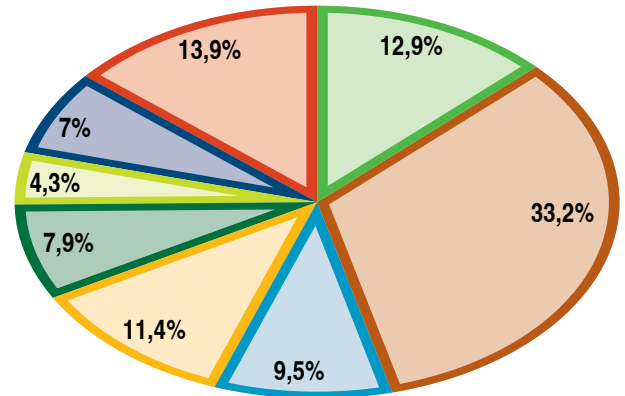
GRAPH 16 – Contribution of different variable input cost items to the total variable input cost of maize for the North Western Free State.

GRAFIEK 16 – Bydrae van verskillende veranderlike-insetkoste-items tot die totale veranderlike insetkoste van mielies in die Noordwes-Vrystaat.

2010/2011 Production season
2010/2011 Produksiesesoen



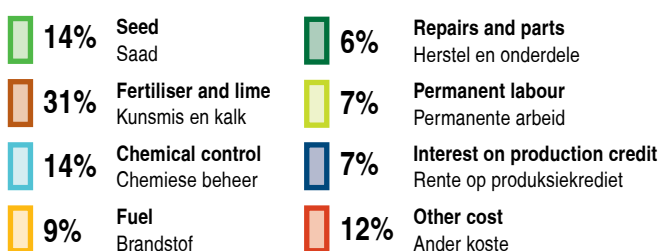
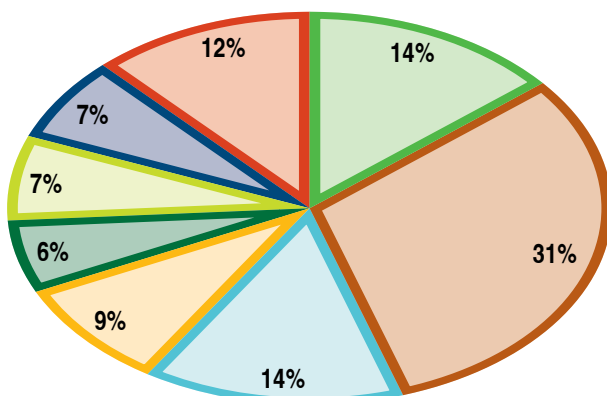
2017/2018 Production season
2017/2018 Produksiesesoen



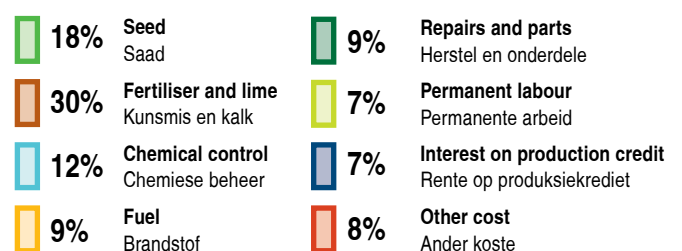
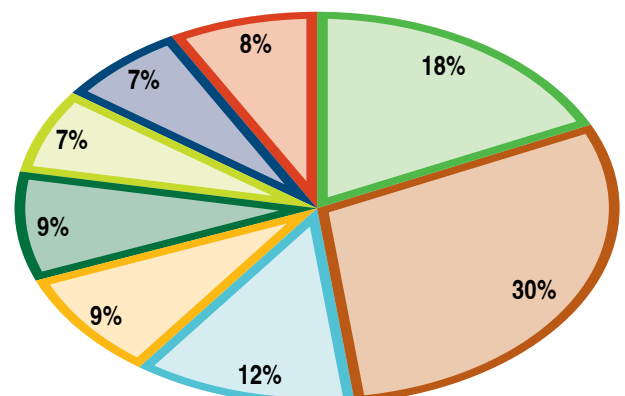
GRAPH 17 – Contribution of different variable input cost items to the total variable input cost of maize for KwaZulu-Natal.

GRAFIEK 17 – Bydrae van verskillende veranderlike-insetkoste-items tot die totale veranderlike insetkoste van mielies in KwaZulu-Natal.

2010/2011 Production season
2010/2011 Produksiesesoen



2017/2018 Production season
2017/2018 Produksiesesoen



popular way of comparing the relative profitability of grains within a farm. This section provides a guideline in terms of the profitability of maize versus sunflower and soybeans. The responsibility still lies with each producer to do his/her own gross margin calculations because production costs radically differ from neighbour to neighbour. This is due to each grain producer's own unique system, the type of farming unit and production practices.

Establishing production budgets prior to planting crops, is becoming increasingly necessary and should not be taken lightly when making production decisions. No one can accurately predict the future with all its risks and uncertainties as it is about plans for the future and is based on forecasts, historical data, assumptions and experience. In light of this, producers, as budget users, should be aware that budgets, as well as the assumptions on which they are based, are constantly subject to change.

The cost structure of the budgets consists of variable and fixed costs. If you do not make use of certain variable costs, one can deduct it from the total variable costs. Although fixed costs vary dramatically from producer to producer, an x-amount is provided to calculate an estimated total production cost.

Forecasting the commodity price for the coming year is extremely difficult. The Safex future contract price used in the calculations are as follows:

- ▶ Maize for delivery in July 2020 = R2 700/ton
- ▶ Sunflower for delivery in May 2020 = R5 120/ton
- ▶ Soybeans for delivery in May 2020 = R5 300/ton

The 2020 futures prices were determined by calculating the average price since the beginning of trading for that particular contract month. Based on the location differential, handling costs and marketing commission, a producer price was calculated.

Maize prices are currently supported by relatively low local production as well as an increase in international prices that support local prices. It is important to note that the maize prices, which have been trading at relatively higher levels in the past year, can motivate producers locally to plant more maize. However, the greatest risk for the coming season will be the weather conditions that will determine the plantings for the season. If the weather conditions are fairly normal and the planting takes place normally, there may again be a greater downward commodity price risk in the coming season.

An illustration of the maize budgets and their performance against other crops are shown in **Table 7** to **9**. The yield scenarios were based on

en gewilde manier om die relatiewe winsgewendheid van graan op 'n plaas te vergelyk. Hierdie afdeling verskaf 'n riglyn ten opsigte van die winsgewendheid van mielies teenoor sonneblom en sojabone. Die verantwoordelikheid lê steeds by elke produsent om hulle eie bruto marge te bereken, aangesien produksiekoste drasties van een buurman tot die volgende een verskil. Dit is toe te skryf aan elke graanprodusent se unieke stelsel, die tipe boerdery-eenheid en produksiepraktyke.

Dit word toenemend nodig om produksiebegrotings op te stel voordat gewasse geplant word, en moenie ligtelik opgeneem word wanneer produksiebesluite geneem word nie. Niemand kan die toekoms met al sy risiko's en onsekerhede akkuraat voorspel nie, aangesien dit oor planne vir die toekoms gaan en op voorspellings, historiese data, aannames en ervaring gegrond is. In die lig hiervan moet produsente as die gebruikers van begrotings daarvan bewus wees dat begrotings, sowel as die aannames waarop dit gegrond is, voortdurend verander.

Die kostestruktuur van die begroting bestaan uit veranderlike en vaste koste. As sekere veranderlike koste nie gebruik word nie, kan dit van die totale veranderlike koste afgetrek word. Hoewel vaste koste dramaties van een produsent tot die volgende verskil, word 'n x-bedrag verskaf om 'n geraamde totale produksiekoste te bereken.

Dit is uiters moeilik om die kommoditeitsprys vir die komende jaar te voorspel. Die Safex-termynkontrakprys wat in die berekenings gebruik word, is soos volg:

- ▶ Mielies vir lewering in Julie 2020 = R2 700/ton
- ▶ Sonneblom vir lewering in Mei 2020 = R5 120/ton
- ▶ Sojabone vir lewering in Mei 2020 = R5 300/ton

Die 2020-termynkontrakpryse is bepaal deur die gemiddelde prys sedert die begin van verhandeling vir daardie spesifieke kontrakmaand te bereken. 'n Produsenteprys is aan die hand van die liggingsdifferensiaal, hanteringskoste en bemarkingskommissie bereken.

Mieliepryse word tans ondersteun deur relatief lae plaaslike produksie, asook 'n styging in internasionale pryse, wat plaaslike pryse ondersteun. Dit is belangrik om daarop te let dat die mieliepryse, wat die afgelope jaar op relatief hoër vlakke verhandel, plaaslike produsente kan motiveer om meer mielies aan te plant. Die grootste risiko vir die komende seisoen sal egter die weerstoestand wees, wat die aanplantings vir die seisoen sal bepaal. Indien die weerstoestand redelik normaal is en die aanplanting normaal plaasvind, kan daar in die komende seisoen weer 'n groter afwaartse kommoditeitsprysrisiko inhou.

'n Illustrasie van die mieliebegrotings en hulle prestasie teen ander gewasse word in **Tabel 7** tot **9** getoon. Die opbrengsskenario's is op aannames

GRAPH 18 – Margin comparison for summer grain crops in the North West Province and North West Central Free State for the 2019/2020 season.

GRAFIEK 18 – Margevergeliking vir somergraangewasse in Noordwes en die Noordwes-Sentraal-Vrystaat vir die 2019/2020-seisoen.

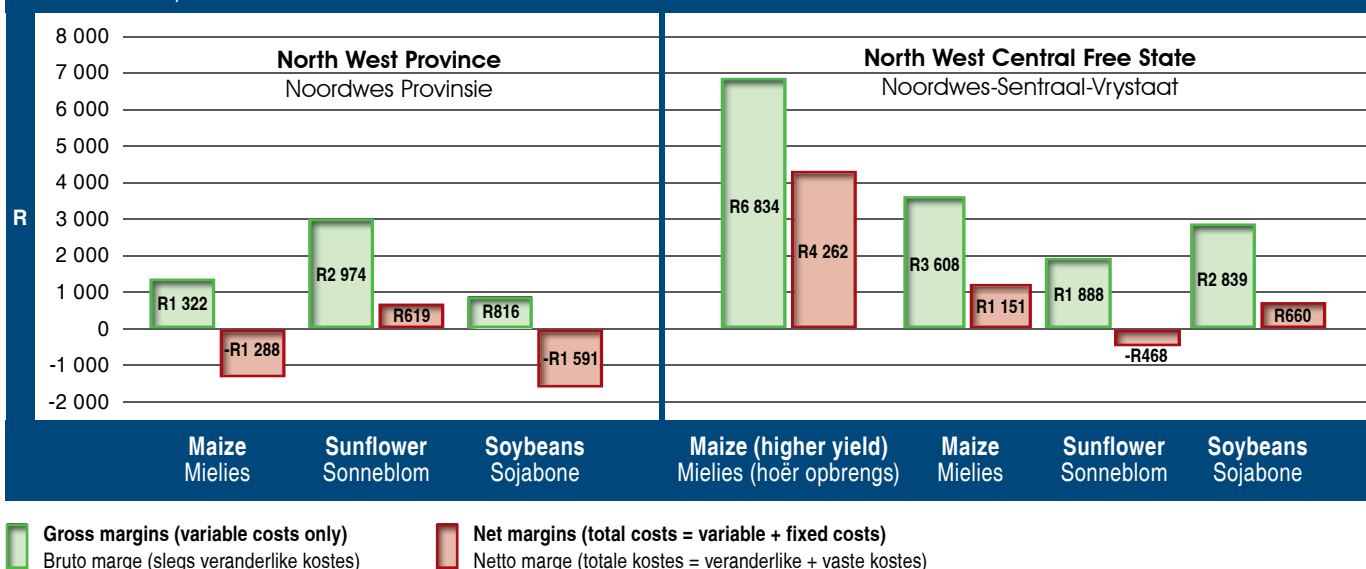


TABLE 7 – Comparison of production cost budgets for summer grain for the 2019/2020 season (western region).
TABEL 7 – Vergelyking van produksiekostebegrotings vir somergraan vir die 2019/2020-seisoen (westelike streke).

NORTH WEST PROVINCE NOORDWES PROVINSIE				NORTH WEST CENTRAL FREE STATE NOORDWES-SENTRAAL-VRYSTAAT			
	Maize Mielies	Sunflower Sonneblom	Soybeans Sojabone	Maize (higher yield) Mielies (hoër opbrengs)	Maize Mielies	Sunflower Sonneblom	Soybeans Sojabone
1. Income/Inkomste							
Planned yield/Beplande opbrengs (t/ha)	3,50	1,50	1,25	6,50	4,50	1,50	1,75
Safex price (best grade)/Safex-prys (beste graad) (R/ton)	R2 700	R5 120	R5 300	R2 700	R2 700	R5 120	R5 300
Deductions/Aftrekkings (R/ton)	R260	R295	R128	R280	R280	R323	R128
Producer price/Produsenteprys (R/ton)	R2 440	R4 825	R5 172	R2 420	R2 420	R4 797	R5 172
Gross income/Bruto inkomste (R/ha)	R8 540	R7 238	R6 465	R15 730	R10 890	R7 196	R9 051
2. Variable costs/Veranderlike kostes							
Seed/Saad	R968	R462	R695	R1 252	R1 129	R528	R773
Fertiliser/Kunsmis	R1 756	R1 016	R1 259	R2 957	R2 047	R1 256	R1 071
Lime/Kalk	R167	R167	R167	R147	R147	R147	R 47
Fuel/Brandstof	R1 092	R916	R858	R1 020	R1 064	R1 078	R1 058
Repairs/Reparasie	R662	R730	R626	R679	R666	R613	R685
Herbicides/Onkruidodders	R837	R181	R582	R796	R682	R474	R407
Pesticides/Plaagdoder	R305	R26	R122	R192	R108	R219	R475
Input insurance/Insetversekering	R384	R141	R128	R307	R212	R164	R179
Grain price hedging/Graanprysverskansing	R518	R199	R244	R644	R527	R239	R268
Crop insurance/Oesversekering	R152	R203	R674	R439	R319	R324	R825
Production credit interest/ Produksiekrediet-rente	R376	R222	R294	R464	R380	R266	R324
Total variable costs/Totale veranderlike koste (R/ha)	R7 218	R4 263	R5 649	R8 896	R7 282	R5 307	R6 212
Total fixed costs/Totale vaste koste (R/ha)	R2 611	R2 355	R2 407	R2 572	R2 457	R2 356	R2 179
Total costs/Totale koste (R/ha)	R9 828	R6 618	R8 056	R11 468	R9 739	R7 664	R8 391
3. Gross margin/Bruto marge (R/ha)	R1 322	R2 974	R816	R6 834	R3 608	R1 888	R2 839
4. Net margin/Netto marge (R/ha)	-R1 288	R619	-R1 591	R4 262	R1 151	-R468	R660
Breakeven (variable costs only)/Gelykbreek (slegs veranderlike koste)							
Yield/Opbrengs (t/ha)	2,96	0,88	1,09	3,68	3,01	1,11	1,20
Safex price/Safex-prys (R/ha)	2 322	3 137	4 647	1 649	1 898	3 861	3 678
Breakeven (variable + fixed cost)/Gelykbreek (veranderlike + vaste koste)							
Yield/Opbrengs (t/ha)	4,03	1,37	1,56	4,74	4,02	1,60	1,62
Safex price/Safex-prys (R/ha)	3 068	4 707	6 573	2 044	2 444	5 432	4 923

assumptions for production conditions in different regions. These tables are compiled to show an indication of the difference in profitability between the various summer crops, but it is important to note that these figures may vary from producer to producer.

WESTERN PARTS OF THE COUNTRY

The compiled maize budgets and their performance against other crops are shown in **Table 7**. The yield scenarios were based on assumptions for production conditions in the western parts of the country (North West Province and North West Central Free State). This figure is compiled to show an indication of the difference in profitability between the various summer crops (maize, sunflower, soybeans), but it is important to note that these figures may vary from producer to producer.

