ANNUAL REPORT
JAARVERSLAG

2018

GRAIN SA
GRAAN SA

2017/2018 in focus

2017/2018 in fokus

How will the agricultural scene develop and is there **light on the horizon**? Only the future will tell. However, Grain SA as a producer organisation, and as part of the greater agricultural family, played an active role in carrying the cause of the grain producer into the land debate this year.

Hoe gaan die landboutoneel ontvou en is daar **lig op die horison**? Net die toekoms sal dit leer. Graan SA het egter as produsente-organisasie en as deel van die groter landboufamilie vanjaar 'n aktiewe rol gespeel om die saak van die graanprodusent in die gronddebat uit te dra.

This **focus circle** directs the attention to the land debate – which came to a head during the reporting period. Few things depict the sense of vocation of an agriculturalist better than a young plant greeting the new season with hope.

Dié **fokussirkel** vestig die aandag op die gronddebat – wat in die verslagtydperk op die spits gedryf is. Min dinge kan die geroepenheid van 'n landbouer beter uitbeeld as 'n jong plant wat met hoop die nuwe seisoen begroet.

Sustainable food production is essential for South Africa to maintain its status as a country with **food security**.

Volhoubare voedselproduksie is noodsaaklik ten einde Suid-Afrika se status as 'n land met **voedselsekerheid** te kan handhaaf.

The expropriation without compensation theme placed the extremely emotional **land issue** strongly in the spotlight this year. Diverging views and beliefs – positive and negative – place a cloud of uncertainty over the ownership of land and the effect this could have on the profitability and viability of the sector.

Die onteiening sonder vergoeding-tema het vanjaar die hoogs emosionele **grondkwessie** sterk op die voorgrond geplaas. Uiteenlopende sienings en oortuigings – positief en negatief – plaas 'n wolk van onsekerheid oor die eienaarskap van grond en die uitwerking wat dit op die winsgewendheid en lewensvatbaarheid van die sektor kan hê.

CONTENTS
INHOUD

4 Grain SA in a nutshell
Graan SA in 'n neutedop

6 The Executive and Executive Committee
Hoof- en Dagbestuur

8 Message from the Chairperson
Boodskap van die Voorsitter

12 Chief Executive Officer's review and strategic objectives
Uitvoerende Hoofbestuurder se terugblik en strategiese oogmerke

20 Management report per division
Bestuursverslag per afdeling

- **20** GRAIN ECONOMY AND MARKETING
  GRAANEKONOMIE EN BEMARKING
  A year of many highlights
  'n Jaar van vele hoogtepunte
- **38** GRAIN RESEARCH AND POLICY CENTRE
  GRAANNAVORSING EN BELEIDSENTRUM
  Major progress in research facilitation
  Groot vordering met navorsingsfasilitering
- **46** FARMER DEVELOPMENT
  LANDBOU-ONTWIKKELING
  Growing food, growing people and growing prosperity
  Produseer voedsel, ontwikkel mense en skep welvaart
- **70** CORPORATE SERVICES
  KORPORATIEWE DIENSTE
  Building a profitable grain industry
  Bou 'n winsgewende graanbedryf

78 Market overview for the 2017/2018 production season
Markoorsig vir die 2017/2018-produksieseisoen
Moisture deficiency affects results
Tekort aan vog affekteer resultate

88 Input and production overview
Inset- en produksie-oorsig
Sustainable crop production under pressure
Volhoubare gewasproduksie onder druk

108 Corporate Governance Report
Verslag oor Korporatiewe Beheer
Good corporate governance of paramount importance to Grain SA
Goeie korporatiewe beheer uiters belangrik vir Graan SA

109 Financial statements
Finansiële state

110 FINANCIAL SERVICES
FINANSIËLE DIENSTE
Excellent results at year-end
Uitstekende resultate op jaareinde

114 STATEMENT OF RESPONSIBILITY OF THE EXECUTIVE
VERKLARING VAN VERANTWOORDELIKHEID VAN HOOFBESTUUR

116 COMPOSITION OF THE EXECUTIVE
SAMESTELLING VAN HOOFBESTUUR

117 EXECUTIVE'S REPORT
HOOFBESTUUR SE VERSLAG

118 INDEPENDENT AUDITOR'S REPORT
ONAFHANKLIKE OUDITEUR SE VERSLAG

121 SUMMARY OF FINANCIAL STATEMENTS
OPSOMMING VAN FINANSIËLE STATE

124 ACCOUNTING POLICIES
REKENINGKUNDIGE BELEID

129 NOTES TO THE FINANCIAL STATEMENTS
AANTEKENINGE TOT DIE FINANSIËLE STATE

138 SUPPLEMENTARY INFORMATION
AANVULLENDE INLIGTING

GRAIN SA
GRAAN SA

IN A NUTSHELL
IN 'N NEUTEDOP

VISION / VISIE

Sustainable grain and oilseed production

Volhoubare graan- en oliesadeproduksie

BUILT ON / GEBOU OP

Voluntary association serving as mouthpiece of grain producers to promote their interests

Vrywillige organisasie wat dien as mondstuk vir graanprodusente om hul belange te bevorder

Autonomous and **independent** organisation

Outonome en **onafhanklike** organisasie

Apolitical and issues are dealt with only on merit

Apolities en sake word aangespreek slegs op meriete

Controlled by **producers** for producers

Beheer deur **produsente** vir produsente

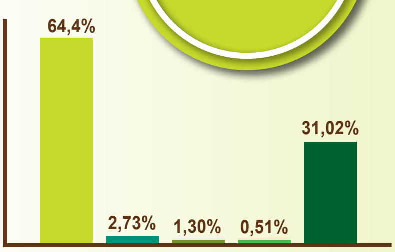
OUR VALUES / ONS WAARDES

Our values	Ons waardes
Visionary	Visionêr
Integrity	Integriteit
Leadership	Leierskap
Courage	Dapperheid
Partnerships	Vennootskappe
Vibrant	Lewenskragtig
Good governance	Goeie korporatiewe bestuur
Responsible	Verantwoordelik
Innovative	Innoverend
Communication	Kommunikasie

FOCUS AREAS / FOKUSAREAS

- Profitability / Winsgewendheid
- People / Mense
- Planet / Omgewing

WE REPRESENT / ONS VERTEENWOORDIG



Subsistence farmers / Bestaansboere	**12 945 > 0,5 to/tot 10 ha**	Including 5 215 supported by Jobs Fund project / Insluitend 5 215 ondersteun deur Jobs Fund-projek
Smallholder farmers / Kleinskaalse boere	**550 > 10 ha to/tot 100 ha**	
Potential commercial farmers / Potensiële kommersiële boere	**263 > 100 ha to/tot 250 ton**	
New era farmers / Nuwe era-boere	**103**	
Commercial producers / Kommersiële produsente	**6 235**	

OUR COMMODITIES
ONS KOMMODITEITE

WHEAT | KORING

HARVESTING&PLANTING
OES&PLANT

mar apr may jun jul aug sep oct nov dec jan feb

Bread • flour • animal feeds
Brood • meel • dierevoer

AVERAGE PRODUCTION | GEMIDDELDE PRODUKSIE = 1,7 M TON

MAIZE | MIELIES

HARVESTING&PLANTING
OES&PLANT

mar apr may jun jul aug sep oct nov dec jan feb

Maize meal • animal feeds
Mieliemeel • dierevoer

AVERAGE WHITE | GEMIDDELD WIT = 7,3 M TON
AVERAGE YELLOW | GEMIDDELD GEEL = 5 M TON

AVERAGE PRODUCTION | GEMIDDELDE PRODUKSIE = 12,3 M TON

SOYBEAN | SOJABONE

HARVESTING&PLANTING
OES&PLANT

mar apr may jun jul aug sep oct nov dec jan feb

Soy milk • food protein • animal feeds
Sojamelk • voedselproteïen • dierevoer

AVERAGE PRODUCTION | GEMIDDELDE PRODUKSIE = 800 K TON

SUNFLOWER | SONNEBLOM

HARVESTING&PLANTING
OES&PLANT

mar apr may jun jul aug sep oct nov dec jan feb

Sunflower oil • animal feeds
Sonneblomolie • dierevoer

AVERAGE PRODUCTION | GEMIDDELDE PRODUKSIE = 609 K TON

BARLEY | GARS

HARVESTING&PLANTING
OES&PLANT

mar apr may jun jul aug sep oct nov dec jan feb

Beer • baking • animal feeds
Bier • bak • dierevoer

AVERAGE PRODUCTION | GEMIDDELDE PRODUKSIE = 297 K TON

SORGHUM

HARVESTING&PLANTING
OES&PLANT

mar apr may jun jul aug sep oct nov dec jan feb

Beer • mabele • bio-fuel
Bier • mabella • biobrandstof

AVERAGE PRODUCTION | GEMIDDELDE PRODUKSIE = 173 K TON

CANOLA | KANOLA

HARVESTING&PLANTING
OES&PLANT

mar apr may jun jul aug sep oct nov dec jan feb

Canola oil • animal feeds
Kanola-olie • dierevoer

AVERAGE PRODUCTION | GEMIDDELDE PRODUKSIE = 110 K TON

GROUNDNUTS | GRONDBONE

HARVESTING&PLANTING
OES&PLANT

mar apr may jun jul aug sep oct nov dec jan feb

Nut oil • food • flour • animal feeds
Neutolie • voedsel • meel • dierevoer

AVERAGE PRODUCTION | GEMIDDELDE PRODUKSIE = 61 K TON

EXECUTIVE
HOOFBESTUUR

FRONT VOOR

Andries Theron
CO-OPTED: SPECIALIST REPRESENTATIVE FOR WINTER CEREALS
GEKOÖPTEER: SPESIALISVERTEENWOORDIGER VIR WINTERGRANE

Kallie Schoeman
REGION 9
STREEK 9

Chris Schoonwinkel
REGION 21
STREEK 21

Jannie de Villiers
CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER

Preline Swart
VICE-CHAIRPERSON
VISEVOORSITTER

Jaco Minnaar
CHAIRPERSON
VOORSITTER

Derek Mathews
VICE-CHAIRPERSON
VISEVOORSITTER

Ramodisa Monaisa
REPRESENTATIVE: FARMER DEVELOPMENT
VERTEENWOORDIGER: LANDBOU-ONTWIKKELING

Anton Botha
REGION 20
STREEK 20

Richard Krige
REGION 27
STREEK 27

MIDDLE MIDDEL

Sarel Haasbroek
REGION 7
STREEK 7

Stephen Krüger
REGION 23
STREEK 23

Deon Bergh
REGION 3
STREEK 3

Gerrit Roos
REGION 11
STREEK 11

Jan George Pretorius
REGION 5
STREEK 5

Marnus Bothma
REGION 1
STREEK 1

Gerhard Bruwer
REGION 25
STREEK 25

Michel Gildenhuys
REGION 32
STREEK 32

Ryk Pretorius
REGION 10
STREEK 10

Jaco Breytenbach
REGION 19
STREEK 19

Ralf Küsel
REGION 14
STREEK 14

Ramoso Pholo
REGION 28
STREEK 28

Danie Reichel
REGION 4
STREEK 4

BACK AGTER

Israel Motlhabane
REGION 31
STREEK 31

Paul Zietsman
REGION 15
STREEK 15

André Kirsten
REGION 26
STREEK 26

Jeremia Mathebula
REGION 29
STREEK 29

Jaap van der Westhuizen
REGION 16
STREEK 16

Danie Minnaar
REGION 24
STREEK 24

Joseph Swanepoel
REGION 8
STREEK 8

Neil Claassen
REGION 18
STREEK 18

Rudolf Fourie
REGION 12
STREEK 12

Willem Groothof
REGION 13
STREEK 13

Niël Rossouw
REGION 6
STREEK 6

Willie Marais
REGION 22
STREEK 22

Paul Corver
REGION 17
STREEK 17

Jozeph du Plessis
REGION 2
STREEK 2

Vacant/Vakant
REGION 30
STREEK 30

MANAGEMENT COMMITTEE OF THE EXECUTIVE
DAGBESTUUR

FRONT
VOOR

Preline Swart
VICE-CHAIRPERSON
VISEVOORSITTER

Jaco Minnaar
CHAIRPERSON
VOORSITTER

Derek Mathews
VICE-CHAIRPERSON
VISEVOORSITTER

Anton Botha
REGION 20
STREEK 20

BACK
AGTER

Chris Schoonwinkel
REGION 21
STREEK 21

Jannie de Villiers
CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER

Richard Krige
REGION 27
STREEK 27

Ramodisa Monaisa
REPRESENTATIVE:
FARMER DEVELOPMENT
VERTEENWOORDIGER:
LANDBOU-ONTWIKKELING

LAND DEBATE FANS WINDS OF CHANGE

GRONDDEBAT LAAT WINDE VAN VERANDERING OPSTEEK

The summer production areas of the country were greeted with a late season in the 2017/2018 production year. After the previous season's record crop and subsequently large carryover stock, an average maize crop was eventually produced.

A combination of prices moving closer to export parity, an exchange rate that was difficult to predict and an increase in the price levels of inputs due to the high price of Brent crude oil placed producers' profitability under pressure.

In the winter cereals production region conditions were more promising, and after good rains had been received in certain parts an outstanding crop was expected. However, the Southern Cape could not avoid the dry conditions early in the season. Strong winds and frost throughout the Western Cape during harvesting then damaged the expected good harvest.

Jaco Minnaar
CHAIRPERSON
VOORSITTER

On the eve of an election year and with all the political posturing in the run-up, we expected controversial statements by politicians. However, the winds of change suddenly appearing on the political horizon after the ANC conference in 2017 and the subsequent outcomes so far have changed the landscape dramatically. However, with uncertainty, ambiguity and concomitant scepticism about the future of the country on the rise.

When Parliament adopted a motion on the expropriation of land without compensation on 27 February 2018, it caused a whirlwind in the grain industry that blew into the Grain SA Congress early in March. Congress adopted an amended motion on land reform after long discussions with both commercial and developing grain producers resulting in a motion on which all parties could agree. This emphasised how important unity in agriculture is – and the necessity for dialogue to build the future of the sector.

In the subsequent weeks and months Grain SA's leadership and executive management worked tirelessly with Agri SA and other role-players in the greater agricultural family to carry the resolution by Congress clearly into the land debate. **This was a solid process of consultation and participation in which proper and well-thought-out inputs were provided.**

Although it is a challenge to measure the impact of all these actions, we met people during this debate with whom we have reached consensus, with whom one can debate – people who have the same vision as we have for South Africa. There is no doubt that we have to deal properly and carefully with all the inhumane emotions of the past. However, we must also reflect carefully on the future of our children and food security.

Regardless of our differing backgrounds and histories, we all recognise the need for accelerated land reform. I think we all realise the essence of giving all citizens the opportunity to own property and then also to protect their rights associated with this ownership.

Die somerproduksiestreke van die land is in die 2017/2018-produksiejaar deur 'n laat seisoen begroet. Ná die vorige seisoen se rekordoes en gevolglike groot oordragvoorrade, is 'n gemiddelde mielieoes uiteindelik geproduseer.

'n Kombinasie van pryse wat nader aan uitvoerpariteit beweeg het, 'n moeilik-voorspelbare wisselkoers en 'n toename in die prysvlakke van insette weens die hoë Brent-ruolieprys, het produsente se winsgewendheid onder druk geplaas.

In die wintergraanproduksiestreek het toestande meer belowend vertoon en ná goeie reëns in sekere dele ontvang is, is 'n voortreflike oes verwag. Die Suid-Kaap kon egter nie die droë toestande vroeg in die seisoen vryspring nie. Hierna het sterk winde en rypskade regdeur die Wes-Kaap tydens oestyd die verwagte goeie oeste 'n knou toegedien.

Aan die vooraand van 'n verkiesingsjaar en met al die politiekery wat dit voorafgaan, was ons omstrede uitsprake deur politici te wagte. Die winde van verandering wat eensklaps op die politieke horison verskyn het sedert die ANC-konferensie in 2017 en die uiteindelike uitkoms daarna, het die landskap egter dramaties verander – met onsekerheid, dubbelsinnigheid en gepaardgaande skeptisisme oor die toekoms van die land.

Toe die Parlement op 27 Februarie 2018 'n mosie van onteiening van grond sonder vergoeding aanvaar het, het dit in die graanbedryf 'n warrelwind veroorsaak wat vroeg in Maartmaand in die Graan SA Kongres ingewaai het. Kongres het 'n mosie oor grondhervorming goedgekeur nadat lang gesprekke met beide kommersiële en ontwikkelende graanprodusente gelei het tot 'n gewysigde mosie deur alle partye ooreengekom. Dit het uitgewys hoe belangrik eenheid in landbou is – en die noodsaaklikheid van dialoog as boustene vir die toekoms van die sektor.

In die weke en maande wat hierop gevolg het, het Graan SA se leierskap en uitvoerende bestuur onverpoos saam met Agri SA en ander rolspelers in die groter landboufamilie gewerk om die kongresbesluit suiwer in die gronddebat in te dra. **Dit was 'n soliede proses van konsultasie en deelname waarin behoorlike en deurdagte insette gemaak is.**

Hoewel die impak van al die aksies moeilik meetbaar is, het ons in hierdie debat mense ontmoet met wie ons konsensus het; met wie 'n mens kon redeneer – mense wat dieselfde visie as ons vir Suid-Afrika het. Daar is geen twyfel dat ons behoorlik en omsigtig met al die onmenslike emosies van die verlede moet handel nie. Ons moet egter ook versigtig oor die toekoms van ons kinders en voedselsekerheid nadink.