While **Table 7** shows estimated production costs for the North West Province and North West Central Free State, **Graph 18** again illustrates the gross and net margin situation. Sunflower production was under severe pressure this past season due to diseases that had a very

vir produksietoestande in verskillende streke gegrond. Hierdie tabelle word saamgestel om 'n aanduiding te gee van die verskil in winsgewendheid tussen die onderskeie somergewasse, maar dit is belangrik om daarop te let dat hierdie syfers van produsent tot produsent kan verskil.

WESTELIKE DELE VAN DIE LAND

Die saamgestelde mieliebegrotings en hulle prestasie teenoor ander gewasse word in **Tabel 7** getoon. Die opbrengsskenario's is op aanames vir produksietoestande in die westelike dele van die land (Noordwes en die Noordwes-Sentraal-Vrystaat) gegrond. Hierdie figuur word saamgestel om 'n aanduiding te gee van die verskil in winsgewendheid tussen die onderskeie somergewasse (mielies, sonneblom, sojabone), maar dit is belangrik om daarop te let dat hierdie syfers van produsent tot produsent kan verskil.

Terwyl **Tabel 7** geraamde produksiekoste vir Noordwes en die Noordwes-Sentraal-Vrystaat toon, illustreer **Grafiek 18** die bruto en netto margesituasie. Sonneblomproduksie was die afgelope seisoen onder geweldige druk as gevolg van siektes wat 'n baie negatiewe impak op

negative impact on yields. In the case of sunflower production in the North West Province, the profitability situation looks relatively promising when for example compared to maize.

According to the calculations maize profitability appears to be better when for example compared to last year. Last year when the maize budgets were compiled a Safex price of R2 300/ton was used compared to the current Safex July 2020 price trading at R2 700/ton.

EASTERN PARTS OF THE COUNTRY

Table 8 sets out the production costs for the eastern parts of the country (Eastern Free State and Eastern Highveld). The production costs of maize, sunflower and soybeans with different yield targets are compared for the Eastern Free State while only maize and soybeans are compared in the Eastern Highveld. According to the production

opbrengste gehad het. In die geval van sonneblomproduksie in Noordwes lyk die winsgewendheidsituasie relatief belowend wanneer dit byvoorbeeld met mielies vergelyk word.

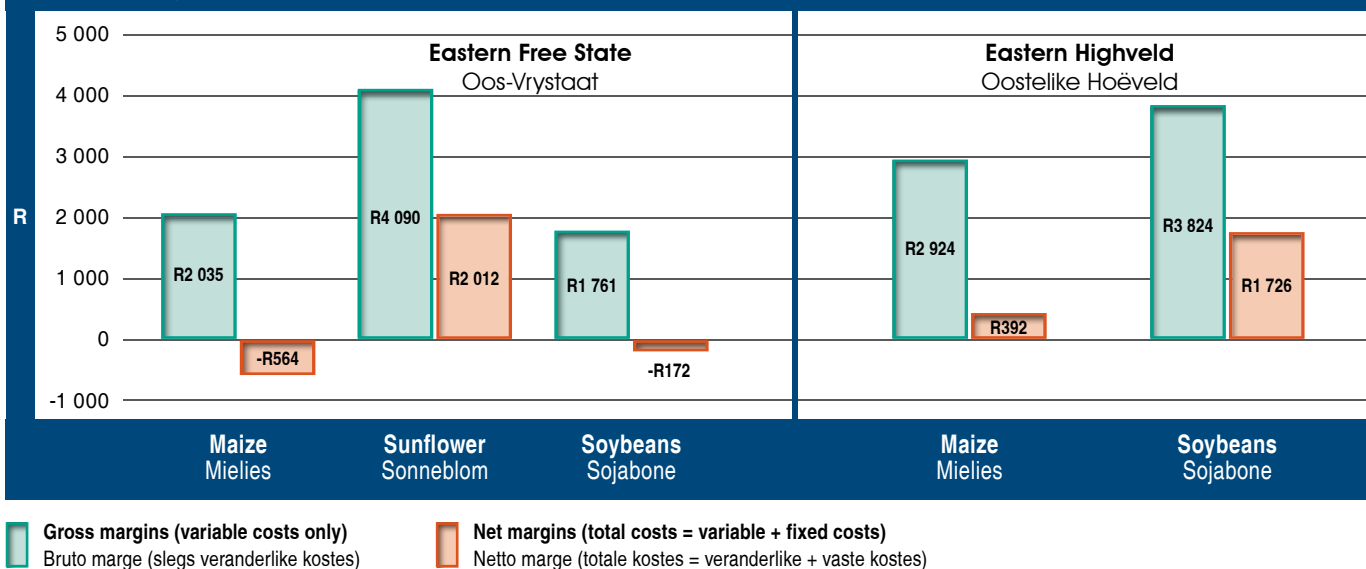
Volgens die berekenings lyk dit asof mielies se winsgewendheid beter is wanneer dit byvoorbeeld met verlede jaar s'n vergelyk word. Toe die mieliebegrotings verlede jaar saamgestel is, is 'n Safex-prys van R2 300/ton gebruik, vergeleke met die huidige Safex-prys van Julie 2020, wat teen R2 700/ton verhandel.

OOSTELIKE DELE VAN DIE LAND

Tabel 8 sit die produksiekoste vir die oostelike dele van die land (Oos-Vrystaat en oostelike Hoëveld) uiteen. Vir die Oos-Vrystaat word die produksiekoste van mielies, sonneblom en sojabone met verskillende opbrengsmikpunte vergelyk, terwyl slegs mielies en sojabone vir die

GRAPH 19 – Margin comparison for summer grain crops in the Eastern Free State and Eastern Highveld for the 2019/2020 season.

GRAFIEK 19 – Margevergelgking vir somergraangewasse in die Oos-Vrystaat en op die oostelike Hoëveld vir die 2019/2020-seisoen.



GRAPH 20 – Margin comparison for summer grain crops under irrigation in the Northern Cape and Limpopo for the 2019/2020 season.

GRAFIEK 20 – Margevergelgking vir somergraangewasse onder besproeiing in die Noord-Kaap en Limpopo vir die 2019/2020-seisoen.

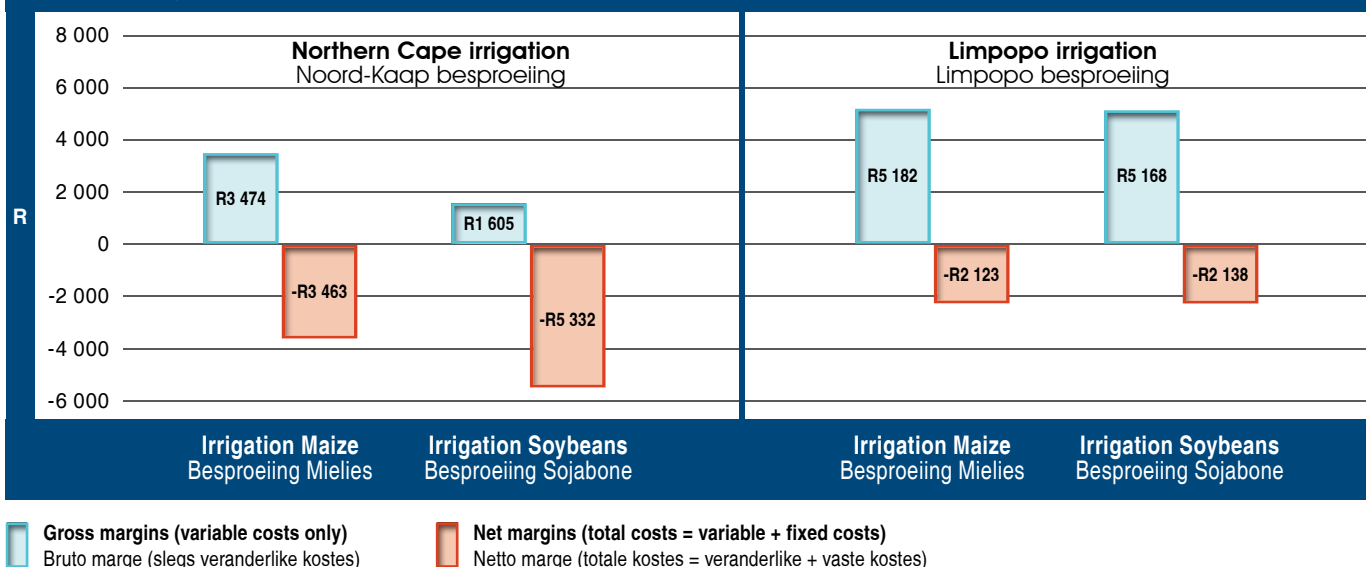


TABLE 8 – Comparison of production cost budgets for summer grain for the 2019/2020 season (eastern region).
TABEL 8 – Vergelyking van produksiekostebegrotings vir somergraan vir die 2019/2020-seisoen (oostelike streke).

	EASTERN FREE STATE OOS-VRYSTAAT			EASTERN HIGHELD OOSTELIKE HOËVELD	
	Maize Mielies	Sunflower Sonneblom	Soybeans Sojabone	Maize Mielies	Soybeans Sojabone
1. Income/Inkomste					
Planned yield/Beplande opbrengs (t/ha)	5,00	2,00	1,80	6,00	2,20
Safex price (best grade)/Safex-prys (beste graad) (R/ton)	R2 700	R5 120	R5 300	R2 700	R5 300
Deductions/Aftrekkings (R/ton)	R313	R363	R128	R289	R128
Producer price/Produsenteprys (R/ton)	R2 387	R4 757	R5 172	R2 411	R5 172
Gross income/Bruto inkomste (R/ha)	R11 935	R9 514	R9 310	R14 466	R11 378
2. Variable costs/Veranderlike kostes					
Seed/Saad	R1 775	R528	R1 159	R2 209	R1 159
Fertiliser/Kunsmis	R2 266	R1 572	R1 355	R3 183	R2 280
Lime/Kalk	R530	R-	R-	R210	R-
Fuel/Brandstof	R1 032	R808	R818	R992	R848
Repairs/Reparasie	R871	R717	R731	R706	R525
Herbicides/Onkruidodders	R799	R614	R862	R1 216	R1 104
Pesticides/Plagdoer	R558	R25	R671	R756	R317
Input insurance/Insetversekering	R233	R212	R304	R282	R204
Grain price hedging/Graanprysverskansing	R707	R257	R327	R838	R326
Crop insurance/Oesversekering	R375	R409	R943	R548	R398
Production credit interest/Produksiekrediet-rente	R754	R283	R379	R602	R394
Total variable costs/Totale veranderlike koste (R/ha)	R9 900	R5 424	R7 549	R11 542	R7 555
Total fixed costs/Totale vaste koste (R/ha)	R2 599	R2 078	R1 933	R2 533	R2 098
Total costs/Totale koste (R/ha)	R12 499	R7 502	R9 482	R14 074	R9 653
3. Gross margin/Bruto marge (R/ha)	R2 035	R4 090	R1 761	R2 924	R3 824
4. Net margin/Netto marge (R/ha)	-R564	R2 012	-R172	R392	R1 726
Breakeven (variable costs only)/Gelykbreek (slegs veranderlike koste)					
Yield/Opbrengs (t/ha)	4,15	1,14	1,46	4,79	1,46
Safex price/Safex-prys (R/ha)	2 293	3 075	4 322	2 213	3 562
Breakeven (variable + fixed cost)/Gelykbreek (veranderlike + vaste koste)					
Yield/Opbrengs (t/ha)	5,24	1,58	1,83	5,84	1,87
Safex price/Safex-prys (R/ha)	2 813	4 114	5 396	2 635	4 516

cost calculations, the variable cost of producing maize in the Eastern Free State for a 5,0 t/ha yield target is ± R9 900/ha while it is ± R11 542 for a 6,0 t/ha yield target. If this relatively higher Safex price is to realise at the estimated budgeted input costs (excluding fixed costs), a producer in the Eastern Free State should harvest 4,15 t/ha, to break-even where a producer in the Eastern Highveld should harvest 4,79 t/ha to break-even. The problem and concern is that when the break-even yields for the total costs (including fixed costs) are calculated and all maize producer's costs cannot be covered.

Table 8 further illustrates the breakdown of input costs for the cultivation of soybeans and sunflower. Assumptions where made when compiling soybean budgets: 50% of the seed cost are retained by producers while the other 50% is certified seed. The budget also includes a cost for N, P and K as well as the R65/ton breeding and technology levy that came into effect on 1 March 2019. Given the input costs (excluding fixed costs), as shown in **Table 8** for soybeans and the mentioned Safex price, a yield of approximately 1,46 t/ha in the Eastern Free State as well as Eastern Highveld should be obtained to break-even.

Sunflower is only planted on a small scale in the Eastern Free State and was under severe pressure this past season due to diseases that had a very negative impact on yields. In the case of sunflower, the profitability picture seems relatively promising and the break-even yield and Safex price can be seen in **Table 8**.

oostelike Hoëveld vergelyk word. Volgens die produksiekosteberekeninge is die veranderlike koste vir die produksie van mielies in die Oos-Vrystaat vir 'n opbrengsmikpunt van 5,0 t/ha ongeveer R9 900/ha, terwyl dit vir 'n opbrengsmikpunt van 6,0 t/ha ongeveer R11 542 is. Indien hierdie relatief hoër Safex-prys teen die geraamde begrote insetkoste (vaste koste uitgesluit) moet realiseer, moet 'n produsent in die Oos-Vrystaat 4,15 t/ha oes om gelyk te breek, terwyl 'n produsent op die oostelike Hoëveld 4,79 t/ha moet stroop om gelyk te breek. Die probleem en bekommernis is dat wanneer die gelykbreekopbrengste vir die totale koste (vaste koste ingesluit) bereken word, kan al die mielieprodusent se koste nie gedek word nie.

Tabel 8 illustreer verder die uiteensetting van insetkoste vir die verbouing van sojabone en sonneblom. Aannames is met die samestelling van sojaboonbegrotings gemaak: 50% van die saadkoste word deur produsente teruggehou, terwyl die ander 50% gesertifiseerde saad is. Die begroting sluit ook 'n koste vir N, P en K, en ook die R65/ton teling- en tegnologieheffing in wat op 1 Maart 2019 in werking getree het. Gegewe die insetkoste (vaste koste uitgesluit), soos in **Tabel 8** vir sojabone aangedui word, en die gemelde Safex-prys, moet 'n opbrengs van ongeveer 1,46 t/ha in die Oos-Vrystaat sowel as op die oostelike Hoëveld behaal word om gelyk te breek.

Sonneblom word slegs op klein skaal in die Oos-Vrystaat geplant, en dit was die afgelope seisoen onder erge druk as gevolg van siektes wat 'n baie negatiewe impak op opbrengste gehad het. In die geval van sonneblom lyk die winsgewendheidsprentjie relatief belowend, en die gelykbreekopbrengs en Safex-prys kan in **Tabel 8** gesien word.

IRRIGATION

When the cost per hectare between dry land and irrigation is compared, there is a significant difference. The difference in variable cost is mainly due to the higher plant density under irrigation resulting in an increase in both seed and fertiliser costs.

Except for the price increases in input costs, an irrigation producer is suffering under the constant increase in the cost of, for example electricity, water and pivot maintenance – just to name a few. **Table 9** shows the estimated production costs for irrigation crops for the Northern Cape and Limpopo for the coming season (2019/2020). According to calculations, the variable cost to produce maize under irrigation in the Northern Cape for a 14 t/ha yield target is a shocking R29 496/ha, while it is R24 734 for a 12t/ha yield target in Limpopo.

If the Safex price as well as the estimated budgeted input costs (only variable costs) realises, it seems as though an irrigation producer would be able to cover his variable costs. However, if the fixed cost component is also taken into account profitable maize production is under pressure and maize will be produced at a loss. In summary, **Graph 20** (on page 80) show that profitable maize production under irrigation for both regions is under pressure if the total (variable and fixed) costs are taken into account.

BESPROEING

Wanneer die koste per hektaar vir droëland en besproeiing vergelyk word, is daar 'n beduidende verskil. Die verskil in veranderlike koste is hoofsaaklik as gevolg van die hoër plantdigtheid onder besproeiing, wat tot 'n styging in saad- sowel as kunsmiskoste lei.