Ongeag ons verskillende agtergronde en geskiedenisse, erken ons almal die behoefte aan versnelde grondhervorming. Ek dink ons almal sien die essensie daarvan om aan alle landsburgers die geleentheid te gee om eiendom te besit en dan ook hul regte verbonde daaraan te beskerm.

Strategic planning

Grain SA's Executive Committee made time to formulate the organisation's strategic vision and long-term strategy this year. Sustainable grain and oilseeds production still forms the basis and core focus of our strategy. With this guideline, medium and short-term plans can be compiled to achieve our goals for 2023.

The organisation continuously plays a significant role at different levels to promote the sustainability of the producer. I would like to encourage you to read through the reports from the chief executive officer and every divisional head contained in this report. From these you will learn about the scope, depth and value of this organisation to us as grain producers.

I am of the opinion that Grain SA properly fulfilled its function as watchdog for the grain and oilseeds industry during the reporting period. Measures have been taken to ensure the quality of inputs, to make market information available as well as to promote it and to contribute to ensuring transparency in the grain market. Grain SA even did not hesitate to bring a successful court action against the Minister of Agriculture, Forestry and Fisheries when role-players tried to stop the application for the breeding and technology levy on soybeans.

The legitimacy and sustainability of the crop estimate process must be protected at all costs. At one stage the payment of service providers by a government institution fell behind, but this was fortunately resolved through the mediation of the National Agricultural Marketing Council. Grain SA will continue to ensure that instruments like the national crop estimate are maintained. Grain SA will also encourage role-players and participants to be involved to ensure that information from the Crop Estimates Committee is as accurate as possible.

Grain SA's priority focus areas with respect to research are crop improvement, crop protection, biosecurity, climate change and conservation agriculture. Good progress was made with the establishment of several research consortiums, and the research flowing from this has commenced. Recognition is given to various role-players from the public and private sector for their funding and effective partnerships.

The organisation offers various platforms to promote dialogue, establish interfaces and give recognition for achievements by producers. It was a privilege to receive our members from the Western Cape at this year's first NAMPO Cape in Bredasdorp. The cornerstone laid here promises to provide a partnership that will undoubtedly become an annual event.

To a voluntary producer organisation like Grain SA is it essential to ensure at all times that our operations are at optimal levels. Good progress was made during the review period with the streamlining of certain aspects. Our membership list was cleaned up with the support of Executive members. A benchmark of the organisation's information technology and telecommunications led to a switch to new suppliers. The implementation of Phase 1 of a new integrated financial system was also completed successfully.

Our member marketing team, in collaboration with the recruitment agents, achieved and surpassed the budgeted member levy targets. This, together with internal savings and reduced spending, meant that a deficit budget could be changed into a year-end that ended with a surplus. Good corporate governance and careful financial controls again ensured that Grain SA received unqualified audits for the organisation's financial statements and those of the Jobs Fund project.

Strategiese beplanning

Graan SA se Dagbestuur het vanjaar tyd ingeruim om die organisasie se strategiese visie en langtermynstrategie te formuleer. Volhoubare graan- en oliesadeproduksie vorm steeds die grondslag en kernfokus van ons strategie. Met dit as riglyn kan medium- en korttermynplanne opgestel word om ons 2023-doelwitte te bereik.

Die organisasie speel deurlopend 'n beduidende rol op verskillende vlakke om die produsent se volhoubaarheid te bevorder. Ek wil u aanmoedig om die verslae van die uitvoerende hoofbestuurder en elke afdelingshoof wat in hierdie verslag vervat is, deur te werk. Daaruit sal u agterkom watter reikwydte, diepte en waarde hierdie organisasie vir ons as graanprodusente bied.

Ek is van mening dat Graan SA in die verslagtydperk sy funksie as waghond vir die graan- en oliesadebedryf behoorlik verrig het. Maatreëls is nagekom om die gehalte van insetmiddele te verseker, om markinligting beskikbaar te stel en te bevorder en om 'n bydrae te lewer om deursigtigheid in die graanmark te verseker. Graan SA het selfs nie geskroom om 'n suksesvolle hofaksie teen die Minister van Landbou, Bosbou en Visserye in te stel, toe rolspelers die aansoek vir die teling- en tegnologieheffing op sojabone probeer stuit het nie.

Die legitimiteit en volhoubaarheid van die oesskattingsproses moet ten alle koste beskerm word. In 'n stadium het die betaling van diensverskaffers deur 'n staatsinstansie agterweë gebly, maar dit is gelukkig ná die bemiddeling van die Nasionale Landboubemarkingsraad opgelos. Graan SA sal voortgaan om 'n wakende oog daaroor te hou dat instrumente soos die nasionale oesskatting in stand gehou word. Graan SA sal ook rolspelers en deelnemers aanmoedig om betrokke te wees om sodoende te verseker dat die inligting vanuit die Oesskattingskomitee so akkuraat moontlik is.

Graan SA se prioriteitsfokusareas wat navorsing betref, is gewasverbetering, gewasbeskerming, biosekuriteit, klimaatsverandering en bewaringslandbou. Goeie vordering is gemaak met die vestiging van verskeie navorsingskonsortiums en die navorsing wat hieruit voortvloei het al beslag gekry. Erkenning word gegee aan verskeie rolspelers uit die openbare en privaat sektor vir hul befondsing en doeltreffende vennootskappe.

Die organisasie bied verskeie platforms om dialoog te bevorder, koppelvlakke te bewerkstellig en erkenning te gee vir prestasie deur produsente. Dit was 'n voorreg om ons lede uit die Wes-Kaap te ontvang by vanjaar se eerste NAMPO Kaap op Bredasdorp. Hierdie hoeksteen wat gelê is, beloof 'n vennootskap wat ongetwyfeld 'n jaarlikse instelling gaan word.

Vir 'n vrywillige produsente-organisasie soos Graan SA is dit noodsaaklik om deurentyd te verseker dat ons bedryfsvoering op optimale vlakke is. Goeie vordering is gedurende die oorsigtydperk met die vaartbelyning van sekere aspekte gemaak. Ons ledelys is met die ondersteuning van Hoofbestuurslede skoongemaak. 'n Markondersoek ten opsigte van die organisasie se inligtingstegnologie en telekommunikasie het gelei tot die oorskakeling na nuwe verskaffers. Fase 1 van die implementering van 'n nuwe geïntegreerde finansiële stelsel is ook suksesvol afgehandel.

Ons ledebemarkingspan, in samewerking met die werwingsagente, het die begrote ledeheffing-teikens behaal en oortref. Dit, tesame met interne besparings en verlaagde spanderings, het meegebring dat 'n tekortbegroting omgekeer kon word in 'n jaareinde wat teen 'n surplus afgesluit is. Goeie korporatiewe beheer en nougesette finansiële kontroles het weer eens gesorg dat Graan SA ongekwalifiseerde oudits op die organisasie se finansiële state asook dié van die Jobs Fund-projek ontvang het.

The competition to represent and fund black grain farmers is intensifying, but whether this is in the interest of unity in agriculture is debatable. Grain SA welcomes any initiative to support our emerging farmers and give them a better start. The organisation has also taken cognisance of the establishment of a new black grain producer association. This development in no way affects Grain SA's sustained commitment and inclusive service to all grain and oilseeds producers. Grain SA's focus will still be to support, develop and assist developing farmers.

Leadership

Good corporate governance is vital to the successful management of the organisation and a new, independent chairperson of the Audit Committee joined the leadership of Grain SA this year. André Hanekom, a former managing director from the food industry who serves on the boards of various companies, took over the reins from Fanie van Zyl, who retired in 2018.

I would like to thank the Executive Committee and the Executive for their inputs and contribution to Grain SA's efficient functioning. Our elected leaders bear the standards in their regions, but often work hand in hand with Jannie de Villiers and his extremely competent staff. Representing the grain producers of our country in various forums inside and outside the agricultural sector requires travelling thousands of kilometres, travelling time – and often a considerable part of this after hours.

On behalf of the members of Grain SA, I would like to convey thanks to the CEO and personnel of Grain SA who serve the grain industry and us as producers through their dedicated work.

The grain industry took its final leave of a few veterans this year. We think with deep regret of the passing of Schalk Pienaar, former chairperson of Agbiz, and Niel Giliomee, chairperson of NAMPO Cape. Vic Mouton, a maize legend and also – among other things – the last chairperson of the Maize Board, also passed away. Our sincere condolences to every producer, farmworker and their relatives who preceded us during the past year.

Prospects

In the past year we in agriculture have already been faced by the uncertainty of expropriation of land without compensation. With a national election in the offing, the chances are slim that there will be no further political squalls for us to weather, while the unfavourable climate and timid grain markets remain a reality.

Profitability and climatic conditions have jeopardized the long-term sustainability of grain production and our constant focus will be to still assist producers with these challenges.

Continue to think strategically and with an eye to the future about your farming operation, and choose partners who can truly add value. May the Lord bless you and keep you in the times ahead.

Die kompetisie om swart graanboere te verteenwoordig en te befonds, is besig om toe te neem in intensiteit, maar of dit in belang van eenheid in landbou is, is debatteerbaar. Graan SA verwelkom enige inisiatief om ons opkomende boere te ondersteun en 'n beter afskop te gee. Die organisasie het ook kennis geneem van die stigting van 'n nuwe swart graanprodusent-vereniging. Dié ontwikkeling beïnvloed in geen mate Graan SA se volgehoue toewyding en inklusiewe bediening van alle graan- en oliesadeprodusente nie. Graan SA se fokus sal steeds wees om ontwikkelende boere te ondersteun, ontwikkel en by te staan.

Leierskap

Goeie korporatiewe bestuur is van deurslaggewende belang in die suksesvolle bestuur van die organisasie en 'n nuwe, onafhanklike voorsitter van die Ouditkomitee het hom dié jaar by die leierskap van Graan SA aangesluit. André Hanekom, 'n voormalige besturende direkteur uit die voedselbedryf wat op die direksie van verskeie maatskappye dien, het die leisels oorgeneem by Fanie van Zyl wat in 2018 uitgetree het.

Ek bedank die lede van die Dagbestuur en Hoofbestuur vir hul insette en bydrae tot Graan SA se doeltreffende funksionering. Ons gekose leiers dra die vaandel in hul streke, maar werk ook dikwels hand aan hand met Jannie de Villiers en sy uiters bekwame personeel. Om die graanprodusente van ons land op verskeie forums binne en buite die landbousektor te verteenwoordig, verg die aflê van duisende kilometers, reistyd – en dikwels heelwat daarvan na-ure.

Namens die lede van Graan SA dra ek ons dank oor aan die Uitvoerende Hoofbestuurder en personeel van Graan SA wat die graanbedryf en ons as produsente deur hulle harde werk dien.

Die graanbedryf het vanjaar 'n paar strydrosse finaal gegroet. Ons dink met leedwese aan Schalk Pienaar, voormalige voorsitter van Agbiz, en Niel Giliomee, voorsitter van NAMPO Kaap, se afsterwe. Vic Mouton, 'n mielielegende en onder andere ook die laaste voorsitter van die Mielieraad, is ook oorlede. Ons opregte meegevoel ook aan elke produsent, plaaswerker en hul naasbestaandes wat in die afgelope jaar ons vooruit gegaan het.

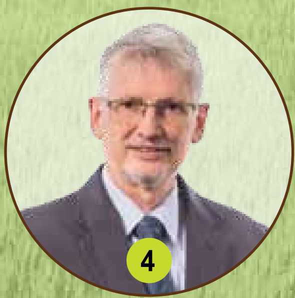
Vooruitsigte

Ons in landbou is in die afgelope jaar reeds gekonfronteer met die onsekerheid van grondonteiening sonder vergoeding. Met 'n nasionale verkiesing wat voorlê, is die kans skraal dat daar nie nog politieke rukwinde gaan wees om te trotseer nie, terwyl die ongunstige klimaat en ingetoë graanmarkte steeds 'n realiteit is.

Winsgewendheid en klimaatstoestande het die langtermyn volhoubaarheid van graanproduksie in gedrang gebring en ons fokus sal steeds wees om produsente met hierdie uitdagings by te staan.

Dink steeds strategies en toekomsgerig oor jou boerdery en kies vennote wat waarlik waarde kan toevoeg. Ek bid vir U die Here se seën en voorsienigheid toe vir die tye wat voorlê.

Jaco Minnaar
CHAIRPERSON
VOORSITTER



1 Jannie de Villiers
CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER

2 Dr Marinda Visser
MANAGER: GRAIN RESEARCH AND POLICY CENTRE
BESTUURDER: GRAANNAVORSING EN BELEIDSENTRUM

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

4 Nico Vermaak
MANAGER: CORPORATE SERVICES
BESTUURDER: KORPORATIEWE DIENSTE

5 Jane McPherson
MANAGER: FARMER DEVELOPMENT
BESTUURDER: LANDBOU-ONTWIKKELING

6 Christa Herbst
MANAGER: FINANCIAL SERVICES
BESTUURDER: FINANSIËLE DIENSTE

7 Susari Teubes
SECRETARY TO THE CEO
SEKRETARESSE VAN DIE HUB

EXPROPRIATION DEBATE DRIVES EMOTIONS TO A HEAD

The reporting period for this annual report – October 2017 to September 2018 – can be described as an extremely intense and emotional year for the grain industry, and for the agricultural sector as a whole. A combination of prices and climate placed a unique set of circumstances on the table for producers.

The weather during the reporting period once again emphasised the great diversity of the climate in our country. This year we had to face beautiful harvests in the east, scorched early maize in the west, and a parched Western Cape.

In 2017 the water crisis in the Western Cape reached alarming proportions. With the pressure on dam levels because of the disastrous drought, uncertainty about how producers would survive the season without water was the highest in years. In the meantime, record harvests in the north of the country were recorded during the period, in the midst of disappointing grain prices.

The political sensible temperature was perhaps the highest we have yet experienced before a national election year in a democratic dispensation in this country. Debates on land reform also awoke deep emotions. After the ANC conference in December 2017 and the resignation of President Jacob Zuma early in 2018, the euphoria of the appointment of Cyril Ramaphosa as president soon lost its lustre with the acceptance of a motion on the expropriation of land without compensation by Parliament.

In the months following our Congress in March, land reform was at the helm of the agenda. It developed as set out in **Table 1** on page 14.

Given Grain SA's focus areas of profitability, people and the environment, the activities of the organisation had to continue as usual and Grain SA had to adjust its strategy and application of resources accordingly. Below is a summary of highlights from the 2017/2018 reporting year:

Strategic focus area: Profitability

EXPROPRIATION WITHOUT COMPENSATION

Because of the resolution on land reform adopted during Congress, it was a given that Grain SA would participate actively in the land debate. We were involved in numerous discussions, think tanks and interactions on the topic – in front of and behind the scenes.

QUALITY OF INPUTS

This year, several Grain SA members were assisted with dispute resolution concerning the quality of seed, agrochemicals, fertiliser, VAT and the diesel rebate. Ensuring the quality of input resources is an ongoing monitoring action. This is done in collaboration with organisations like the Fertiliser Society of Southern Africa (Fertasa), CropLife, the South African Agricultural Machinery Association (SAAMA) and the South African National Seed Organisation (SANSOR).

- With good co-operation by the Department of Agriculture, Forestry and Fisheries, the **fertiliser monitoring project** was launched once again. All the fertiliser companies who participated were subsequently visited and the results were discussed with them.

ONTEIENING DRYF EMOSIES OP DIE SPITS

Die verslagtydperk van hierdie jaarverslag – Oktober 2017 tot September 2018 – kan beskryf word as 'n uiters intense en emosionele jaar vir die graanbedryf – en vir die landbousektor in geheel. 'n Kombinasie van pryse en klimaat het 'n unieke stel omstandighede vir produsente tafel toe gebring.

Weerstoestande wat in die verslagtydperk geheers het, het weer eens die groot diversiteit van ons land se klimaat beklemtoon. Van mooi oeste in die ooste, na verbrande vroeë mielies in die weste tot 'n verdorde Wes-Kaap, is waarmee ons in dié jaar gekonfronteer is.

In 2017 het die waterkrisis in die Wes-Kaap ernstige afmetings aangeneem. Met die druk op damvlakke weens 'n droogteramp, was daar lanklaas soveel onsekerheid oor hoe produsente die seisoen gaan deurleef sonder water. Intussen is rekordoeste in die noorde van die land in die tydperk aangeteken te midde van teleurstellende graanpryse.

Die politieke aanvoelbaarheidstemperatuur was moontlik die felste wat ons nog in 'n demokratiese bestel in hierdie land voor 'n nasionale verkiesingsjaar ervaar het. Debatte oor grondhervorming het ook diep emosies opgewek. Sedert die ANC-konferensie in Desember 2017 en die bedanking van president Jacob Zuma vroeg in 2018, het die euforie van die aanstelling van Cyril Ramaphosa as president spoedig sy glans verloor ná die Parlement se daaropvolgende aanvaarding van 'n mosie rakende onteiening van grond sonder vergoeding.