Buiten vir die prysverhogings in insetkoste, gaan 'n besproeiingsprodusent gebuk onder die voortdurende verhoging in die koste van byvoorbeeld elektrisiteit, water en instandhouding van spilpunte – om maar 'n paar te noem. **Tabel 9** toon die geraamde produksiekoste vir besproeiingsgewasse vir die Noord-Kaap en Limpopo vir die komende seisoen (2019/2020). Volgens berekeninge is die veranderlike koste om mielies in die Noord-Kaap onder besproeiing te produseer vir 'n opbrengsmikpunt van 14 t/ha 'n skokkende R29 496/ha, terwyl dit in Limpopo vir 'n opbrengsmikpunt van 12 t/ha R24 734 is.

Indien die Safex-prys sowel as die geraamde begrote insetkoste (slegs veranderlike koste) realiseer, wil dit voorkom of 'n besproeiingsprodusent sy veranderlike koste sal kan dek. As die vastekostekomponent egter ook in ag geneem word, is winsgewende mielieproduksie onder druk, en mielies sal teen 'n verlies geproduseer word. Ter opsomming toon **Grafiek 20** (op bladsy 80) dat winsgewende mielieproduksie onder besproeiing vir albei streke onder druk is as die totale (veranderlike en vaste) koste in ag geneem word.

TABLE 9 – Comparison of production cost budgets for summer grain crops under irrigation for the 2019/2020 season.
TABEL 9 – Vergelyking van produksiekostebegrotings vir somergraangewasse onder besproeiing vir die 2019/2020-seisoen.

	NORTHERN CAPE IRRIGATION NOORD-KAAP BESPROEING		LIMPOPO IRRIGATION LIMPOPO BESPROEING	
	Irrigation Maize Besproeiing Mielies	Irrigation Soybeans Besproeiing Sojabone	Irrigation Maize Besproeiing Mielies	Irrigation Soybeans Besproeiing Sojabone
1. Income/Inkomste				
Planned yield/Beplande opbrengs (t/ha)	14,00	4,00	12,00	3,50
Safex price (best grade)/Safex-prys (beste graad) (R/ton)	R2 700	R5 300	R2 700	R5 300
Deductions/Aftrekkings (R/ton)	R345	R128	R207	R128
Producer price/Produsenteprys (R/ton)	R2 355	R5 172	R2 493	R5 172
Gross income/Bruto inkomste (R/ha)	R32 970	R20 688	R29 916	R18 102
2. Variable costs/Veranderlike kostes				
Seed/Saad	R4 840	R1 593	R3 898	R1 817
Fertiliser/Kunsmis	R9 462	R5 798	R6 295	R1 150
Fuel/Brandstof Lime/Kalk	R1 063	R721	R1 125	R1 061
Repairs/Reparasie	R463	R330	R467	R500
Herbicides/Onkruidodders	R254	R398	R317	R349
Pesticides/Plaagdoder	R2 737	R1 240	R62	R176
Irrigation cost/Besproeiingskoste	R4 782	R4 782	R6 847	R4 806
Grain price hedging/Graanprysverskansing	R2 202	R829	R1 748	R562
Contract harvesting/Kontrakstroop	R1 400	R1 400	R800	R800
Crop insurance/Oesversekering	R492	R1 110	R1 789	R916
Air spray/Lugbespuiting	R400	R -	R192	R192
Production credit interest/Produksiekrediet-rente	R1 401	R882	R1 194	R605
Total variable costs/Totale veranderlike koste (R/ha)	R29 496	R19 083	R24 734	R12 934
Total fixed costs/Totale vaste koste (R/ha)	R6 937	R6 937	R7 305	R7 305
Total costs/Totale koste (R/ha)	R36 433	R26 020	R32 039	R20 240
3. Gross margin/Bruto marge (R/ha)	R3 474	R1 605	R5 182	R5 168
4. Net margin/Netto marge (R/ha)	-R3 463	-R5 332	-R2 123	-R2 138
Breakeven (variable costs only)/Gelykbreek (slegs veranderlike koste)				
Yield/Opbrengs (t/ha)	12,52	3,69	9,92	2,50
Safex price/Safex-prys (R/ha)	2 452	4 899	2 268	3 824
Breakeven (variable + fixed cost)/Gelykbreek (veranderlike + vaste koste)				
Yield/Opbrengs (t/ha)	15,47	5,03	12,85	3,91
Safex price/Safex-prys (R/ha)	2 947	6 633	2 877	5 911

An environment for good practices and governance maintained

REPORT: CORPORATE GOVERNANCE

Compliance with applicable legislation and the guidelines of the King IV report are essential to Grain SA. Measures are taken to ensure good governance, inclusive of the following:

► Annual report and financial statements

The annual report and the financial statements of the Grain SA Group are presented annually to Congress for approval.

► Audits and policy

Management processes are audited to ensure that it complies with the requirements of the internal policy and procedures of Grain SA. Possible risks are discussed during audit committee meetings, with recommendations by Management for control measures to manage these risks.

► Audit Committee meetings

Meetings by the Audit Committee, which is also attended by members of the management team and the external auditors, promote an environment for good management practices and corporate governance.

'n Omgewing vir goeie praktyk en beheer word gehandhaaf

VERSLAG: KORPORATIEWE BEHEER

Vir Graan SA is dit noodsaaklik om aan toepaslike wetgewing en die riglyne van die King IV-verslag te voldoen. Maatreëls word getref om goeie beheer te verseker, en sluit die volgende in:

► Jaarverslag en finansiële state

Die jaarverslag en die finansiële state van die Graan SA Groep word jaarliks vir goedkeuring aan Kongres voorgelê.

► Oudits en beleid

Bestuursprosesse word geouditeer om te verseker dat dit aan die vereistes van die interne beleid en prosedures van Graan SA voldoen. Moontlike risiko's word tydens ouditkomiteevergaderings bespreek, met aanbevelings deur Bestuur oor beheermaatreëls om hierdie risiko's te bestuur.

► Ouditkomiteevergaderings

Vergaderings deur die Ouditkomitee, wat ook deur lede van die bestuurspan en die eksterne ouditeurs bygewoon word, bevorder 'n omgewing vir goeie bestuurspraktyke en korporatiewe beheer.

Financial Services Finansiële Dienste



Leticia Reid
CREDITORS CLERK
KREDITEUREKLERK



Stien le Roux
DEBTORS CLERK
DEBITEUREKLERK



Christa Herbst
MANAGER: FINANCIAL SERVICES
BESTUURDER: FINANSIËLE DIENSTE



Lydia Kasumba
ACCOUNTANT
REKENMEESTER



Madelie Goosen
ASSISTANT ACCOUNTANT
ASSISTENT REKENMEESTER

Grain SA performs well despite challenges

OVERVIEW

Grain SA performed well over the financial period ended 30 September 2019 in spite of volatile economic conditions and the drought experienced by so many of our members. We thank our members for their contribution towards Grain SA enabling us to add value to the grain industry.

Contributions from our members, partners, government and other key players allow us to focus on delivering strategic support services and allowing us to be part of matters concerning the wellbeing of the industry, policy, research activities and farmer development.

RESULTS

Grain SA ended the financial year with a surplus. Departments within Grain SA cut costs where applicable without compromising quality. Additional income for which we did not budget with these savings on expenditure contributed towards our surplus at year-end.

Grain SA is a moderate investor. Grain SA's cash flow is positive for the current and previous financial year which represents the organisation's cash available after an inflow to operations and to maintain its capital expenditure.

The audit report, issued by PricewaterhouseCoopers, is unqualified and Grain SA is pleased in presenting the financial statements as set out on pages 85 to 112.

Members can be assured that the finances are sound with good corporate governance and the necessary policies and procedures in place.

Graan SA presteer goed te midde van uitdagings

OORSIG

Graan SA het goed presteer tydens die finansiële jaar geëindig 30 September 2019 ongeag druk ekonomiese toestande en die droogte wat deur baie van ons produsente ervaar word. Ons is dankbaar teenoor ons lede vir hulle bydrae deur die jaar wat dit moontlik maak vir ons organisasie om waarde toe te voeg tot die graanbedryf.

Bydraes vanaf lede, vennote, die regering en ander rolspelers stel ons in staat om te fokus op ons kernbesigheid, wat insluit dienslewering aan die bedryf op sake wat die voortbestaan daarvan ondersteun, navorsingsaktiwiteite en ook landbou-ontwikkeling.

RESULTATE

Graan SA eindig die jaar met 'n surplus. Departemente het gespaar waar moontlik sonder om kwaliteit in te boet en addisionele inkomste waarvoor nie begroot is nie het bygedra tot die surplus op jaareinde.

Graan SA is 'n gematigde belegger. Kontantvloei is positief vir die huidige jaar sowel as die vorige finansiële jaar. Dit verteenwoordig die organisasie se kontant beskikbaar na 'n kontantvloei uit bedrywighede en kontantuitvloei aan die instandhouding van kapitale uitgawes.

Die ouditverslag, uitgereik deur PricewaterhouseCoopers, is ongekwalifiseerd en Graan SA hou graag die finansiële state voor soos vervat in bladsye 85 tot 112.

Lede word verseker van goeie korporatiewe bestuur met die nodige prosedures en maatreëls in plek om die bedrywighede te ondersteun en finansies kerngesond te hou.

Corporate information

Korporatiewe inligting

COUNTRY OF INCORPORATION AND DOMICILE	LAND VAN INKORPORASIE EN DOMISILIE
South Africa	Suid-Afrika
NATURE OF BUSINESS AND PRINCIPAL ACTIVITIES	AARD VAN BESIGHEID EN HOOFAKTIWITEITE
Grain SA is incorporated in South Africa and is an organisation that functions to promote the interests of grain producers within South Africa.	Graan SA is 'n organisasie wat funksioneer ter bevordering van die belange van graanprodusente binne Suid- Afrika.
EXECUTIVES	UITVOERENDE BESTUUR
JJ Minnaar (Chairperson) JF de Villiers (Chief Executive Officer)	JJ Minnaar (Voorsitter) JF de Villiers (Uitvoerende Hoofbestuurder)
BUSINESS ADDRESS	BESIGHEIDSADRES
Block C Alenti Office Park 457 Witherite Avenue The Willows Pretoria 0041	Blok C Alenti Office Park Witheritelaan 457 The Willows Pretoria 0041
POSTAL ADDRESS	POSADRES
PO Box 74087 Lynnwood Ridge Pretoria 0040	Posbus 74087 Lynnwoodrif Pretoria 0040
BANKERS	BANKIERS
Absa Bank Limited	Absa Bank Beperk
AUDITORS	OUDITEURE
PricewaterhouseCoopers Incorporated Registered Auditors	PricewaterhouseCoopers Geïnkorporeer Geregistreerde Ouditeure
PREPARER	OPSTELLER
These financial statements are independently compiled under the supervision of E van Niekerk, CA (SA)	Hierdie finansiële state is onafhanklik voorberei onder toesig van E van Niekerk, GR (SA)
ISSUED	GEPUBLISEER
12 February 2020	12 Februarie 2020

Executive's responsibilities and approval

The Executive is required to maintain adequate accounting records and is responsible for the content and integrity of the financial statements and related financial information included in this report. It is their responsibility to ensure that the financial statements fairly present the state of affairs of the organisation as at the end of the financial year and the results of its operations and cash flows for the period then ended, in conformity with the International Financial Reporting Standard for Small and Medium-sized Entities.

The financial statements are prepared in accordance with the International Financial Reporting Standard for Small and Medium-sized Entities and are based upon appropriate accounting policies consistently applied and supported by reasonable and prudent judgements and estimates.

The Executive acknowledge that they are ultimately responsible for the system of internal financial control established by the organisation and place considerable importance on maintaining a strong control environment. To enable the Executive to meet these responsibilities, the Executive sets standards for internal control aimed at reducing the risk of error or loss in a cost effective manner. The standards include the proper delegation of responsibilities within a clearly defined framework, effective accounting procedures and adequate segregation of duties to ensure an acceptable level of risk. These controls are monitored throughout the organisation and all employees are required to maintain the highest ethical standards in ensuring the organisation's business is conducted in a manner that in all reasonable circumstances is above reproach. The focus of risk management in the organisation is on identifying, assessing, managing and monitoring all known forms of risk across the organisation. While operating risk cannot be fully eliminated, the organisation endeavours to minimise it by ensuring that appropriate infrastructure, controls, systems and ethical behaviour are applied and managed within predetermined procedures and constraints.

The Executive are of the opinion, based on the information and explanations given by Management, that the system of internal control provides reasonable assurance that the financial records may be relied on for the preparation of the financial statements. However, any

Hoofbestuur verantwoordelikhede en goedkeuring

Hoofbestuur moet toereikende rekeningkundige rekords handhaaf en is verantwoordelik vir die inhoud en integriteit van die finansiële state en verwante finansiële inligting wat by hierdie verslag ingesluit is. Dit is hulle verantwoordelikheid om te verseker dat die finansiële state 'n redelike weergawe is van die stand van sake van die organisasie soos op die einde van die finansiële jaar en die resultate van sy bedrywighede en kontantvloeï vir die tydperk wat op daardie datum geëindig het, in ooreenstemming met die International Financial Reporting Standard for Small and Medium-sized Entities.

Die finansiële state is ooreenkomstig die International Financial Reporting Standard for Small and Medium-sized Entities opgestel en is gebaseer op toepaslike rekeningkundige beleid wat konsekwent toegepas is en wat deur redelike en verstandige oordeel en ramings ondersteun word.

Die Hoofbestuur erken dat hul uiteindelik verantwoordelik is vir die stelsels van interne finansiële beheer wat deur die organisasie ingestel is en plaas aansienlike klem op die handhawing van 'n streng beheeromgewing. Die Hoofbestuur stel standaarde vir interne beheer wat daarop gemik is om die risiko van foute of verliese op 'n koste-effektiewe wyse te verminder, om die Hoofbestuur in staat te stel om hierdie verantwoordelikhede na te kom. Die standaarde sluit in die behoorlike delegasie van verantwoordelikhede binne 'n duidelik gedefinieerde raamwerk, effektiewe rekeningkundige prosedures en toereikende skeiding van pligte om 'n aanvaarbare risikovlak te verseker. Hierdie beheermaatreëls word regdeur die organisasie gemonitor en alle werknemers word verplig om die hoogste etiese standaarde te handhaaf om te verseker dat die organisasie se besigheid uitgevoer word op 'n wyse wat in alle redelike omstandighede bo verdenking is. Die organisasie se fokus op risikobestuur is gerig op die identifisering, evaluering, bestuur en monitering van alle bekende risiko's in die organisasie. Hoewel die bedryfsrisiko nie heeltemal uitgeskakel kan word nie, poog die organisasie om dit tot 'n minimum te beperk deur te verseker dat die toepaslike infrastruktuur, kontroles, stelsels en etiese gedrag binne voorafbepaalde prosedures en beperkings toegepas en bestuur word.

Die Hoofbestuur is van mening, gebaseer op die inligting en verduidelikings wat deur die Bestuur gegee is, dat die interne beheerstelsels

system of internal financial control can provide only reasonable, and not absolute, assurance against material misstatement or loss.

The Executive have reviewed the organisation's cash flow forecast for the year to 30 September 2020 and, in the light of this review and the current financial position, they are satisfied that the organisation has access to adequate resources to continue in operational existence for the foreseeable future.

The external auditors are responsible for independently auditing and reporting on the organisation's financial statements. The financial statements have been examined by the organisation's external auditors and their report is presented on pages 90 to 92.

The external auditors were given unrestricted access to all financial records and related data, including minutes of all meetings of the members and the Executive. The Executive believes that all representations made to the independent auditors during their audit are valid and appropriate.

The financial statements and supplementary information set out on pages 88 to 112, which have been prepared on the going concern basis, were approved by the Executive on 4 February 2020 and were signed on its behalf by:

redelike sekerheid bied dat daar vir die voorbereiding van die finansiële state op die finansiële rekords gesteun kan word. Enige interne finansiële beheerstelsel kan egter slegs redelike, en nie absolute, versekering bied teen enige wesenlike wanvoorstelling of verlies.

Die Hoofbestuur het die organisasie se kontantvloei-vooruitskatting vir die jaar tot 30 September 2020 geëvalueer en, in die lig van hierdie oorsig en die huidige finansiële posisie, is hulle oortuig dat die organisasie toegang het tot toereikende hulpbronne om voort te gaan in operasionele bestaan in die afsienbare toekoms.

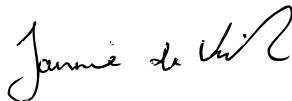
Die eksterne ouditeure is verantwoordelik vir die onafhanklike ouditering en verslagdoening van die organisasie se finansiële state. Die finansiële state is deur die organisasie se eksterne ouditeure ondersoek en hul verslag is uiteengesit op bladsye 90 tot 92.

Die eksterne ouditeure het onbeperkte toegang tot alle finansiële rekords en verwante dokumente, insluitende notules van al die vergaderings van die lede en die Hoofbestuur. Die Hoofbestuur glo dat alle vertoë gerig aan die onafhanklike ouditeure gedurende die audit geldig en van toepassing is.

Die finansiële state en addisionele skedules wat uiteengesit is op bladsye 88 tot 112, en voorberei is op die lopendesaa-grondslag, is goedgekeur en onderteken namens die Hoofbestuur op 4 Februarie 2020 deur:



Jaco Minnaar
CHAIRPERSON
VOORSITTER



Jannie de Villiers
CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER



Composition of the Executive

Samestelling van Hoofbestuur

JJ Minnaar
CHAIRPERSON/VOORSITTER

DJM Mathews
VICE-CHAIRPERSON/VISEVOORSITTER

RE Monaisa
VICE-CHAIRPERSON/VISEVOORSITTER

GJ Bergh

M Bothma

JJ Breytenbach

GL Bruwer

CJ Claassen

PH Corver

JA du Plessis

DR Fourie

MF Gildenhuys

MJ Groenewald

WJ Groothof

SF Haasbroek

AF Kirsten

RP Krige

SG Krüger

RJ Küsel

WJ Marais

AS Mars

JM Mathebula

JDM Minnaar

I Moflhabane

RE Pholo

JG Pretorius

RB Pretorius

DJ Reichel

GL Roos

DJH Rossouw

K Schoeman

BC Schoonwinkel

JC Swanepoel

PM Stuurman

PC Swart

JJ van der Westhuizen

PH Zietsman

Executive's report

The Executive has pleasure in submitting their report on the financial statements of Grain SA for the year ended 30 September 2019.

NATURE OF BUSINESS

Grain SA is incorporated in South Africa and is an organisation that functions to promote the interests of grain producers within South Africa. The organisation operates in South Africa.

There have been no material changes to the nature of the organisation's business from the prior year.

CONTACT INFORMATION

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 Alenti Office Park
 457 Witherite Avenue
 The Willows
 Pretoria
 0041

Postal address PO Box 74087
 Lynnwood Ridge
 Pretoria
 0040

REVIEW OF FINANCIAL RESULTS AND ACTIVITIES

The financial statements have been prepared in accordance with the International Financial Reporting Standard for Small and Medium-sized Entities. The accounting policies have been applied consistently compared to the prior year.

GOING CONCERN

The financial statements have been prepared on the basis of accounting policies applicable to a going concern. This basis presumes that funds will be available to finance future operations and that the realisation of assets and settlement of liabilities, contingent obligations and commitments will occur in the ordinary course of business.

The Executive believes that the organisation has sufficient financial resources to continue trading in the foreseeable future and accordingly the financial statements have been prepared on a going concern basis.

The Executive is satisfied that the organisation has a sound financial position and that it has access to sufficient loan facilities to comply with all foreseeable cash requirements. The Executive is not aware of any new material changes that may adversely affect the organisation.

The Executive is also not aware of any material non-compliance with statutory or regulatory requirements or any pending changes to legislation that may affect the organisation, except for the contingent liability as disclosed in note 15.

EVENTS AFTER THE REPORTING PERIOD

The Executive is not aware of any material event which occurred after the reporting date and up to the date of this report that would have a material impact on these financial statements, except for the contingent liability as disclosed in note 15.

Hoofbestuur se verslag

Disit is vir die Hoofbestuur aangenaam om hul verslag oor die finansiële state van Graan SA vir die jaar geëindig 30 September 2019, in te dien.

AARD VAN BESIGHEID

Graan SA is in Suid-Afrika geïnkorporeer en is 'n organisasie wat funksioneer ter bevordering van die belange van graanprodusente binne Suid-Afrika. Die organisasie dryf handel in Suid-Afrika.

Daar was geen wesenlike veranderinge in die organisasie se aard van besigheid sedert die vorige jaar nie.

KONTAKBESONDERHEDE

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 Alenti Office Park
 Witheritelaaan 457
 The Willows
 Pretoria
 0041

Posadres Posbus 74087
 Lynnwoodrif
 Pretoria
 0040

OORSIG VAN FINANSIËLE RESULTATE EN AKTIWITEITE

Die finansiële state is voorberei in ooreenstemming met International Financial Reporting Standard for Small and Medium-sized Entities. Die rekeningkundige beleid is konsekwent in vergelyking met die vorige jaar toegepas.

LOPENDE SAAK

Die finansiële state is opgestel op grond van rekeningkundige beleid wat op 'n lopende saak van toepassing is. Die grondslag veronderstel dat fondse beskikbaar sal wees om toekomstige bedrywighede te finansier en dat die realisering van bates en vereffening van laste, voorwaardelike verpligtinge en aanspreeklikhede in die gewone gang van sake sal plaasvind.

Die Hoofbestuur glo dat die organisasie oor voldoende finansiële hulpbronne beskik om voort te gaan met handel in die afsienbare toekoms en dienooreenkomstig is die finansiële state op 'n lopendesaak-grondslag voorberei.

Die Hoofbestuur is tevrede dat die organisasie oor 'n gesonde finansiële posisie beskik en dat dit toegang het tot voldoende leningsfasiliteite om alle afsienbare kontantvereistes na te kom. Die Hoofbestuur is nie bewus van enige nuwe wesenlike veranderinge wat die organisasie nadelig kan affekteer nie.

Die Hoofbestuur is ook nie bewus van enige wesenlike nie-voldoening aan statutêre of regulatoriese vereistes of enige hangende veranderinge aan wetgewing wat die organisasie kan affekteer nie, behalwe die voorwaardelike aanspreeklikheid soos geopenbaar in aantekening 15.

GEBEURE NA DIE VERSLAGDOENINGSTYDPERK

Die Hoofbestuur is nie bewus van enige wesenlike gebeurlikhede wat plaasgevind het na die verslagdoeningsdatum tot en met die datum van hierdie verslag nie, behalwe die voorwaardelike aanspreeklikheid soos geopenbaar in aantekening 15.

Independent Auditor's report

To the members of Grain South Africa

OUR OPINION

In our opinion, the financial statements present fairly, in all material respects, the financial position of Grain South Africa (the Organisation) as at 30 September 2019, and its financial performance and cash flows for the year then ended in accordance with the International Financial Reporting Standard for Small and Medium-sized Entities.

WHAT WE HAVE AUDITED

Grain South Africa's financial statements set out on pages 93 to 109 comprise:

- The statement of financial position as at 30 September 2019;
- the statement of comprehensive income for the year then ended;
- the statement of changes in equity for the year then ended;
- the statement of cash flows for the year then ended;
- accounting policies; and
- the notes to the financial statements.

BASIS FOR OPINION

We conducted our audit in accordance with International Standards on Auditing (ISAs). Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Independence

We are independent of the Organisation in accordance with the sections 290 and 291 of the Independent Regulatory Board for Auditors' Code of Professional Conduct for Registered Auditors (Revised January 2018), parts 1 and 3 of the Independent Regulatory Board for Auditors' Code of Professional Conduct for Registered Auditors (Revised November 2018) (together the IRBA Codes) and other independence requirements applicable to performing audits of financial statements in South Africa. We have fulfilled our other ethical responsibilities, as applicable, in accordance with the IRBA Codes and in accordance with other ethical requirements applicable to performing audits in South Africa. The IRBA Codes are consistent with the corresponding sections of the International Ethics Standards Board for Accountants' Code of Ethics for Professional Accountants and the International Ethics Standards Board for Accountants' International Code of Ethics for Professional Accountants (including International Independence Standards) respectively.

EMPHASIS OF MATTER

We draw attention to Note 15 to these financial statements, where a contingent liability was disclosed for a possible but uncertain Income Tax obligation. Our opinion is not modified in respect of this matter.

OTHER INFORMATION

The Executive Committee are responsible for the other information. The other information comprises the information included in the document titled 'Grain South Africa Financial Statements for the year ended 30 September 2019' and the document titled 'Grain SA Annual Report 2019'. The other information does not include the financial statements and our auditor's report thereon.

Onafhanklike Ouditeur se verslag

Aan die lede van Graan Suid-Afrika

ONS MENING

Na ons mening is die finansiële state, in alle wesenlike opsigte, 'n redelike voorstelling van die finansiële stand van Graan Suid-Afrika (die Organisasie) soos op 30 September 2019, en die Organisasie se finansiële prestasie en kontantvloei vir die jaar wat op daardie datum geëindig het, ooreenkomstig "International Financial Reporting Standard for Small and Medium-sized Entities".

WAT ONS GEOUDIT HET

Graan Suid-Afrika se finansiële state soos uiteengesit op bladsye 93 tot 109 bestaan uit:

- Die staat van finansiële posisie soos op 30 September 2019;
- die staat van wins of verlies en ander omvattende inkomste vir die jaar wat op daardie datum geëindig het;
- die staat van verandering in ekwiteit vir die jaar wat op daardie datum geëindig het;
- die staat van kontantvloei vir die jaar wat op daardie datum geëindig het;
- rekeningkundige beleid; en
- die aantekeninge tot die finansiële state.

GRONDSLAG VIR MENING

Ons het ons audit ooreenkomstig "International Standards on Auditing" ("ISAs") uitgevoer. Ons verantwoordelikhede ingevolge daardie standaard word verder beskryf in die Ouditeur se Verantwoordelikhede vir die audit van die finansiële state-afdeling van ons verslag.

Ons glo dat die auditbewyse wat ons verkry het, toereikend en toepaslik is om 'n grondslag vir ons auditmening te bied.

Onafhanklikheid

Ons is onafhanklik van die Organisasie in ooreenstemming met artikels 290 en 291 van die "Independent Regulatory Board for Auditors (IRBA)" se "Code of Professional Conduct for Registered Auditors (Revised January 2018)", afdelings 1 en 3 van die "Independent Regulatory Board for Auditors (IRBA)" se "Code of Professional Conduct for Registered Auditors (Revised November 2018)" (tesame die "IRBA Codes") en ander onafhanklikheidsvereistes wat van toepassing is op audits van finansiële state in Suid-Afrika. Ons het ons ander etiese verantwoordelikhede, soos van toepassing, ooreenkomstig die "IRBA Codes" en ooreenkomstig ander etiese vereistes wat van toepassing is op audits in Suid-Afrika vervul. Die "IRBA Codes" is konsekwent met ooreenstemmende artikels van onderskeidelik die "International Ethics Standards Board for Accountants" se "Code of Ethics for Professional Accountants" en die "International Ethics Standards Board for Accountants" se "International Code of Ethics for Professional Accountants (including International Independence Standards)".

BEKLEMTONINGSPARAGRAAF

Ons vestig aandag op Nota 15 tot die finansiële state, waar 'n voorwaardelike aanspreeklikheid ten opsigte van 'n moontlike maar onsekere inkomstebelastingverpligting geopenbaar is. Ons mening word nie aangepas vir die aangeleentheid nie.

ANDER INLIGTING

Die Hoofbestuur is verantwoordelik vir die ander inligting. Die ander inligting bestaan uit die inligting wat ingesluit is in die dokument getiteld "Graan Suid-Afrika Finansiële State vir die jaar geëindig 30 September 2019" en die dokument getiteld "Graan SA Jaarverslag 2019". Die ander inligting sluit nie die finansiële state en ons auditverslag daarvoor in nie.

Our opinion on the financial statements does not cover the other information and we do not express an audit opinion or any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information identified above and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit, or otherwise appears to be materially misstated.

If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

RESPONSIBILITIES OF THE EXECUTIVE COMMITTEE FOR THE FINANCIAL STATEMENTS

The Executive Committee are responsible for the preparation and fair presentation of the financial statements in accordance with the International Financial Reporting Standard for Small and Medium-sized Entities and for such internal control as the Executive Committee determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Executive Committee are responsible for assessing the Organisation's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Executive Committee either intend to liquidate the Organisation or to cease operations, or have no realistic alternative but to do so.

AUDITOR'S RESPONSIBILITIES FOR THE AUDIT OF THE FINANCIAL STATEMENTS

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with ISAs, we exercise professional judgement and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Organisation's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Executive Committee.

Ons mening oor die finansiële state dek nie die ander inligting nie en ons spreek geen ouditopinie of enige vorm van gerusstelling daaroor uit nie.

In verband met ons oudit van die finansiële state is dit ons verantwoordelikheid om die ander inligting wat hierbo geïdentifiseer is te lees, en sodoende te oorweeg of die ander inligting wesenlik teenstrydig is met die finansiële state of kennis verkry gedurende die oudit, of andersins blyk om wesenlik wanvoorgestel te wees.

Indien ons, op grond van die werk wat ons uitgevoer het, tot die gevolgtrekking kom dat daar 'n wesenlike wanvoorstelling van hierdie ander inligting is, word van ons vereis om daardie feit te rapporteer. Ons het niks om in hierdie verband te rapporteer nie.

VERANTWOORDELIKHEDE VAN DIE HOOFBESTUUR VIR DIE FINANSIËLE STATE

Die Hoofbestuur is verantwoordelik vir die opstel en redelike voorstelling van die finansiële state ooreenkomstig "International Financial Reporting Standard for Small and Medium-sized Entities" en vir sodanige interne beheer as wat die hoofbestuur nodig ag vir die opstel van finansiële state wat vry is van wesenlike wanvoorstelling, hetsy weens bedrog of foute.

As deel van die opstel van die finansiële state is die Hoofbestuur daarvoor verantwoordelik om die Organisasie se vermoë om as 'n lopende saak voort te bestaan te beoordeel, en soos toepaslik aangeleenthede wat verband hou met lopende saak en die gebruik van die lopende-saak-grondslag van verslagdoening te openbaar, tensy die Hoofbestuur beplan om die Organisasie te likwideer of om bedrywighede te staak, of geen realistiese alternatief het as om dit te doen nie.

OUDITEUR SE VERANTWOORDELIKHEDE VIR DIE OUDIT VAN DIE FINANSIËLE STATE

Ons doelwitte is om redelike gerusstelling te verkry of die finansiële state as 'n geheel vry is van wesenlike wanvoorstelling, hetsy weens bedrog of foute, en om 'n ouditeursverslag uit te reik wat ons mening bevat. Redelike gerusstelling is 'n hoë vlak van gerusstelling, maar is nie 'n waarborg dat 'n oudit wat ooreenkomstig die ISAs uitgevoer is altyd 'n wesenlike wanvoorstelling sal opspoor indien dit bestaan nie. Wanvoorstellings kan ontstaan as gevolg van bedrog of foute, en word individueel of in totaal wesenlik geag indien dit redelikerwys verwag kan word dat sodanige wanvoorstellings die ekonomiese besluite van gebruikers wat op grond van hierdie finansiële state geneem word sal beïnvloed.

As deel van 'n oudit ooreenkomstig die ISAs oefen ons professionele oordeel uit en doen haaf ons professionele skeptisisme deurlopend deur die oudit. Ons handhaaf ook die volgende:

- Identifiseer en beoordeel die risikos van wesenlike wanvoorstelling van die finansiële state, hetsy weens bedrog of foute, ontwerp en voer ouditprosedures uit na aanleiding van daardie risikos, en verkry ouditbewyse wat voldoende en toepaslik is om 'n grondslag vir ons ouditmening te bied. Die risiko van nie-opsporing van 'n wesenlike wanvoorstelling as gevolg van bedrog is groter as vir 'n wesenlike wanvoorstelling as gevolg van foute, aangesien bedrog samespanning, vervalsing, doelbewuste weglatings, wanvoorstellings, of die omseiling van interne beheer kan behels.
- Verkry 'n begrip van interne beheer relevant tot die oudit ten einde ouditprosedures te ontwerp wat toepaslik is in die omstandighede, maar nie vir die doel om 'n mening uit te spreek oor die effektiwiteit van die Organisasie se interne beheer nie.
- Evalueer die toepaslikheid van rekeningkundige beleid wat gebruik is en die redelikheid van rekeningkundige ramings en verwante openbaarmaking wat deur die Hoofbestuur gemaak is.