Die maande wat op ons Kongres in Maart gevolg het, was 'n tyd waarin grondhervorming bo-aan die sakelys was. Dit het verloop soos uiteengesit in **Tabel 1** op bladsy 14.

Gegewe die organisasie se fokusareas van winsgewendheid, mense en omgewing, moes die werksaamhede van die organisasie egter normaal voortgaan en Graan SA moes sy strategie en toewysing van hulpbronne hiervolgens aanpas. Hier volg 'n samevatting van hoogtepunte uit die 2017/2018-verslagjaar:

Strategiese fokusarea: Winsgewendheid

ONTEIENING SONDER VERGOEDING

Dat Graan SA daadwerklik aan die gronddebat moes deelneem, was 'n gegewe na aanleiding van die besluit oor grondhervorming wat tydens Kongres geneem is. Ons is betrek in vele gesprekke, dinkskrums en interaksies oor die onderwerp, voor en agter die skerms.

KWALITEIT VAN INSETTE

Verskeie Graan SA-lede is vanjaar bygestaan met geskilbeslegting oor die gehalte van saad, landbouchemikalieë, kunsmis, BTW en die dieselkorting. Die versekering rakende die kwaliteit van insetmiddele is 'n deurlopende moniteringsaksie. Dit word in samewerking met organisasies soos die Misstofvereniging van Suider-Afrika (Fertasa), CropLife, Suid-Afrikaanse Landboumasjinerie-assosiasie (SALMA) en die Suid-Afrikaanse Nasionale Saadorganisasie (SANSOR) uitgevoer.

- Met goeie samewerking deur die Departement van Landbou, Bosbou en Visserye, is die **kunsmismoniteringprojek** weer van stapel gestuur. Al die kunsmismaatskappye wat deelgeneem het, is agterna besoek en die resultate is met hulle bespreek.

1 Grain SA's participation in the land debate
Graan SA se deelname aan die gronddebat

07/03/2018 - 08/03/2018	Grain SA Congress adopts motion on land reform and commits itself to in-depth discussions with the ruling party to obtain consensus on all aspects of expropriation without compensation	Graan SA Kongres aanvaar mosie oor grondhervorming en verbind hom daartoe om indringende gesprek met die regerende party te voer om konsensus oor alle aspekte van onteiening sonder vergoeding te kry
27/03/2018 - 28/03/2018	In Transformation Initiative (ITI) dialogue on possible changes to Section 25 of the Constitution	In Transformation Initiative (ITI)-dialoog oor moontlike verandering van Artikel 25 van die Grondwet
10/05/2018	ITI follow-up workshop	ITI-opvolgwerkswinkel
15/05/2018 - 18/05/2018	Nation in Conversation discussion forum at NAMPO Harvest Day dedicated largely to the land debate	Nasie in Gesprek-gespreksplatform by NAMPO Oesdag grootliks aan die gronddebat gewy
15/06/2018	Grain SA's submission to Parliamentary Revision Committee on Section 25	Graan SA se voorlegging ingedien by Parlementêre Hersienings-komitee oor Artikel 25
28/07/2018	Grain SA's states its case during the public hearing on expropriation without compensation in Pretoria	Graan SA stel sy standpunt tydens die onteiening sonder vergoeding openbare verhoor in Pretoria
14/08/2018	Grain SA, Agri SA and Agbiz discuss a five-year plan for agriculture similar to that of the motor vehicle industry with Minister Nkosazana Dlamini-Zuma	Graan SA, Agri SA en Agbiz voer gesprek met minister Nkosazana Dlamini-Zuma oor 'n vyfjaarplan vir landbou soortgelyk aan dié van die motorbedryf
21/08/2018	Meeting with Deputy President David Mabuza, chairperson of the inter-ministerial committee on land reform	Vergadering met adjunkpresident David Mabuza, voorsitter van die inter-ministeriële komitee oor grondhervorming
23/08/2018 - 24/08/2018	Grain SA plays a key role in organising the Bela-Bela Land Summit – which was also attended by Deputy President David Mabuza	Graan SA speel 'n sleutelrol in die organisering van die Bela-Bela Grond-beraad – wat ook deur adjunkpresident David Mabuza bygewoon is
24/08/2018	Meeting with President Cyril Ramaphosa to submit proposals on what the agricultural sector needs to grow	Vergadering met president Cyril Ramaphosa om voorstelle te maak oor wat die landbousektor benodig om te groei
27/08/2018	Members of the Agri-Sector Unity Forum (ASUF) sign a consensus document on land reform	Lede van die Eenheidsforum vir Landbou (ASUF) onderteken 'n kon-sensusdokument oor grondhervorming
28/08/2018 - 29/08/2018	Agri SA arranges a diplomatic gathering with various ambassadors and diplomatic staff from 13 countries to explain concerns about land reform. Grain SA also makes a presentation	Agri SA reël 'n diplomatieke byeenkoms met verskeie ambassadeurs en diplomatieke personeel uit 13 lande om kommer oor grondher-vorming te verduidelik. Graan SA lewer ook 'n voorlegging
04/09/2018	Grain SA submission to the Parliamentary Working Group	Graan SA-voorlegging aan die Parlementêre Werkgroep
07/09/2018	Senior ANC members request a meeting with an Agri SA delegation of 200+ people in Pretoria (including a delegation of Grain SA repre-sentatives) as part of a positive interaction between the government and organised agriculture	Senior ANC-lede vra 'n vergadering aan met 'n Agri SA-afvaardiging van 200+ mense in Pretoria (waaronder 'n afvaardiging van Graan SA-verteenwoordigers) as deel van positiewe interaksie tussen die regering en georganiseerde landbou
10/09/2018	Preparation of agricultural plan in collaboration with Agbiz	Voorbereiding van landbouplan saam met Agbiz
12/09/2018	Nation in Conversation debate during NAMPO Cape focuses on land reform	Nasie in Gesprek-debat tydens NAMPO Kaap fokus op grondher-vorming
17/09/2018	Agbiz planning session on agricultural plan takes place	Agbiz-beplanningsessie oor landbouplan vind plaas
18/09/2018	First meeting of President Ramaphosa's land reform panel on which an agricultural leader and a commercial producer serve	Eerste vergadering van president Ramaphosa se grondhervorming-paneel waarop 'n landbouleier en 'n kommersiële produsent dien
21/09/2018	Follow-up meeting at the Presidency with the grouping that is to com-pile the Agricultural Sector Plan (of which Grain SA is a member)	Opvolgvergadering te Presidensie met die groepering wat die Land-bousektorplan opstel (waarvan Graan SA deel vorm)
12/10/2018	The Motsepe Foundation arranges a gathering of 200 traditional leaders, the CEOs of the four commercial banks, the Land Bank and organised agriculture in order to get communal land into produc-tion. Grain SA made a presentation	Die Motsepe-stigting het 'n byeenkoms van 200 tradisionele leiers, die HUB's van die vier kommersiële banke, die Land Bank en georgani-seerde landbou aangebied, met die doel om kommunale grond in produksie te kry. Graan SA het 'n voorlegging gemaak

- An application was submitted to the state to abolish the **20% import tariff** on certain **tractor tyres**.
- Grain SA managed to have the **10% import tariff** on **canola seed** scrapped. From 2019 canola seed for planting purposes will therefore be imported without a tariff.
- In September 2018 final comments were submitted on the Treasury's proposed **diesel rebate system** after the matter had been discussed in detail during industry workshops with the Treasury and the South African Revenue Services (SARS).

ACTUAL INCOME AND PRODUCTION COSTS

Data and information were gathered to determine the actual income and production costs of the **main maize production areas** for the 2016/2017 production season. The historical real income and production cost figures are established and collected to obtain an idea of actual cost per input item and the profitability of a crop. The budgeted income and production cost figures for maize (2018/2019 production season) were compiled.

- 'n Aansoek is by die staat ingedien vir die afskaffing van die **20%-invoertarief** op sekere **trekkerbande**.
- Graan SA kon daarin slaag om die **10%-invoertarief** op **kanolasaad** afgeskaf te kry. Kanolasaad vir aanplantingsdoeleindes word dus vanaf 2019 sonder 'n tarief die land ingevoer.
- Finale kommentaar is in September 2018 gelewer op die Tesourie se voorgestelde **dieselrabatstelsel**, na dit breedvoerig tydens bedryfswerkswinkels met Tesourie en die Suid-Afrikaanse Inkomste-diens (SAID) bespreek is.