- Conclude on the appropriateness of the Executive Committees' use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Organisation's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Organisation to cease to continue as a going concern. Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with the Executive Committee regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

PricewaterhouseCoopers Inc.

PricewaterhouseCoopers Inc.

Director: Herman Badenhorst Eksteen

REGISTERED AUDITOR

4 Lisbon Lane
Waterfall City
Jukskei View
2090

12 February 2020

- Kom tot 'n gevolgtrekking oor die toepaslikheid van die Hoofbestuur se gebruik van die lopende-saak-grondslag van verantwoording, en gebaseer op ouditbewyse verkry, kom tot 'n gevolgtrekking oor die bestaan van 'n wesenlike onsekerheid wat verband hou met gebeure of omstandighede wat beduidende twyfel kan laat bestaan oor die Organisasie se vermoë om as 'n lopende saak voort te bestaan. Waar ons tot die gevolgtrekking kom dat 'n wesenlike onsekerheid bestaan word daar van ons vereis om in ons ouditeursverslag aandag te vestig op die toepaslike openbaarmaking in die finansiële state, of, indien sodanige openbaarmaking onvoldoende is, om ons mening te wysig. Ons gevolgtrekkings word gebaseer op ouditbewyse verkry tot en met die datum van ons ouditeursverslag. Toekomstige gebeure en omstandighede mag egter daartoe aanleiding gee dat die Organisasie ophou om as 'n lopende saak voort te bestaan. Evalueer die algehele voorstelling, struktuur en inhoud van die finansiële state, insluitende die openbaarmaking, en of die finansiële state die onderliggende transaksies en gebeure op só 'n manier weergee dat redelike voorstelling bereik word.

Ons kommunikeer met die Hoofbestuur oor, onder andere, die beplande omvang en tydsberekening van die oudit en beduidende ouditbevindinge, insluitende enige beduidende tekortkominge in interne beheer wat ons tydens ons oudit identifiseer.

PricewaterhouseCoopers Geïnk.

PricewaterhouseCoopers Geïnk.

Direkteur: Herman Badenhorst Eksteen

GEREGISTREERDE OUDITEUR

Lisbonlaan 4
Waterfall City
Jukskei View
2090

12 Februarie 2020

Statement of financial position

Staat van finansiële posisie

as at 30 September 2019

soos op 30 September 2019

	Notes	2019 R	2018 R	Aantekeninge
ASSETS				BATES
Current assets				Bedryfsbates
Inventories	2	199 003	129 553	2 Voorraad
Trade and other receivables	3	23 762 725	10 178 383	3 Handels- en ander debiteure
Cash and cash equivalents	4	18 222 011	15 620 333	4 Kontant en kontantekwivalente
		42 183 739	25 928 269	
Non-current assets				Nie-bedryfsbates
Property, plant and equipment	5	30 374 231	29 479 447	5 Eiendom, aanleg en toerusting
Other financial assets	6	36 838 896	35 811 328	6 Ander finansiële bates
Trust funds	7	-	-	7 Trustfondse
		67 213 127	65 290 775	
Total assets		109 396 866	91 219 044	Totale bates
EQUITY AND LIABILITIES				EKWITEIT EN AANSPEERLIKHEDE
Liabilities				Laste
Current liabilities				Bedryfslaste
Trade and other payables	8	44 510 348	28 551 473	8 Handels- en ander krediteure
Equity				Ekwiteit
Reserves		8 500 000	8 500 000	Reserwes
Retained surplus		56 386 518	54 167 571	Behoue surplus
		64 886 518	62 667 571	
Total equity and liabilities		109 396 866	91 219 044	Totale ekwiteit en aanspreeklikhede

The accounting policies on pages 96 to 100 and the notes on pages 101 to 109 form an integral part of the financial statements.

Die rekeningkundige beleid op bladsye 96 tot 100 en die aantekeninge op bladsye 101 tot 109 vorm 'n integrale deel van die finansiële state.

Statement of comprehensive income

Staat van wins of verlies en ander omvattende inkomste

for the year ended 30 September 2019

vir die jaar geëindig 30 September 2019

	Notes	2019 R	2018 R	Aantekeninge
Income	9	22 113 705	22 515 205	9 Inkomste
Other income	10	54 370 352	50 679 160	10 Ander inkomste
Operating expenses		(76 147 497)	(70 874 028)	Bedryfskoste
Operating surplus		336 560	2 320 337	Bedryfsurplus
Investment income	11	1 571 626	1 217 999	11 Beleggingsinkomste
Fair value adjustments	12	310 761	172 544	12 Billikewaarde-aanpassing
Finance costs	13	-	(540)	13 Finansieringskoste
Surplus for the year		2 218 947	3 710 340	Surplus vir die jaar
Other comprehensive income		-	-	Ander omvattende inkomste
Total comprehensive income for the year		2 218 947	3 710 340	Totale omvattende inkomste vir die jaar

The accounting policies on pages 96 to 100 and the notes on pages 101 to 109 form an integral part of the financial statements.

Die rekeningkundige beleid op bladsye 96 tot 100 en die aantekeninge op bladsye 101 tot 109 vorm 'n integrale deel van die finansiële state.

Statement of cash flows

Staat van kontantvloei

for the year ended 30 September 2019

vir die jaar geëindig 30 September 2019

	Notes	2019 R	2018 R	Aantekeninge
Cash flows from operating activities				Kontantvloei uit bedryfsaktiwiteite
Cash generated from operations	14	5 515 551	7 212 930	14 Kontant gegenereer deur bedrywighede
Interest received	11	1 085 871	895 318	11 Finansieringsinkomste
Dividends received	11	485 755	322 681	11 Dividende ontvang
Finance costs	13	-	(540)	13 Finansieringskoste
Net cash from operating activities		7 087 177	8 430 389	Netto kontantvloei uit bedryfsaktiwiteite
Cash flows from investing activities				Kontantvloei uit beleggingsaktiwiteite
Purchase of property, plant and equipment	5	(3 768 692)	(4 371 723)	5 Verkryging van eiendom, aanleg en toerusting
Sale of property, plant and equipment	5	-	16 009	5 Verkoop van eiendom, aanleg en toerusting
Net movement of financial assets		(716 807)	(1 379 964)	Netto beweging van finansiële bates
Net cash outflow from investment activities		(4 485 499)	(5 735 678)	Netto kontantuitvloei uit beleggingsaktiwiteite
Total cash movement for the year		2 601 678	2 694 711	Totale kontantbeweging vir die jaar
Balance at the beginning of the year		15 620 333	12 925 622	Saldo aan die begin van die jaar
Balance at the end of the year	4	18 222 011	15 620 333	Saldo aan die einde van die jaar

The accounting policies on pages 96 to 100 and the notes on pages 101 to 109 form an integral part of the financial statements.

Die rekeningkundige beleid op bladsye 96 tot 100 en die aantekeninge op bladsye 101 tot 109 vorm 'n integrale deel van die finansiële state.

Statement of changes in equity

Staat van verandering in ekwiteit

for the year ended 30 September 2019

vir die jaar geëindig 30 September 2019

	Reserve specifically approved by Congress Reserwe spesifiek goedgekeur deur Kongres	General reserve fund Algemene reserwe fonds	Total reserves Totale reserwes	Retained surplus Behoue surplus	Total equity Totale ekwiteit	
	R	R	R	R	R	
Balance at 1 October 2017	-	4 500 000	4 500 000	50 457 231	54 957 231	Saldo op 1 Oktober 2017
Surplus for the year	-	-	-	3 710 340	3 710 340	Surplus vir die jaar
Other comprehensive income	-	-	-	-	-	Ander omvattende inkomste
Total comprehensive income for the year	-	-	-	3 710 340	3 710 340	Totale omvattende inkomste vir die jaar
Transfer	3 000 000	1 000 000	4 000 000	-	4 000 000	Oorplasing
Total changes	3 000 000	1 000 000	4 000 000	-	4 000 000	Totale veranderinge
Balance at 1 October 2018	3 000 000	5 500 000	8 500 000	54 167 571	62 667 571	Saldo op 1 Oktober 2018
Surplus for the year	-	-	-	2 218 947	2 218 947	Surplus vir die jaar
Other comprehensive income	-	-	-	-	-	Ander omvattende inkomste
Total comprehensive income for the year	-	-	-	2 218 947	2 218 947	Totale omvattende inkomste vir die jaar
Balance at 30 September 2019	3 000 000	5 500 000	8 500 000	56 386 518	64 886 518	Saldo op 30 September 2019

The accounting policies on pages 96 to 100 and the notes on pages 101 to 109 form an integral part of the financial statements.

Die rekeningkundige beleid op bladsye 96 tot 100 en die aantekeninge op bladsye 101 tot 109 vorm 'n integrale deel van die finansiële state.

Accounting policies

for the year ended 30 September 2019

1. BASIS OF PREPARATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The financial statements have been prepared on a going concern basis in accordance with the International Financial Reporting Standard for Small and Medium-sized Entities. The financial statements have been prepared on the historical cost basis and incorporate the principal accounting policies set out below. They are presented in South African rand.

Grain SA is an organisation incorporated in South Africa. Grain SA is an organisation that functions to promote the interests of grain producers within South Africa. The registered office is Block C, Alenti Office Park, 457 Witherite Avenue, The Willows, Pretoria.

These accounting policies are consistent with the previous period.

1.1 Significant judgements and sources of estimation uncertainty

CRITICAL JUDGEMENTS IN APPLYING ACCOUNTING POLICIES

Management did not make critical judgements in the application of accounting policies, apart from those involving estimations, which would significantly affect the financial statements.

The following are the key assumptions concerning the future, and other key sources of estimation uncertainty at the end of the reporting period, that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year:

KEY SOURCES OF ESTIMATION UNCERTAINTY

Undue cost or effort

The Executive believes that due to the fact that there are no significant stakeholders in the organisation to whom the fair value of the investment property will benefit, that obtaining annual valuations for each property, would result in excessive costs (through valuers' fees) in comparison to the benefits that the users of these financials would receive from having the information.

The Executive has therefore applied the undue cost or effort exemption in respect of the organisation's investment properties. As a result, investment property has been transferred to property, plant and equipment and is accounted for in terms of the relevant accounting policy as set out in note 1.3.

1.2 Investment property

Investment property is land and buildings held to earn rentals or for capital appreciation or both, rather than for use in the production or supply of goods or services or for administrative purposes; or for sale in the ordinary course of business.

Investment property is initially measured at cost and subsequently at fair value with changes in fair value recognised in profit or loss. If the fair value of investment property cannot be measured reliably without undue cost or effort, then it is measured at cost less accumulated depreciation and accumulated impairment.

1.3 Property, plant and equipment

Property, plant and equipment are tangible assets which the organisation holds for its own use or for rental to others and which are expected to be used for more than one period.

Rekeningkundige beleid

vir die jaar geëindig 30 September 2019

1. OPSTELLINGSGRONDSLAG EN OPSOMMING VAN BEDUIDENDE REKENINGKUNDIGE BELEID

Die finansiële state is ooreenkomstig die International Financial Reporting Standard for Small and Medium-sized Entities opgestel. Die finansiële state is op die historiese kostegrondslag opgestel. Dit word in Suid-Afrikaanse rand aangebied.

Graan SA is 'n organisasie geïnkorporeer in Suid-Afrika. Graan SA is 'n organisasie wat funksioneer ter bevordering van die belange van graanprodusente binne Suid-Afrika. Die geregistreerde kantoor is Blok C, Alenti Office Park, Witheritelaan 457, The Willows, Pretoria.

Hierdie rekeningkundige beleid stem ooreen met die vorige tydperk.

1.1 Beduidende oordeel en bronne van ramingsonsekerheid

BELANGRIKE OORDEEL IN DIE TOEPASSING VAN REKENINGKUNDIGE BELEID

Daar word van bestuur vereis om van tyd tot tyd kritiese besluite te neem in die toepassing van die rekeningkundige beleid. Die oordele, afgesien van dié met betrekking tot ramings wat die mees beduidende uitwerking het op die bedrae wat in die finansiële state erken word, word soos volg uiteengesit:

SLEUTELBRONNE VAN RAMINGSONSEKERHEID

Koste teenoor voordeel

Die Hoofbestuur is van mening dat weens die feit dat daar geen beduidende belanghebbendes in die organisasie is wat baat sal vind uit die billike waarde van die beleggingseiendom nie, sal die verkryging van jaarlikse waardasies vir elke eiendom, 'n buitensporige koste tot gevolg hê (deur middel van fooie vir die waardeerder) in vergelyking met die voordele wat die gebruikers van hierdie finansiële state sou ontvang vanuit die inligting.

Die Hoofbestuur het dus die koste teenoor voordeel beginsel toegepas ten opsigte van beleggingseiendomme. Gevolglik is beleggingseiendom na eiendom, aanleg en toerusting oorgedra en is dit volgens die toepaslike rekeningkundige beleid soos uiteengesit in aantekening 1.3.

1.2 Beleggingseiendom

Beleggingseiendom is grond en geboue wat gehou word om huurinkomste te verdien of vir kapitaalgroei of beide, eerder as vir gebruik in die produksie of verskaffing van goedere of dienste of vir administratiewe doeleindes, of vir verkoop in die gewone gang van sake.

Beleggingseiendom word aanvanklik teen kosprys gemeet en daarna teen billike waarde met veranderinge in billike waarde wat in wins of verlies erken word. Indien die billike waarde van beleggingseiendom nie betroubaar gemeet kan word sonder onnodige koste, word dit as eiendom, aanleg en toerusting gedra teen kosprys minus opgehoopte depresiasië en opgehoopte waardedaling gemeet.

1.3 Eiendom, aanleg en toerusting

Eiendom, aanleg en toerusting is tasbare bates wat die organisasie hou vir eie gebruik of vir verhuring aan ander en wat na verwagting vir meer as een tydperk gebruik sal word.

'n Item van eiendom, aanleg en toerusting word as 'n bate erken wanneer dit waarskynlik is dat toekomstige ekonomiese voordele wat verband hou aan die item na die organisasie sal vloei en die koste van die item betroubaar gemeet kan word.

An item of property, plant and equipment is recognised as an asset when it is probable that future economic benefits associated with the item will flow to the organisation, and the cost of the item can be measured reliably.

Property, plant and equipment is initially measured at cost.

Cost includes costs incurred initially to acquire or construct an item of property, plant and equipment and costs incurred subsequently to add to, replace part of, or service it. If a replacement cost is recognised in the carrying amount of an item of property, plant and equipment, the carrying amount of the replaced part is derecognised.

The initial estimate of the costs of dismantling and removing an asset and restoring the site on which it is located is also included in the cost of property, plant and equipment, when such dismantling, removal and restoration is obligatory.

Expenditure incurred subsequently for major services, additions to or replacements of parts of property, plant and equipment are capitalised if it is probable that future economic benefits associated with the expenditure will flow to the organisation and the cost can be measured reliably. Day to day servicing costs are included in profit or loss in the period in which they are incurred.

Property, plant and equipment is subsequently stated at cost less accumulated depreciation and any accumulated impairment losses, except for land which is stated at cost less any accumulated impairment losses.

Depreciation of an asset commences when the asset is available for use as intended by management. Depreciation is charged to write off the asset's carrying amount over its estimated useful life to its estimated residual value, using a method that best reflects the pattern in which the asset's economic benefits are consumed by the organisation.

The useful lives of items of property, plant and equipment have been assessed as follows:

ITEM	DEPRECIATION METHOD	AVERAGE USEFUL LIFE
Land and buildings	Straight line	0% - 10%
Plant and machinery	Straight line	20%
Furniture and fixtures	Straight line	20%
Motor vehicles	Straight line	20%
Office equipment	Straight line	20%
Computer equipment	Straight line	20%
Catering and other equipment	Straight line	20%
Computer software	Straight line	33%

When indicators are present that the useful lives and residual values of items of property, plant and equipment have changed since the most recent annual reporting date, they are reassessed. Any changes are accounted for prospectively as a change in accounting estimate.

Impairment tests are performed on property, plant and equipment when there is an indicator that they may be impaired. When the carrying amount of an item of property, plant and equipment is assessed to be higher than the estimated recoverable amount, an impairment loss is recognised immediately in profit or loss to bring the carrying amount in line with the recoverable amount.

An item of property, plant and equipment is derecognised upon disposal or when no future economic benefits are expected from its continued use or disposal. Any gain or loss arising from the derecognition of an item of property, plant and equipment, determined as the difference between the net disposal proceeds, if any, and the carrying amount of the item, is included in profit or loss when the item is derecognised.

Eiendom, aanleg en toerusting word aanvanklik teen kosprys gemeet.

Die kosprys sluit koste in wat aanvanklik aangegaan is om 'n item van eiendom, aanleg en toerusting te verkry of te bou en koste wat daarna aangegaan is om daarby toe te voeg, 'n deel daarvan te vervang, of dit te diens. Indien 'n vervangingskoste erken word in die drabedrag van 'n item van eiendom, aanleg en toerusting word die drabedrag van die vervangde gedeelte omgeswaai.

Die aanvanklike raming van die koste van afbreek en verwydering van 'n bate en die herstel van die terrein waarop dit geleë is, word ook by die kosprys van eiendom, aanleg en toerusting, ingesluit wanneer sodanige afbreek, verwydering en herstel verpligtend is.

Uitgawes wat daarna aangegaan is vir groot dienste, toevoegings tot of vervangings van dele van eiendom, aanleg en toerusting word gekapitaliseer indien dit waarskynlik is dat toekomstige ekonomiese voordele wat verband hou met die uitgawe na die organisasie sal vloei en die koste betroubaar gemeet kan word. Dag tot dag dienskoste word in die tydperk waarin dit aangegaan is by wins of verlies ingesluit.

Eiendom, aanleg en toerusting word gevolglik openbaar gemaak teen kosprys minus opgehoopte waardevermindering en enige opgehoopte waardedalingverliese, behalwe vir grond wat teen kosprys minus enige opgehoopte waardedalingverliese openbaar gemaak word.

Waardevermindering van 'n bate begin wanneer die bate beskikbaar is vir gebruik soos deur bestuur beoog. Waardevermindering word gehef om die drabedrag van die bate oor sy geskatte nuttige lewensduur af te skryf na sy geskatte reswaarde, deur gebruik te maak van 'n metode wat die patroon waarin die bate se ekonomiese voordele wat deur die organisasie opgeneem word, die beste reflekteer.

Die nuttige lewensduur van items van eiendom, aanleg en toerusting is soos volg geëvalueer:

ITEM	WAARDEVER- MINDERINGS- METODE	GEMIDDELDE WAARDEVER- MINDERINGS- KOERS
Grond en geboue	Reguitlyn	0% - 10%
Aanleg en masjinerie	Reguitlyn	20%
Meubels en toebehore	Reguitlyn	20%
Motorvoertuie	Reguitlyn	20%
Kantoortoerusting	Reguitlyn	20%
Rekenaartoerusting	Reguitlyn	20%
Spysenierings- en ander toerusting	Reguitlyn	20%
Rekenaarsagteware	Reguitlyn	33%

Wanneer aanwysers teenwoordig is dat die nuttige lewensduur en reswaardes van items van eiendom, aanleg en toerusting sedert die mees onlangse jaarlikse verslagdoeningsdatum verander het, word dit herevalueer. Enige veranderings word vooruitwerkend as 'n verandering in rekeningkundige raming verantwoord.

Waardedalingstoetse word uitgevoer op eiendom, aanleg en toerusting wanneer daar 'n aanduiding is dat waardedaling moontlik plaasgevind het. Wanneer die drabedrag van 'n item van eiendom, aanleg en toerusting se evaluasie hoër is as die beraamde verhaalbare bedrag, word 'n waardedalingverlies onmiddellik in wins of verlies erken om die drabedrag in lyn te bring met die verhaalbare bedrag.

'n Item van eiendom, aanleg en toerusting word omgeswaai wanneer dit verkoop word, of wanneer geen toekomstige ekonomiese voordele vanuit sy voortgesette gebruik of verkoop verwag word nie. Enige wins of verlies wat voortspruit uit die omswaai van 'n item van eiendom, aanleg en toerusting, wat bepaal word as die verskil tussen die netto opbrengs uit verkope, indien enige, en die drabedrag van die item, word by wins of verlies ingesluit wanneer die item omgeswaai word.

1.4 Financial instruments

INITIAL MEASUREMENT

Financial instruments are initially measured at the transaction price (including transaction costs except in the initial measurement of financial assets and liabilities that are measured at fair value through profit or loss) unless the arrangement constitutes, in effect, a financing transaction in which case it is measured at the present value of the future payments discounted at a market rate of interest for a similar debt instrument.

FINANCIAL INSTRUMENTS AT AMORTISED COST

These include loans, trade receivables and trade payables. Those debt instruments which meet the criteria in Section 11.8(b) of the standard, are subsequently measured at amortised cost using the effective interest method. Debt instruments which are classified as current assets or current liabilities are measured at the undiscounted amount of the cash expected to be received or paid, unless the arrangement effectively constitutes a financing transaction.

At each reporting date, the carrying amounts of assets held in this category are reviewed to determine whether there is any objective evidence of impairment. If there is objective evidence, the recoverable amount is estimated and compared with the carrying amount. If the estimated recoverable amount is lower, the carrying amount is reduced to its estimated recoverable amount, and an impairment loss is recognised immediately in profit or loss.

TRADE RECEIVABLES

Trade receivables are measured at initial recognition at fair value and subsequently calculated at amortised cost using the effective interest rate method. Appropriate provisions for estimated irrecoverable amounts are recognised in profit or loss when there is objective proof that the asset is unreachable. Significant financial problems of the debtor, the likelihood that the debtor will be declared bankrupt or undergo financial restructuring and default or arrears of payments are considered as indicators that trade debtors are subject to impairment. The recognised provisions are calculated as the difference between the asset's carrying amount and the present value of the estimated future cash flow, discounted at the effective interest rate method with initial recognition.

The carrying amount of the asset is reduced by the use of a provisioning account and the amount of the asset loss is recognised in profit or loss in operating expenses. When a trade debtor is irrecoverable, it becomes written off against the provisioning account for trade debtors. Amounts previously written off and thereafter are recognised as other income.

CASH AND CASH EQUIVALENTS

Cash and cash equivalents include cash on hand, demand deposits and other short-term highly liquid investments with original maturities of three months or less. Initial and subsequent measurement at fair value.

FINANCIAL INSTRUMENTS AT FAIR VALUE

All other financial instruments are measured at fair value through profit and loss.

TRADE PAYABLES

Trade payables are recognised initially at the transaction price and subsequently measured at amortised cost using the effective interest rate method.

1.5 Leases

A lease is classified as a finance lease if it transfers substantially all the risks and rewards incidental to ownership to the lessee. All other leases are operating leases. A lease is classified as an operating lease if it does not transfer substantially all the risks and rewards incidental to ownership.

1.4 Finansiële instrumente

AANVANKLIKE METING

Finansiële instrumente word aanvanklik gemeet teen die transaksieprys (insluitend transaksiekoste, behalwe in die aanvanklike meting van finansiële bates en laste wat gemeet word teen billike waarde deur wins of verlies) tensy die ooreenkoms, in effek, 'n finansieringstransaksie uitmaak in welke geval dit gemeet word teen die huidige waarde van die toekomstige betalings verdiskonteer teen 'n markkoers van rente vir 'n soortgelyke skuld-instrument.

FINANSIËLE INSTRUMENTE TEEN GEAMORTISEERDE KOSTE

Hierdie sluit in lenings, handelsdebiteure en handelskrediteure. Daardie skuld-instrumente wat voldoen aan die kriteria in Artikel 11.8(b) van die standaard, word daarna teen geamortiseerde koste gemeet deur gebruik te maak van die effektiwe rente-metode. Skuld-instrumente wat as bedryfsbates of -laste geklassifiseer is, word gemeet teen die onverdiskonteerde bedrag van die kontant wat verwag word om ontvang of betaal te word, tensy die ooreenkoms effektief 'n finansieringstransaksie uitmaak.

Op elke verslagdoeningsdatum, word die drabedrae van bates wat in hierdie kategorie gehou word hersien om te bepaal of daar enige objektiewe bewyse van waardedaling is. Indien daar objektiewe bewyse is, word die verhaalbare bedrag beraam en met die drabedrag vergelyk. Indien die beraamde verhaalbare bedrag laer is, word die drabedrag verminder na sy beraamde verhaalbare bedrag, en 'n waardedalingsverlies word onmiddellik in wins of verlies erken.

HANDELSDEBITEURE

Handelsdebiteure word met aanvanklike erkenning teen billike waarde gemeet en daarna teen die geamortiseerde koste bereken deur die effektiwe rentekoersmetode te gebruik. Toepaslike voorsiening vir beraamde onverhaalbare bedrae word in wins of verlies erken wanneer daar objektiewe bewys is dat die bate oninbaar is. Beduidende finansiële probleme van die debiteur, die waarskynlikheid dat die debiteur bankrot verklaar sal word of finansiële herorganisasie sal ondergaan en wanbetaling of agterstalligheid van betalings word as aanduiders beskou dat die handelsdebiteure aan waardedaling onderhewig is. Die erkende voorsienings word bereken as die verskil tussen die bate se drabedrag en die huidige waarde van die beraamde toekomstige kontantvloei, verdiskonteer teen die effektiwe rentekoersmetode met aanvanklike erkenning.

Die drabedrag van die bate word verminder deur die gebruik van 'n voorsieningsrekening en die bedrag van die verlies word in die wins of verlies in bedryfskoste erken. Wanneer 'n handelsdebiteur oninvorderbaar is, word dit afgeskryf teen die voorsieningsrekening vir handelsdebiteure. Bedrae wat voorheen afgeskryf is en daarna ingevorder word, word as ander inkomste erken.

KONTANT EN KONTANTEKWIVALENTE

Kontant en kontantekwivalente bestaan uit kontant voorhande en aanvraagdeposito's en ander hoogs likiede korttermynbeleggings wat gereedlik in 'n bekende kontantbedrag omskepbaar is en aan nietige risiko's ten opsigte van waardeverandering onderhewig is. Dit word aanvanklik en daarna teen billike waarde erken.

FINANSIËLE INSTRUMENTE TEEN BILLIKE WAARDE

Alle ander finansiële instrumente word deur wins en verlies teen billike waarde gemeet.

HANDELSKREDITEURE

Handelskrediteure word aanvanklik teen billike waarde gemeet en daarna teen geamortiseerde koste bereken deur die effektiwe rentekoersmetode te gebruik.

1.5 Hure

'n Huur word as 'n bruikhuur geklassifiseer as dit aansienlik al die risiko's en belonings verbonde aan eienskapskap aan die huurder oordra. Alle ander hure is bedryfshure.

OPERATING LEASES – LESSOR

Operating lease income is recognised as an income on a straight-line basis over the lease term unless:

- ▶ Another systematic basis is representative of the time pattern of the benefit from the leased asset, even if the receipt of payments is not on that basis, or
- ▶ the payments are structured to increase in line with expected general inflation (based on published indexes or statistics) to compensate for the lessor's expected inflationary cost increases.

Initial direct costs incurred in negotiating and arranging operating leases are added to the carrying amount of the leased asset and recognised as an expense over the lease term on the same basis as the lease income.

OPERATING LEASES – LESSEE

Operating lease payments are recognised as an expense on a straight-line basis over the lease term unless:

- ▶ Another systematic basis is representative of the time pattern of the benefit from the leased asset, even if the payments are not on that basis, or
- ▶ the payments are structured to increase in line with expected general inflation (based on published indexes or statistics) to compensate for the lessor's expected inflationary cost increases.

Any contingent rents are expensed in the period they are incurred.

1.6 Inventories

Inventories are measured at the lower of cost and estimated selling price less costs to complete and sell, on the weighted average cost basis.

1.7 Trust funds

Trust funds consist of trust funds invested and the corresponding trust creditors for the utilisation of funds for specific projects as approved by the Congress.

1.8 Impairment of non-financial assets

The organisation assesses at each reporting date whether there is any indication that property, plant and equipment may be impaired.

If there is any such indication, the recoverable amount of any affected asset (or group of related assets) is estimated and compared with its carrying amount. If the estimated recoverable amount is lower, the carrying amount is reduced to its estimated recoverable amount, and an impairment loss is recognised immediately in profit or loss.

If an impairment loss subsequently reverses, the carrying amount of the asset (or group of related assets) is increased to the revised estimate of its recoverable amount, but not in excess of the amount that would have been determined had no impairment loss been recognised for the asset (or group of assets) in prior years. A reversal of impairment is recognised immediately in profit or loss.

1.9 Employee benefits

SHORT-TERM EMPLOYEE BENEFITS

The cost of short-term employee benefits, (those payable within twelve months after the service is rendered, such as leave pay and sick leave, bonuses, and non-monetary benefits such as medical care), are recognised in the period in which the service is rendered and are not discounted.

1.10 Provisions and contingencies

Provisions are recognised when:

- ▶ The organisation has an obligation at the reporting date as a result of a past event;

BEDRYFSHURE – VERHUURDER

Bedryfshuurinkomste word as 'n inkomste op 'n reguitlyngrondslag oor die huurtermyn erken, behalwe as:

- ▶ 'n Ander sistematiese grondslag van die tydspatroom van die voordeel vanuit die huurbate verteenwoordigend is, selfs as die ontvangste van betalings nie op daardie grondslag is nie, of
- ▶ die betalings gestruktureer is om te verhoog in lyn met verwagte algemene inflasie (gebaseer op gepubliseerde indekse of statistieke) om te vergoed vir die verhuurder se verwagte inflasionêre stygings.

Aanvanklike direkte koste wat aangegaan is in die onderhandel en die reël van bedryfshure word by die drabedrag van die verhuurde bate getel en as 'n uitgawe erken oor die huurtermyn op dieselfde grondslag as die huurinkomste.

BEDRYFSHURE – HUURDER

Bedryfshuurbetalings word as 'n uitgawe op 'n reguitlyngrondslag oor die huurtermyn erken, behalwe as:

- ▶ 'n Ander sistematiese grondslag van die tydspatroom van die voordeel vanuit die huurbate verteenwoordigend is, selfs as die betaling nie op daardie grondslag is nie, of
- ▶ die betalings gestruktureer is om te verhoog in lyn met verwagte algemene inflasie (gebaseer op gepubliseerde indekse of statistieke) om te vergoed vir die verhuurder se verwagte inflasionêre stygings.

Enige voorwaardelike hure word 'n uitgawe in die tydperk waarin dit aangegaan is.

1.6 Voorraad

Voorraad word gemeet teen die laagste van die kosprys en beraamde verkoopsprys minus koste om te verkoop, op die geweege gemiddelde kostegrondslag.

1.7 Trustfondse

Trustfondse bestaan uit trustgelde wat op belegging geplaas word en die ooreenstemmende trustkrediteure vir die aanwending van die fondse vir spesifieke projekte soos goedgekeur deur die Kongres.

1.8 Waardedaling van bates

Die organisasie evalueer op elke verslagdoeningsdatum of daar enige aanduiding is dat eiendom, aanleg en toerusting se waarde mag daal.

Indien daar enige sodanige aanduiding is, word die verhaalbare bedrag van enige geraakte bate (of groep van verwante bates) beraam en met sy drabedrag vergelyk. Indien die beraamde verhaalbare bedrag laer is, word die drabedrag verminder na sy beraamde verhaalbare bedrag, en 'n waardedalingsverlies word onmiddellik in wins of verlies erken.