WERKLIKE INKOMSTE EN PRODUKSIEKOSTE

Data en inligting is ingesamel en verkry om die werklike inkomste en produksiekoste van die **belangrikste mielieproduksiegebiede** vir die 2016/2017-produksieseisoen te bepaal. Die historiese werklike in-komste en produksiekostesyfers word bepaal en ingesamel, aangesien dit 'n idee gee van werklike koste per insetitem en die winsgewend-heid van 'n gewas. 'n Begrote inkomste- en produksiekostesyfers vir mielies (2018/2019-produksieseisoen) is opgestel.

BREEDING AND TECHNOLOGY LEVY

The Minister of Agriculture, Forestry and Fisheries approved a **statutory levy on soybeans**. This means that seed companies can be compensated for their performance in the soybean seed market. Grain SA views the implementation of the soybean breeding and technology levy as a breakthrough. It provides producers with access to the newest cultivars and technology to allow them to compete with other countries on an equal footing.

The levy on soybeans was approved for two years, effective from 1 March 2019. In September 2018 the breeding and technology levy for wheat and barley was also renewed for a further two years and oats was included.

SOYBEAN LOCATION DIFFERENTIAL

Requests for the implementation of a **soybean location differential** was submitted to the JSE by role-players. Grain SA participated in a debate on this during a JSE advisory committee workshop. After little support was received for the implementation of a location differential on soybeans, the JSE recommended that it not be implemented.

INSIDER TRADING

Grain SA presented a work session for the Financial Services Board (FSB) and several complaints on **insider trading** in the grain market and the **dissemination of false or misleading information** were pointed out. One of the major multinational grain traders was found guilty of market manipulation during the past year. This grain trader announced with great fanfare during the drought year that they were importing thousands of tons of white maize from Mexico, and they had already sold this here in South Africa. A total of four other cases involving maize and wheat were also investigated by the Financial Sector Conduct Authority (FSCA). This delivers a clear message to everyone participating in the market to remain honest.

AB INBEV BARLEY CONTRACT

A complaint was submitted at the Competition Commission about AB InBev's **possible violation of merger conditions** with SAB in that producers were offered less for their barley. The case was investigated by the Competition Commission, but the verdict was not in favour of Grain SA.

NATIONAL CROP INSURANCE SCHEME

Discussions were held with the **SA Insurance Association (SAIA)**, and later in the year also with the World Bank, in an effort to establish a state-supported national crop insurance scheme. There is no news to report yet, but the matter is still receiving attention.

GRADING OF WHEAT

After almost two years of consultation and several investigations, the Wheat Forum **finally reached consensus** about the **grading** of wheat. An integral part of the debate on grading was the price differences between the various grades. The Wheat Forum Steering Committee furthermore indicated that the Forum would submit an application to the Southern African Customs Union (SACU) to have the wheat rebate for the Botswana, Lesotho, Namibia and Swaziland (BLNS) countries removed. The rebate on foreign wheat of origin will be added to the JSE once more.

EU DUTY-FREE QUOTA

The issue of the **300 000 ton duty-free quota** for wheat for which the European Union (EU) qualifies was taken up with the Department of Trade and Industry and the EU council member concerned. At present only a few individuals and companies benefit from this quota, while the state is slow to adjust the conditions to allow more participants access and enable the market to pass lower prices on to consumers.

TELING- EN TEGNOLOGIEHEFFING

Die Minister van Landbou, Bosbou en Visserye het 'n **statutêre heffing op sojabone** goedgekeur. Hiervolgens kan saadmaatskappye vergoed word vir hul prestasie in die sojaboonsaadmark. Graan SA sien die inwerkingtreding van dié sojaboon teling- en tegnologieheffing as 'n deurbraak. Dit verskaf aan produsente toegang tot die nuutste kultivars en tegnologie om op gelyke voet met ander lande te kan meeding.

Die heffing op sojabone is vir twee jaar goedgekeur, met ingang van 1 Maart 2019. In September 2018 is die teling- en tegnologieheffing vir koring en gars vir nog twee jaar hernu en hawer is ook hierby ingesluit.

SOJABOON-LIGGINGSDIFFERENSIAAL

Versoeke vir die implementering van 'n **sojaboon-liggingsdifferensiaal** is deur rolspelers by die JSE ingedien. Graan SA het tydens 'n JSE-advieskomiteewerkswinkel aan 'n debat hieroor deelgeneem. Ná weinig ondersteuning vir die implementering van 'n liggingsdifferensiaal op sojabone, het die JSE aanbeveel dat dit nie geïmplementeer word nie.

BINNEHANDEL

Graan SA het 'n werksessie vir die Finansiële Diensteraad (FSB) aangebied wat verskeie klagtes oor **binnehandel in die graanmark** en die **verspreiding van valse of misleidende inligting** uitwys. Een van die groot multinasionale graanhandelaars is die afgelope jaar skuldig bevind aan markmanipulasie. Dié graanhandelaars het tydens die droogtejaar met groot fanfare aan almal verkondig dat hulle besig was om duisende tonne witmielies van Mexiko af in te voer – wat hulle alreeds hier in Suid-Afrika verkoop het. 'n Totaal van vier ander sake oor mielies en koring word ook deur die Financial Sector Conduct Authority (FSCA) ondersoek. Dit alleen is 'n duidelike boodskap aan almal wat in die mark deelneem, om eerlik te bly.

AB INBEV-GARSKONTRAK

'n Klagte is by die Mededingingskommissie ingedien oor AB InBev se **moontlike oortreding van samesmeltingvoorwaardes** met SAB, deurdat produsente minder aangebied is vir hul gars. Die saak is deur die Mededingingskommissie ondersoek, maar uitspraak is teen Graan SA gelewer.

NASIONALE OESVERSEKERINGSKEMA

Gesprek is gevoer met die **SA Versekeringsinstituut (SAIA)** en later in die jaar ook met die Wêreldbank in 'n poging om 'n staatsondersteunde nasionale oesversekeringskema gevestig te kry. Daar is tans nog nie nuus om te rapporteer nie, maar die saak word steeds gedryf.

KORINGGRADERING

Na bykans twee jaar van samesprekings en verskeie ondersoeke, het die Koringforum **finaal konsensus bereik** oor die **gradering** van koring. 'n Integrale deel van die debat oor die gradering, was die prysverskille tussen die onderskeie grade. Die Koringforum Stuurkomitee het verder aangedui dat die Forum 'n aansoek gaan indien om die Southern African Customs Union (SACU)-koringkorting vir die Botswana, Lesotho, Namibië en Swaziland (BLNS)-lande te verwyder. Die korting op buitelandse koring van oorsprong gaan weer by die JSE gevoeg word.

EU DOEANEVRYE KWOTA

Die **300 000 ton doeanevrye kwota** vir koring waarvoor die Europese unie (EU) kwalifiseer, is met die Departement van Handel en Nywerheid en die betrokke EU-raadslid opgeneem. Dié kwota bevoordeel tans net enkele individue en maatskappye, terwyl die staat traag is om die voorwaardes aan te pas ten einde meer deelnemers toe te laat en die mark in staat te stel om laer pryse aan verbruikers deur te gee.

DEVELOPMENT OF OVERSEAS MARKETS

As part of the initiative to create new export markets for locally produced grains, the Grain SA team has made an active effort to remove the obstacles in this regard as soon as possible. The maize **export market to Iran** was **successfully opened** this year, and good progress is being made with the establishment of export opportunities for maize and soybeans to China.

INTENTIONS OF IMPORTS AND EXPORTS

The free market can only function optimally if all the role-players in the market have access to the same information. Grain SA submitted an application for trade intentions (imports and exports) also to be reported by the South African Grain Information Service (SAGIS). The Minister of Agriculture, Forestry and Fisheries approved this statutory measure in May this year, and the first information in this regard was reported by SAGIS for the first time at the end of June. These **figures reflect the imports and exports** planned for the eight weeks after the date for the most recent physical exports has been reported, and contributes to **transparency in the local market**.

MARKET INFORMATION

Grain SA annually allocates generous capacity for collecting and disseminating market information so that producers can make **informed marketing decisions**. The information provided comes in various formats, for example ad hoc reports, market reports, magazine articles, videos or presentations to groups at farmers's days and other information events.

Strategic focus area: People

FARMER DEVELOPMENT PROGRAMME

The programme has about 9 500 black farmers with access to arable land as members. These farmers are divided into different categories, namely subsistence farmers, smallholder farmers, potential commercial producers, and new era farmers. Grain SA's programme focuses equally on people development and on agricultural production practices. Obtaining annual funding remains a challenge, but with the financial support of grain trusts, government departments and a network of input providers the programme continues to grow.

The **Jobs Fund** project is a four-year project which was started three seasons ago in partnership with the National Treasury and several input providers. The 2017/2018 **season ended positively**, although not as well as the previous one. Funding for 8 000 ha was donated by the Jobs Fund for the 2018/2019 season. Grain SA's application for the 2019/2020 to 2022 cycle is progressing well.