Indien 'n waardedalingsverlies daarna omswaai, word die drabedrag van die bate (of groep van verwante bates) verhoog na die hersiene beraming van sy verhaalbare bedrag, maar nie meer as die bedrag wat bepaal sou word indien geen waardedalingsverlies vir die bate (of groep van bates) in die vorige jare erken is nie. 'n Omswaai van waardedaling word onmiddellik in wins of verlies erken.

1.9 Werknemervoordele

KORTTERMYNWERKNEMERVoordele

Die koste van korttermynwerknemervoordele (daardie wat betaalbaar is binne twaalf maande nadat die diens gelewer is, soos betaalde verlof en siekverlof, bonusse en nie-monetêre voordele soos mediese sorg) word erken in die tydperk waarin die diens gelewer is en word nie verdiskonteer nie.

1.10 Voorsienings en gebeurlikhede

Voorsienings word erken wanneer:

- ▶ Die organisasie 'n verpligting het op die verslagdoeningsdatum as gevolg van 'n gebeurtenis in die verlede;

- it is probable that the organisation will be required to transfer economic benefits in settlement; and
- the amount of the obligation can be estimated reliably.

Provisions are measured at the present value of the amount expected to be required to settle the obligation using a pre-tax rate that reflects current market assessments of the time value of money and the risks specific to the obligation. The increase in the provision due to the passage of time is recognised as interest expense.

Provisions are not recognised for future operating losses.

1.11 Income

Income is defined as management fees, rental income and member contributions.

Other income consists of sponsorships, commercial income, other sundry income and cost recovery.

Income is calculated at the fair value of the consideration received or receivable and represents the receivables for services provided in the normal course of business, after deduction of value added tax.

When the outcome of the transaction involving the rendering of services cannot be estimated reliably, income shall be recognised only to the extent of the expenses recognised that are recoverable.

Membership contributions are voluntary and are accountable when the funds are received.

Rental income is calculated on an accrual basis in accordance with the essence of the applicable agreements recognised. Rental income is recognised on a straight-line basis over the rental period, even if payments are not made on a straightforward basis, or where payments are structured to increase in line with inflation.

Interest is recognised, in profit or loss, using the effective interest rate method.

Dividends are recognised, in profit or loss, when the organisation's right to receive payment has been established and is shown as other income.

- dit waarskynlik is dat die organisasie vereis sal word om ekonomiese voordeel oor te dra in vereffening; en
- die bedrag van die verpligting betroubaar beraam kan word.

Voorsienings word gemeet teen die huidige waarde van die bedrag wat na verwagting nodig sal wees om die verpligting te vereffen deur gebruik te maak van 'n voorbelaste koers wat die huidige markevaluering van die tydwaarde van geld en die risiko's eie aan die verpligting weerspieël. Die styging in die voorsiening weens tydsverloop word as 'n rente-uitgawe erken.

Voorsienings word nie vir toekomstige bedryfsverliese erken nie.

1.11 Inkomste

Inkomstes word gedefinieer as bestuursfooie, huurinkomste en ledebydrae.

Ander inkomste bestaan uit borgskappe, kommersiële inkomste, ander diverse inkomste en kosteverhaling.

Inkomste word bereken teen die billike waarde van die teenprestasie wat ontvang is of ontvangbaar is en verteenwoordig die ontvangbare bedrae vir dienste wat in die normale gang van sake verskaf word, na aftrekking van belasting op toegevoegde waarde.

Wanneer die uitslag van die transaksie wat dienslewering behels, nie betroubaar bereken kan word nie, word inkomste slegs erken ten opsigte van die erkende uitgawes wat verhaalbaar is.

Ledebydrae is vrywillig van aard en word verantwoord wanneer die fondse ontvang word.

Huurinkomste word op 'n toevallingsgrondslag in ooreenstemming met die wese van die toepaslike ooreenkomste erken. Huurinkomste word op 'n reguitlynggrondslag oor die huurtydperk erken, selfs al word die betalings nie op 'n reguitlynggrondslag ontvang nie, of waar betalings gestruktureer is om in lyn met inflasie toe te neem.

Rente word erken in wins of verlies deur gebruik te maak van die effektiwerentekoersmetode.

Dividende word erken in wins of verlies wanneer die organisasie se reg om betaling te ontvang, gevestig is.

Notes to the financial statements

Aantekeninge tot die finansiële state

for the year ended 30 September 2019

vir die jaar geëindig 30 September 2019

	2019 R	2018 R	
2. INVENTORY			2. VOORRAAD
Entertainment inventory	184 649	114 326	Onthaalvoorraad
Diesel	14 354	15 227	Diesel
	199 003	129 553	
3. TRADE AND OTHER RECEIVABLES			3. HANDELS- EN ANDER DEBITEURE
Trade receivables	6 301 506	6 443 931	Handelsdebiteure
Other debtors: projects	15 891 555	-	Ander debiteure: projekte
Prepaid expenses	795 151	636 950	Vooruitbetaalde uitgawes
Deposits	268 975	248 975	Deposito's
VAT	505 228	139 521	BTW
Income receivable	-	2 708 386	Inkomste ontvangbaar
Employee loans	310	620	Personeelennings
	23 762 725	10 178 383	
4. CASH AND CASH EQUIVALENTS			4. KONTANT EN KONTANTEKWIVALENTE
Cash and cash equivalents consist of:			Kontant en kontantekwivalente bestaan uit:
Cash on hand	7 291	6 032	Kontant voorhande
Bank balances	5 510 048	2 852 011	Bankrekening
Short term investments	12 704 672	12 762 290	Korttermynbeleggings
	18 222 011	15 620 333	

5. PROPERTY, PLANT AND EQUIPMENT

5. EIENDOM, AANLEG EN TOERUSTING

	2019			2018		
	COST PRICE KOSPRYS	ACCUMULATED DEPRECIATION OPGEHOOPTE WAARDEVER- MINDERING	CARRYING VALUE DRAWAARDE	COST PRICE KOSPRYS	ACCUMULATED DEPRECIATION OPGEHOOPTE WAARDEVER- MINDERING	CARRYING VALUE DRAWAARDE
Land and buildings/Grond en geboue	50 666 912	(23 892 462)	26 774 450	48 878 287	(22 149 819)	26 728 468
Machinery and equipment/ Aanleg en masjinerie	3 655 209	(2 446 182)	1 209 027	2 791 859	(2 080 219)	711 640
Furniture and fittings/ Meubels en toebehore	2 403 532	(1 939 704)	463 828	2 235 787	(1 794 926)	440 861
Motor vehicles/Motorvoertuie	700 565	(694 398)	6 167	700 565	(692 398)	8 167
Computer equipment/Rekenaartoeusting	3 594 620	(2 720 920)	873 700	3 372 757	(2 393 634)	979 123
Office equipment/Kantoortoeusting	425 398	(213 326)	212 072	268 990	(157 032)	111 958
Computer software/Rekenaarsagteware	1 249 446	(547 626)	701 820	793 996	(360 870)	433 126
Catering and other equipment/ Spysenierings- en ander toeusting	445 318	(312 151)	133 167	347 338	(281 234)	66 104
Total/Totaal	63 141 000	(32 766 769)	30 374 231	59 389 579	(29 910 132)	29 479 447

	OPENING BALANCE OPENINGSALDO	ADDITIONS BYVOEGINGS	DEPRECIATION WAARDEVER- MINDERING	CLOSING BALANCE EINDSALDO
Reconciliation of property, plant and equipment – 2019/ Rekonsiliasie van eiendom, aanleg en toeusting – 2019				
Land and buildings/Grond en geboue	26 728 468	1 788 625	(1 742 643)	26 774 450
Machinery and equipment/Aanleg en masjinerie	711 640	863 350	(365 963)	1 209 027
Furniture and fittings/Meubels en toebehore	440 861	168 642	(145 675)	463 828
Motor vehicles/Motorvoertuie	8 167	-	(2 000)	6 167
Computer equipment/Rekenaartoeusting	979 123	236 747	(342 170)	873 700
Office equipment/Kantoortoeusting	111 958	156 408	(56 294)	212 072
Computer software/Rekenaarsagteware	433 126	455 450	(186 756)	701 820
Catering and other equipment/Spysenierings- en ander toeusting	66 104	99 470	(32 407)	133 167
Total/Totaal	29 479 447	3 768 692	(2 873 908)	30 374 231

	OPENING BALANCE OPENINGSALDO	ADDITIONS BYVOEGINGS	DISPOSALS AFSKRYWING	DEPRECIATION WAARDEVER- MINDERING	CLOSING BALANCE EINDSALDO
Reconciliation of property, plant and equipment – 2018/Rekonsiliasie van eiendom, aanleg en toeusting – 2018					
Land and buildings/Grond en geboue	25 255 906	2 967 105	-	(1 494 543)	26 728 468
Machinery and equipment/Aanleg en masjinerie	760 777	259 879	-	(309 016)	711 640
Furniture and fittings/Meubels en toebehore	193 050	373 890	-	(126 079)	440 861
Motor vehicles/Motorvoertuie	-	10 000	-	(1 833)	8 167
Computer equipment/Rekenaartoeusting	1 083 350	233 516	(3 220)	(334 523)	979 123
Office equipment/Kantoortoeusting	13 005	115 152	-	(16 199)	111 958
Computer software/ Rekenaarsagteware	48 955	412 181	-	(28 010)	433 126
Catering and other equipment/Spysenierings- en ander toeusting	98 472	-	-	(32 368)	66 104
Total/Totaal	27 453 515	4 371 723	(3 220)	(2 342 571)	29 479 447

5. PROPERTY, PLANT AND EQUIPMENT (CONTINUED)

Land consists of the following:

1. Remainder of the farm Marthaville 911, Bothaville district, Free State Province.
2. Section 6 (of 2) of the farm Rietfontein Hart 512, Bothaville district, Free State Province.
3. Remainder of portion 2 of the farm Rietfontein Hart 512, Bothaville district, Free State Province.
4. The farm Nampo 1203, Bothaville district, Free State Province.
5. Remainder of the farm Doornpan Zuid 858, Bothaville district, Free State Province.
6. Section 3 of the farm Eden 327, Bothaville district, Free State Province.

5. EIENDOM, AANLEG EN TOERUSTING (VERVOLG)

Grond bestaan uit die volgende:

1. Restant van die plaas Marthaville 911, Bothaville-distrik, Vrystaatprovinsie.
2. Gedeelte 6 (van 2) van die plaas Rietfontein Hart 512, Bothaville-distrik, Vrystaatprovinsie.
3. Restant van gedeelte 2 van die plaas Rietfontein Hart 512, Bothaville-distrik, Vrystaatprovinsie.
4. Die plaas Nampo 1203, Bothaville-distrik, Vrystaatprovinsie.
5. Restant van die plaas Doornpan Zuid 858, Bothaville-distrik, Vrystaatprovinsie.
6. Gedeelte 3 van die plaas Eden 327, Bothaville-distrik, Vrystaatprovinsie.

	2019 R	2018 R	
6. OTHER FINANCIAL ASSETS			6. ANDER FINANSIËLE BATES
At fair value			Teen billike waarde
Sanlam Investment portfolio – Grain SA	31 592 666	30 668 828	Sanlam Beleggingsportefeulje – Graan SA
Sanlam Investment portfolio – Farmer development	5 127 601	4 982 190	Sanlam Beleggingsportefeulje – Ontwikkelende landbou
Senwesbel Limited – 32 062 shares @ R3,70 each (2018: 32 062 @ R5 each)	118 629	160 310	Senwesbel Limited – 32 062 aandele @ R3,70 elk (2018: 32 062 aandele @ R5 elk)
	36 838 896	35 811 328	
7. TRUST FUNDS			7. TRUSTFONDSE
Levy Fund			Heffingsfonds
Trust funds	20 393 980	23 115 137	Trustgelde
Trust payables	(20 393 980)	(23 115 137)	Trustkrediteure
	-	-	
Recapitalisation project (RECAP)			Herkapitaliseringsprojekte (RECAP)
Trust funds	889 048	1 556 271	Trustgelde
Trust payables	(889 048)	(1 556 271)	Trustkrediteure
	-	-	
Jobs Fund			Jobs Fund
Trust funds	-	21 116 428	Trustgelde
Trust payables	-	(21 116 428)	Trustkrediteure
	-	-	
Beyond Abundance			Beyond Abundance
Trust funds	26 545 969	-	Trustgelde
Trust payables	(26 545 969)	-	Trustkrediteure
	-	-	
REID			REID
Trust funds	312	1 395	Trustgelde
Trust payables	(312)	(1 395)	Trustkrediteure
	-	-	
Eastern Cape Mechanisation			Oos-Kaap Meganisasie
Trust funds	869 796	2 933 670	Trustgelde
Trust payables	(869 796)	(2 933 670)	Trustkrediteure
	-	-	
AB InBev			AB InBev
Trust funds	647 573	-	Trustgelde
Trust payable	(647 573)	-	Trustkrediteure
	-	-	

	2019 R	2018 R	
8. TRADE AND OTHER PAYABLES			8. HANDELS- EN ANDER KREDITEURE
Trade payables	5 367 953	4 793 656	Handelskrediteure
Income received in advance	33 459 213	17 799 542	Vooruitontvange inkomste
Nampo Geboue Proprietary Limited	2	2	Nampo Geboue Eiendoms Beperk
Accrued leave	2 485 645	2 427 826	Opgelope verlof
Employee cost	3 197 535	3 530 447	Werknemer koste
	44 510 348	28 551 473	
9. INCOME			9. INKOMSTE
Management fees	3 965 357	4 286 615	Bestuursfooie
Rental income	1 144 388	1 089 894	Huurinkomste
Membership contribution	17 003 960	17 138 696	Ledebydrae
	22 113 705	22 515 205	
10. OTHER INCOME			10. ANDER INKOMSTE
Other income	689 400	652 280	Ander inkomste
Sponsorships	5 811 007	6 998 620	Borgskappe
Commercial income	44 528 502	41 310 777	Kommersiële inkomste
Net levies fund income (supplementary information 2)	-	-	Netto heffingsfondsinkomste (aanvullende inligting 2)
Net project income (supplementary information 3)	-	-	Netto projekinkomste (aanvullende inligting 3)
Cost recovery/(project expenditure)	3 326 897	1 696 910	Kosteverhandeling/(projekbesteding)
Exchange profit	3 496	7 784	Valutawins
Profit on sale of assets	11 050	12 789	Wins met verkoop van bates
	54 370 352	50 679 160	
11. INVESTMENT INCOME			11. BELEGGINGSINKOMSTE
Dividend income			Dividendinkomste
Sanlam – Grain SA	419 521	290 248	Sanlam – Graan SA
Sanlam – Farmer Development	66 234	32 433	Sanlam – Ontwikkelende landbou
	485 755	322 681	
Finance income			Finansieringsinkomste
Sanlam – Grain SA	989 204	840 490	Sanlam – Graan SA
Sanlam – Farmer Development	96 667	54 828	Sanlam – Ontwikkelende landbou
	1 085 871	895 318	
	1 571 626	1 217 999	
12. FAIR VALUE ADJUSTMENTS			12. BILLIKEWAARDE-AANPASSING
Sanlam – Grain SA	264 543	71 270	Sanlam – Graan SA
Sanlam – Farmer Development	46 218	101 274	Sanlam – Ontwikkelende landbou
	310 761	172 544	
13. FINANCE COSTS			13. FINANSIERINGSKOSTE
Interest paid	-	540	Rente betaal

	2019 R	2018 R	
14. CASH GENERATED FROM OPERATIONS			14. KONTANT GEGENEREER DEUR BEDRYGWIGHEDE
Surplus before tax	2 218 947	3 710 340	Surplus voor belasting
Adjusted for:			Aanpassings vir:
Depreciation	2 873 908	2 342 571	Waardevermindering
Dividends received	(485 755)	(322 681)	Dividende ontvang
Interest received	(1 085 871)	(895 318)	Rente ontvang
Finance costs	-	540	Finansieringskoste
Fair value adjustment	(310 761)	(172 544)	Billikewaarde-aanpassing
Profit on foreign exchange	-	(7 784)	Wins met valutaverskil
Non-cash item: Reserves	-	4 000 000	Nie-kontant items: Reserwes
Profit on sale of asset	-	(12 789)	Wins met verkoop van bate
Change in working capital			Veranderings in bedryfskapitaal
Inventory	(69 450)	55 262	Voorraad
Trade and other receivables	(13 584 342)	(1 944 425)	Handels- en ander debiteure
Trade and other payables	15 958 875	459 758	Handels- en ander krediteure
	5 515 551	7 212 930	

15. CONTINGENT LIABILITY

No provision has been made for taxation, as Grain SA has acted in terms of an South African Revenue Services (SARS) letter dated 18 September 2006, according to which Grain SA is exempt from income tax in terms of section 10(1)(d)(iv)(bb) of the Act. The letter states, however, that the exemption will be reviewed when new regulations and legislation regarding the exemption are implemented. Section 10(1)(d)(iv)(bb) of the Income Tax Act was amended with effect from 2 November 2010 and Section 30B was implemented. Grain SA's tax status has not been confirmed by SARS since the Section 30B introduction.

A contingent liability exists for the possible under payment of income tax, as well as possible penalties and interest. At year-end, the possible income tax, penalties and interests were not accounted for in the financial statements. Certainty of the possible income tax, penalties and interest will only be obtained after the consideration of the application by SARS.

Grain SA submitted an application to SARS in June 2019 and is awaiting feedback. Meetings have been convened with the Executive and a committee was established in collaboration with management and professional service providers to drive the restructuring of the organisation in order to comply with the necessary amended legislation.

15. VOORWAARDELIKE AANSPEERLIKHEID

Geen voorsiening is vir belasting gemaak nie, aangesien Graan SA opgetree het in terme van 'n Suid-Afrikaanse Inkomstediens (SAID) skrywe, gedateer 18 September 2006, waarvolgens Graan SA vrygestel is van inkomstebelasting ingevolge van Artikel 10(1)(d)(iv)(bb) van die Wet. Die skrywe meld egter dat die vrystelling hersien sal word wanneer nuwe regulasies en wetgewing met betrekking tot die vrystelling geïmplementeer word. Artikel 10(1)(d)(iv)(bb) van die Inkomstebelastingwet is gewysig effektiewelik 2 November 2010 en Artikel 30B is geïmplementeer. Graan SA se belastingstatus is sedert die wetswysiging vir Artikel 30B nie deur SAID bevestig nie.

'n Voorwaardelike aanspreeklikheid bestaan ten opsigte van 'n moontlike onderbetaling van inkomstebelasting, asook moontlike boetes en rentes. Op jaareinde is geen teboekstelling van die moontlike inkomstebelasting, boetes en rentes in die finansiële state gemaak nie. Uitklaring van die moontlike inkomstebelasting, boetes en rentes sal eers verkry word na oorweging van die aansoek deur SAID.

Graan SA het in Junie 2019 'n aansoek by die SAID ingedien en wag op terugvoer. Vergaderings is belê met Hoof- en Dagbestuur en 'n komitee is aangestel wat besig is om in samewerking met bestuur en professionele diensverskaffers die herstrukturering van die organisasie te dryf om sodoende aan die nodige veranderde wetgewing te voldoen.

	2019 R	2018 R	
16. RELATED PARTIES			16. VERWANTE PARTYE
Relationships			Verwantskap
Subsidiary:			Filiaal:
Nampo Geboue Proprietary Limited			Nampo Geboue Eiendoms Beperk
Members of key management:			Sleutelbestuur:
The Kommersiële Wintergraan Produsente Trust			Die Kommersiële Wintergraan Produsente Trust
The Kommersiële Mielie Produsente Navorsingstrust			Die Kommersiële Mielie Produsente Navorsingstrust
Related party balances and transactions with entities with control, joint control or significant influence over the organisation			Verwante party balanse en transaksies met entiteite met beheer, gesamentlike beheer of beduidende invloed oor die organisasie
Related party balances			Verwantepartysaldo's
Amounts included in trade receivable (trade payable) regarding related parties			Bedrae ingesluit by handelsdebiteure (handelskrediteure) met betrekking tot verwante partye
Nampo Geboue Proprietary Limited	(2)	(2)	Nampo Geboue Eiendoms Beperk
Related party transactions			Verwantepartytransaksies
Income: The Kommersiële Wintergraan Produsente Trust			Inkomstes: Die Kommersiële Wintergraan Produsente Trust
Management fee	16 830	15 729	Bestuursfooi
Research projects	70 000	70 000	Navorsingsprojekte
Income: The Kommersiële Mielie Produsente Navorsingstrust			Inkomstes: Die Kommersiële Mielie Produsente Navorsingstrust
Management fee	167 382	137 441	Bestuursfooi
Research projects	1 686 940	1 987 000	Navorsingsprojekte
Management remuneration			Bestuursvergoeding
Executive and Management Committee of the Executive	1 968 047	2 213 620	Hoof- en Dagbestuur
Grain SA Management	12 880 387	11 592 967	Graan SA Bestuur

17. CATEGORIES OF FINANCIAL INSTRUMENTS

Categories of financial instruments – 2019

17. KATEGORIEË VAN FINANSIËLE INSTRUMENTE

Kategorieë van finansiële instrumente – 2019

	Notes	Aantekeninge				
		Financial assets at fair value through profit or loss Finansiële bates teen billike waarde deur wins of verlies	Financial assets at amortised cost Finansiële bates teen ge-amortiseerde koste	Financial liabilities at amortised cost Finansiële laste teen ge-amortiseerde koste	Equity and non-financial assets and liabilities Ekwiteit en finansiële bates en laste	
					Total Totaal	
ASSETS						
Non-current assets						
Property, plant and equipment	5	-	-	-	30 374 231	
Other financial assets	6	36 838 896	-	-	36 838 896	
		36 838 896	-	-	67 213 127	
Current assets						
Inventories	2	-	-	-	199 003	
Trade and other receivables	3	-	22 988 212	-	23 762 725	
Cash and cash equivalents	4	-	18 222 011	-	18 222 011	
		-	41 210 223	-	42 183 739	
Total assets		36 838 896	41 210 223	-	109 396 866	
EQUITY AND LIABILITIES						
Equity						
Reserves		-	-	-	8 500 000	
Accumulated surplus		-	-	-	56 386 518	
		-	-	-	64 886 518	
Total equity		-	-	-	64 886 518	
LIABILITIES						
Current liabilities						
Trade and other payables	8	-	-	38 827 166	5 683 182	
		-	-	38 827 166	5 683 182	
Total liabilities		-	-	38 827 166	70 569 700	
Total equity and liabilities		-	-	38 827 166	109 396 866	

BATES	
Nie-bedryfsbates	
Eiendom, aanleg en toerusting	5
Ander finansiële bates	6
Bedryfsbates	
Voorraad	2
Handels- en ander debiteure	3
Kontant en kontantekwivalente	4
Totale bates	
EKWITEIT EN AANSPREEKLIKHEDE	
Ekwiteit	
Reserves	
Behoue surplus	
Totale ekwiteit	
LASTE	
Bedryfslaste	
Handels- en ander krediteure	8
Totale laste	
Totale ekwiteit en aanspreeklikhede	

Aantekeninge

18. GOING CONCERN

The financial statements have been prepared on the basis of accounting policies applicable to a going concern. This basis presumes that funds will be available to finance future operations and that the realisation of assets and settlement of liabilities, contingent obligations and commitments will occur in the ordinary course of business.

The Executive believes that the organisation has sufficient financial resources to continue trading in the foreseeable future and accordingly the financial statements have been prepared on a going concern basis.

The Executive is satisfied that the organisation has a sound financial position and that it has access to sufficient loan facilities to comply with all foreseeable cash requirements. The Executive is not aware of any new material changes that may adversely affect the organisation.

The Executive is also not aware of any material non-compliance with statutory or regulatory requirements or any pending changes to legislation that may affect the organisation, except for the contingent liability as disclosed in note 15.

19. EVENTS AFTER THE REPORTING PERIOD

The Executive is not aware of any material event which occurred after the reporting date and up to the date of this report that would have a material impact on these financial statements, except for the contingent liability as disclosed in note 15.

20. POST-EMPLOYMENT BENEFIT

The permanent employees belong to the pension fund which is a fixed contribution plan and is subject to the Pension Funds Act.

18. LOPENDE SAAK

Die finansiële state is opgestel op grond van die rekeningkundige beleid wat op 'n lopende saak van toepassing is. Die grondslag veronderstel dat fondse beskikbaar sal wees om toekomstige bedrywighede te finansier en dat die realisering van bates en vereffening van laste, voorwaardelike verpligtinge en aanspreeklikhede in die gewone gang van sake sal plaasvind.

Die Hoofbestuur glo dat die organisasie oor voldoende finansiële hulpbronne beskik om voort te gaan met handel in die afsienbare toekoms en dienoreenkomstig is die finansiële state op 'n lopendesaa grondslag voorberei.

Die Hoofbestuur is tevrede dat die organisasie oor 'n gesonde finansiële posisie beskik en dat dit toegang het tot voldoende leningsfasiliteite om alle afsienbare kontant vereistes na te kom.

Die Hoofbestuur is nie bewus van enige nuwe wesenlike veranderings wat die organisasie nadelig kan affekteer nie. Die Hoofbestuur is ook nie bewus van enige wesenlike nie-voldoening aan statutêre of regulatoriese vereistes of enige hangende veranderings aan wetgewing wat die organisasie kan affekteer nie, behalwe die voorwaardelike aanspreeklikheid soos geopenbaar in aantekening 15.

19. GEBEURE NA VERSLAGDOENINGSDATUM

Die Hoofbestuur is nie bewus van enige wesenlike gebeurlikhede wat plaasgevind het na die verslagdoeningsdatum tot en met die datum van hierdie verslag nie, behalwe die voorwaardelike aanspreeklikheid soos geopenbaar in aantekening 15.

20. NADIENSVORDELE

Die permanente werknemers behoort aan die pensioenfonds wat 'n vastebydraeplan is en onderhewig is aan die Wet op Pensioenfondse.



Supplementary information

Aanvullende inligting

for the year ended 30 September 2019

vir die jaar geëindig 30 September 2019

	2019 R	2018 R	
Income			Inkomste
Management fee	3 965 357	4 286 615	Bestuursfooï
Rental income	1 144 388	1 089 894	Huurinkomste
Members' contribution	17 003 960	17 138 696	Ledebydrae
	22 113 705	22 515 205	
Other income			Ander inkomste
Other income	689 400	652 280	Ander inkomste
Fair value adjustment	310 761	172 544	Billikewaarde-aanpassings
Sponsorships	5 811 007	6 998 620	Borgskappe
Dividend received	485 755	322 681	Dividende ontvang
Interest received	1 085 871	895 318	Rente ontvang
Commercial income	44 528 502	41 310 777	Kommersiële inkomste
Cost recovery/(project expenditure)	3 326 897	1 696 910	Kosteverhaling/(projekbesteding)
Net levy fund income (supplementary information 2)	-	-	Netto heffingsfonds-inkomste (aanvullende inligting 2)
Net project income (supplementary information 3)	-	-	Netto projekinkomste (aanvullende inligting 3)
Profit on exchange differences	3 496	7 784	Valutawins
Profit on sale of assets	11 050	12 789	Wins met verkoop van bates
	56 252 739	52 069 703	
Expenses (Refer to page 111)	(76 147 497)	(70 874 028)	Uitgawes (Verwys na bladsy 111)
Operating surplus	2 218 947	3 710 880	Bedryfsurplus
Finance costs	-	(540)	Finansieringskoste
Surplus for the year	2 218 947	3 710 340	Surplus vir die jaar

The supplementary information does not form part of the financial statements and is unaudited.

Die aanvullende inligting vorm nie deel van die finansiële state nie en is nie geaudit nie.

	2019 R	2018 R	
Operating expenses			Bedryfskoste
Bank charges	130 521	109 971	Bankkoste
Investment fee	373 758	369 198	Beleggingsfooi
Marketing and sponsorships	3 629 778	2 782 784	Bemarking en borgskappe
Fuel	93 331	49 829	Brandstof
Service agreements	252 025	257 877	Dienste-ooreenkomste
Printing and stationery	274 336	276 373	Drukwerk en skryfbehoeftes
Electricity	205 042	191 060	Elektrisiteit
Functions and entertainment	2 871 966	3 917 487	Funksies en onthaal
Levies: Office park	667 282	628 077	Heffings: Kantoorpark
Repairs and maintenance	2 975 755	2 869 234	Herstelwerk en instandhouding
Clothing	117 003	122 486	Kleredrag
Commercial expenses	21 974 222	19 863 594	Kommersiële uitgawe
Membership and affiliation	1 490 366	1 288 953	Lidmaatskap en affiliasie
Market information	55 644	16 875	Markinligting
Training	416 856	356 144	Opleiding
Auditors' fees	347 670	342 295	Ouditeursvergoeding
Professional services	1 082 084	584 397	Professionele dienste
Travel costs and accommodation	498 584	500 419	Reiskoste en verblyf
Computer expenses	1 970 229	2 163 492	Rekenaaruitgawes
Security	27 555	19 866	Sekuriteit
Cleaning costs	208 787	161 265	Skoonmaakcostes
Bad debt	15 122	10 630	Slegte skuld
Telephone and fax	289 618	714 217	Telefoon en faks
Foreign exchange loss	9 170	14 315	Valutaverlies
Meeting costs	4 037 518	4 149 086	Vergaderingskoste
Insurance	449 417	475 327	Versekering
Refreshments	95 631	94 034	Verversings
Depreciation	2 873 908	2 342 571	Waardevermindering
Employee costs	28 714 319	26 202 172	Werknemerkoste
	76 147 497	70 874 028	

The supplementary information does not form part of the financial statements and is unaudited.

Die aanvullende inligting vorm nie deel van die finansiële state nie en is nie geaudit nie.

	2019 R	2018 R	
1. LEVY FUND			1. HEFFINGSFONDS
Balance at the beginning of the year	23 115 137	23 025 215	Openingsbalans
Received from prior year	3 649 069	2 853 516	Ontvang van vorige jaar
Receipts/(payments)			Ontvangstes/(betalings)
Levies received	18 092 053	18 893 678	Heffings
Interest received Absa	798 672	642 819	Rente Absa
Return on investment: Sanlam	381 259	220 730	Opbrengs: Sanlam
Membership fees	(2 797 000)	(2 971 000)	Ledegeld
Membership fees less than R1 000	(671 290)	(640 998)	Ledegeld minder as R1 000
Industry services	(7 353 146)	(8 087 554)	Bedryfsbediening
Farmer development	-	(525 000)	Ontwikkelande landbou
Members benefits	(670 911)	(627 020)	Ledevoordele
Legal aid	(40 335)	(74 385)	Regshulp
Provincial Agricultural Union Affiliation	-	(8 478)	Provinsiale landbou-unie-affiliasies
5% Branch funding	(475 499)	(333 405)	5% Takbefondsing
Marketing	(2 123 561)	(1 797 479)	Bemarking
Grain SA Management fee	(1 809 205)	(1 658 672)	Graan SA Bestuursfooi
Levy fund 2018 surplus to Grain SA	(2 710 053)	(2 300 311)	Heffingsfonds 2018 surplus na Graan SA
Amount payable to Levy fund at year end	(6 991 209)	(3 496 520)	Bedrae verskuldig aan Heffingsfonds op jaareinde
	20 393 981	23 115 136	
Levy fund invest at:			Heffingsfondsgelde belê by:
Absa	7 932 396	11 015 717	Absa
Sanlam	12 461 585	12 099 419	Sanlam
	20 393 981	23 115 136	
2. LEVY FUND INCOME (OTHER INCOME)			2. HEFFINGSFONDS (ANDER INKOMSTE)
Income	1 434 489	1 118 150	Inkomste
Expenses	(1 434 489)	(1 118 150)	Uitgawes
	-	-	
3. PROJECTS			3. PROEKE
Income	40 666 481	40 657 927	Inkomste
Expenses	(40 666 481)	(40 657 927)	Uitgawes
	-	-	

The supplementary information does not form part of the financial statements and is unaudited.

Die aanvullende inligting vorm nie deel van die finansiële state nie en is nie geaudit nie.

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