At the 2018 **AgriSETA awards** our **Farmer Development Programme** was named the best developing commodity organisation and received an award for the best corporate governance of a development project. Well done to the Farmer Development team!

FINANCING FOR BLACK FARMERS

We have concluded a contract with **AB InBev** to finance 38 farmers on 1 738 ha. **Absa**, in turn, approved production credit for four farmers. Discussions were also held with the chairperson of the Industrial Development Corporation (IDC) about the possibility of production financing for black commercial farmers in the future. Progress in this regard is slow, but at least it is showing progress.

PUBLIC PLATFORMS

Grain SA is positioned strategically to create opportunities inside and outside the grain industry to reinforce the image of agriculture, promote broad dialogue, shine the spotlight on the most recent farming technology and trends, and contribute to the establishment and development of personal or trade networks. In addition, these platforms create the

ONTWIKKELING VAN OORSESE MARKTE

As deel van die inisiatief om nuwe uitvoermarkte vir plaaslik-geproduseerde grane te skep, het die Graan SA-span skouer aan die wiel gesit om die struikelblokke hieromtrent spoedig te verwyder. Die mielie-**uitvoermark na Iran** is dié jaar **suksesvol geopen** en goeie vordering word gemaak om uitvoergeleenthede na China vir mielies en sojabone te bewerkstellig.

INTENSIES VAN IN- EN UITVOERE

Die vryemark kan slegs optimaal funksioneer indien al die rolspelers in die mark toegang tot dieselfde inligting het. Graan SA het 'n aansoek ingedien dat die intensies van handel (invoere en uitvoere) ook deur die Suid-Afrikaanse Graaninligtingsdiens (SAGIS) gerapporteer word. Die Minister van Landbou, Bosbou en Visserye het hierdie statutêre maatreël gedurende Mei vanjaar goedgekeur en die eerste inligting in hierdie verband is einde Junie vir die eerste keer deur SAGIS gerapporteer. Hierdie **syfers toon die invoere en uitvoere** wat vir die agt weke nadat die datum vir die nuutste fisiese uitvoere gerapporteer is, beplan word en dra by tot **deursigtigheid in die plaaslike mark**.

MARKINLIGTING

Graan SA allokeer jaarliks ruim kapasiteit om markinligting te versamel en te versprei sodat produsente **ingeligte bemarkingsbesluite** kan maak. Die inligting wat beskikbaar gestel word, neem verskeie formate aan, byvoorbeeld ad hoc-verslae, markverslae, tydskrifartikels, video's of die toespreek van groepe by boeredae en ander inligtingsgeleenthede.

Strategiese fokusarea: Mense

LANDBOU-ONTWIKKELINGSPROGRAM

Die program het ongeveer 9 500 swart boere as lede wat almal toegang tot bewerkbare grond het. Hierdie boere word in verskillende kategorieë verdeel, naamlik bestaansboere, kleinskaalse boere, potensiële kommersiële boere en nuwe era-boere. Graan SA se program fokus ewe sterk op mense se ontwikkeling as op landbouproduksiepraktyke. Om jaarlikse befondsing te bekom, bly 'n uitdaging, maar met die finansiële steun van die graantrusts, regeringsdepartemente en 'n netwerk van insetverskaffers gaan die program steeds van krag tot krag.

Die **Jobs Fund**-projek is 'n vierjaar-projek wat drie seisoene gelede aangepak is in vennootskap met die Nasionale Tesourie en verskeie insetverskaffers. Die 2017/2018-**seisoen het positief afgeloop**, hoewel nie so goed soos die vorige een nie. Vir die 2018/2019-seisoen is befondsing vir 8 000 ha deur die Jobs Fund bewillig. Graan SA se aansoek vir die 2019/2020 tot 2022-siklus vorder goed.

Tydens die 2018 **AgriSETA-toekennings** is ons **Landbou-ontwikkelingsprogram** aangewys as die beste ontwikkelende kommoditeitsorganisasie en vir die beste korporatiewe beheer van 'n ontwikkelingsprojek. Knap gedaan aan die Landbou-ontwikkelingspan!

FINANSIERING VIR SWART BOERE

Ons het 'n kontrak met **AB InBev** gesluit om 38 boere op 1 738 ha te finansier. Op sy beurt het **Absa** produksiekrediet vir vier boere goedgekeur. Gesprek is ook gevoer met die voorsitter van die Nywerheidsontwikkelingskorporasie (IDC) oor die moontlikheid van produksiefinansiering vir swart kommersiële boere in die toekoms. Die vordering hiermee is stadig, maar ten minste toon dit al vordering.

OPENBARE PLATFORMS

Graan SA is strategies geposisioneer om binne en buite die graanbedryf geleenthede te skep wat die beeld van landbou versterk, breë dialoog bevorder, die jongste boerderytegnologie en -tendense in die kollig plaas en 'n bydrae lewer om persoonlike of handelsnetwerke te vestig en uit te bou. Bowenal skep hierdie platforms die ruimte waar-

space within which the agricultural family and the broad public can experience the sector with contemporary farm hospitality.

- A new record attendance figure was achieved during **NAMPO Harvest Day** in 2018, with more than 82 817 visitors. A study done among exhibitors by the marketing team received extremely positive feedback, and the biggest compliment was about the professional management of the Harvest Day. Foreign exhibitors' interest in NAMPO as a platform for reaching the rest of Africa continues.
- A partnership with the Bredasdorp Park NPC paved the way for **NAMPO Cape**, which was presented for the first time. This regional show received excellent support from the community of Bredasdorp and the surrounding area and was attended by 16 245 visitors. Planning for next year's NAMPO Cape has already started.
- The successes of grain producers were celebrated at two prestige events, namely the **Day of Celebration** and the Grain Producer of the Year function. Subsistence, smallholder, potential commercial and new era farmers are honoured for their contribution to food security during the Day of Celebration. The **Grain Producer of the Year** awards provide recognition to the grain producers who farm with excellence.
- The **Nation in Conversation** platform creates an opportunity for public discourse on all facets of agriculture. Grain SA is a partner in this and through the NAMPO Harvest Day and NAMPO Cape this year helped to present the dialogue again.
- Our ***SA Graan/Grain* magazine** is still performing well, despite the fact that a number of other publications are experiencing difficulties in the current economic conditions. The editorial team of this grain journal and mouthpiece of Grain SA had a planning session to ensure its status as the leading agricultural magazine and reinforce its digital strategy.

GRAIN ACADEMY

The graduation ceremony for the 2017 group of Grain Academy graduates was held at the **University of the Free State** in July this year. The programme, which is an initiative of Grain SA in partnership with Syngenta, is a concrete investment in the agricultural leaders of the future. The Grain Academy was presented in the **Western Cape** for the first time in 2018.

REITZ HIGH SCHOOL

Through funding by the Sasol Trust, the Reitz High School is currently implementing **a precision farming agriculture curriculum**. Grain SA's representative on the Sasol Trust is a member of the steering committee to get the project off the ground.

Strategic focus area: Environment

RESEARCH CONSORTIUMS

The aim of the various consortiums is to use innovation to improve the productivity, profitability and sustainability of grain and oilseeds producers and benefit the industry and wider community.

- In October this year the wheat breeding platform introduced a pre-breeding programme at the **Stellenbosch University**. The Minister of Science and Technology attended the inauguration of this new era in wheat breeding and the promotion of the development of more sustainable wheat cultivars.
- The Department of Science and Technology (DST) invited Grain SA to exhibit all the research projects conducted in collaboration with them at the **BIO Africa Convention**.
- The 2018/2019 season will be the first in which **Sclerotinia trials** will be planted since the Sclerotinia research network was established.
- An early-warning system for **army worms** in SA was initiated by Grain SA and was employed effectively this year.

binne die landboufamilie en die breë publiek die sektor met eietydse plaasgasvryheid kan ervaar.

- 'n Nuwe rekordbywoningsyfer is tydens die **NAMPO Oesdag** in 2018 aangeteken met meer as 82 817 besoekers. 'n Studie onder uitstallers deur die bemarkingspan spreek van groot positiwiteit en die grootste kompliment was die professionele bestuur van die Oesdag. Buitelandse uitstallers se belangstelling in NAMPO om sodoende die res van Afrika te bereik, duur voort.
- 'n Vennootskap met die Bredasdorp Park NPC het die weg gebaan vir **NAMPO Kaap** wat vir die eerste keer aangebied is. Dié streekskou is uitstekend deur die gemeenskap van Bredasdorp en omgewing ondersteun en 16 245 besoekers het dit bygewoon. Die beplanning vir aanstaande jaar se NAMPO Kaap is reeds aan die gang.
- Die suksesse van graanprodusente is tydens twee prestigegeleenthede gevier, naamlik die **Feesdag** en die Graanprodusent van die Jaar-funksie. Bestaans-, kleinskaalse, potensiële kommersiële en nuwe era-boere word tydens die Feesdag vir hul bydrae tot voedselsekerheid vereer. Die **Graanprodusent van die Jaar**-toekennings verleen erkenning aan die graanprodusente wat met uitnemendheid boer.
- Die **Nasie in Gesprek**-platform skep die geleentheid vir openbare diskoers oor landbou in al sy fasette. Graan SA is 'n vennoot hiervan en het vanjaar deur die NAMPO Oesdag en NAMPO Kaap meegewerk dat die dialoog weer kan plaasvind.
- Ons ***SA Graan/Grain*-tydskrif** presteer steeds goed, ten spyte van heelwat ander publikasies wat swaar trek in die huidige ekonomiese toestande. Dié graanvaktydskrif en mondstuk van Graan SA se redaksiespan het 'n beplanningsessie gehad om sy status as leidende landboutydskrif te verseker en die digitale strategie te versterk.

GRAANAKADEMIE

Die gradeplegtigheid vir die 2017-groep van die Graanakademie is in Julie vanjaar by die **Universiteit van die Vrystaat** aangebied. Die program, wat 'n inisiatief van Graan SA in vennootskap met Syngenta is, is 'n konkrete belegging in die landbouleiers van die toekoms. Die Graanakademie is in 2018 vir die eerste keer in die **Wes-Kaap** aangebied.

HOËRSKOOL REITZ

Deur middel van befondsing deur die Sasol Trust, is Hoërskool Reitz tans in die proses om **'n presisieboerdery-landbouleerplan** te implementeer. Graan SA se verteenwoordiger op die Sasol Trust vorm deel van die stuurkomitee om die projek van die grond te kry.

Strategiese fokusarea: Omgewing

NAVORSINGSKONSORTIUMS

Die onderskeie konsortiums se oogmerk is om innovering te gebruik om die produktiwiteit, winsgewendheid en volhoubaarheid van graan- en oliesadeprodusente te verbeter en die bedryf en wyer gemeenskap tot voordeel te strek.

- Die koringtelingsplatform het in Oktober vanjaar 'n voortelingsprogram by die **Universiteit Stellenbosch** bekend gestel. Die Minister van Wetenskap en Tegnologie het die inwyding van dié nuwe era van koringteling – en die bevordering van die ontwikkeling van meer volhoubare koringkultivars – bygewoon.
- Die Departement van Wetenskap en Tegnologie (DWT) het Graan SA genooi om tydens die **BIO Afrika-konvensie** al die navorsingsprojekte wat in samewerking met hulle gedoen word, uit te stal.
- Sedert die stigting van die Sclerotinia-navorsingsnetwerk sal die 2018/2019-seisoen die eerste wees waarin **Sclerotinia-proewe** aangeplant word.
- 'n Vroeëwaarskuwingstelsel vir **kommandowurms** in SA is deur Graan SA geïnisieer en is vanjaar effektief aangewend.

- The **Climate Change Consortium** is currently using new maize germ plasma to increase the heat and drought tolerance of South African cultivars. A new project for predicting climate risks for maize production areas is being introduced.
- An agreement was concluded with the **University of Pretoria** to carry out joint research in an **African research centre**. This is a significant step towards the future of research in the grain industry and constitutes an integral part of our network of research platforms.
- Grain SA's **research contract** with the **DST** was renewed this year.

CONSERVATION AGRICULTURE

Grain SA's **Farmer Innovation Programme** for Conservation Agriculture completed its fifth season and good momentum has already been developed in the sixth season. A start was made this year with investigating concerns about excessively high soil degradation rates, profitability and poverty in grain-producing areas. Awareness of conservation agriculture is actively promoted. These efforts include involvement in CA conferences at Reitz and Ottosdal, the National Land Care Conference, the Africa Conservation Agriculture Conference, various farmer days, magazine articles, and the development of a video series, *Shepherds of the Soil*.

INTERACTION WITH MEMBERS

Our members were serviced at various levels over the past year. In addition to Congress in March, 37 information meetings were convened at regional level, as were five other producer information days and several presentations at meetings, congresses, Nation in Conversation and regional shows.

COMMODITY MATTERS: GRAIN SA

- In spite of challenging economic conditions, Grain SA managed to reverse a budgeted deficit of R3,9 million to a surplus of roughly R2,1 million. The **positive result** is attributed to a combination of additional income that was not budgeted for, and cost savings. The marketing team's good performance with the collection of levy funds contributed to this. I have to acknowledge the strong support by our partners for the projects and services in those divisions that handle our core business.
- Grain SA takes moderate risks as far as investments are concerned. Because of the cooling down of markets and the major **pressure on the exchange rate**, our investments did not perform as expected.
- **An unqualified audit report** was issued by PricewaterhouseCoopers for the Grain SA Group and Farmer Development's Jobs Fund Project. Procedures and measures are followed in order to keep our finances sound with good corporate governance.
- The complete changeover to the **NAV system** posed special challenges to our financial team, but they accepted the responsibility and the implementation was completed successfully. The new functionalities, access to management information and handling of the central database are a few of the benefits offered by the new system.
- Grain SA benchmarked the quality and costs of all IT-related service providers to ensure that the most cost-effective and appropriate solutions are used at all levels. The **IT support and infrastructure services** were transferred to Hambisana in March 2018. In addition to the normal operating requirements, the suppliers passed the NAMPO 2018 baptism of fire with flying colours.
- **A skills development plan** was submitted to the AgriSETA by Grain SA. The development and empowerment of all staff are addressed with various training opportunities and courses. During the year under review, some of the staff were exposed to an international congress on genome modification in Paris, France. The International Grains Council meeting was attended in London, and we were invited to attend the Argentinian version of the NAMPO Harvest Day, the Expoagro.

- Die **Klimaatveranderingskonsortium** gebruik tans nuwe mieliekiemplasma om die hitte- en droogteverdraagsaamheid van Suid-Afrikaanse kultivars te verhoog. 'n Nuwe projek om klimaatsrisiko's vir mielieproduksiegebiede te voorspel, word tans bekend gestel.
- 'n Ooreenkoms is met die **Universiteit van Pretoria** gesluit met die in-tensie om gesamentlike navorsing in 'n **Afrika-navorsingsentrum** uit te voer. Dit is 'n betekenisvolle tree na die toekoms van navorsing in die graanbedryf en vorm 'n integrale deel van ons netwerk van navorsingsplatforms.
- Graan SA se **navorsingskontrak** met die **DWT** is vanjaar hernu.

BEWARINGSLANDBOU

Graan SA se **Boere-innoveringsprogram** vir Bewaringslandbou het sy vyfde seisoen agter die blad en goeie momentum is reeds in die sesde seisoen opgebou. Daar is vanjaar begin om bekommernisse oor buitensporige hoë gronddegradasiekoerse, winsgewendheid en armoede in graanproduserende gebiede te ondersoek. Bewusmaking van bewaringslandbou word aktief voortgesit. Hieronder tel ons betrokkenheid by BL-konferensies op Reitz en Ottosdal, die nasionale Land Care-konferensie, die Afrika-bewaringslandboukonferensie, verskeie boeredae, tydskrifartikels en die ontwikkeling van 'n reeks video's, *Shepherds of the Soil*.

INTERAKSIE MET LEDE

Ons lede is in die afgelope jaar op verskeie vlakke gediens. Benewens die Kongres in Maartmaand, is 37 inligtingsvergaderings op streekvlak aangebied asook vyf ander produsent-inligtingsdae en verskeie optredes by vergaderings, kongresse, Nasie in Gesprek en streekskoue.

BEDRYFSAKE: GRAAN SA

- Ten spyte van uitdagende ekonomiese toestande, kon Graan SA daarin slaag om 'n begrote tekort van R3,9 miljoen om te keer na 'n surplus van nagenoeg R2,1 miljoen. Die **positiewe resultaat** word toegeskryf aan 'n kombinasie van addisionele inkomste waarvoor nie begroot is nie en kostebesparings. Die bemarkingspan se goeie prestasie met die invordering van heffingsfondse het 'n bydrae gelewer. Ek kan nie nalaat om erkenning te gee aan die sterk ondersteuning deur ons vennote tot die projekte en dienste in dié afdelings wat ons kernbesigheid hanteer nie.
- Graan SA neem gematigde risiko's wat beleggings betref. Ons beleggings het weens die afkoeling in die markte en die kwaai **wisselkoersdruk** nie presteer soos wat ons voorsien het nie.
- **'n Ongekwalifiseerde ouditverslag** is vir die Graan SA Groep en Landbou-ontwikkeling se Jobs Fund-projek deur Pricewaterhouse-Coopers uitgereik. Prosedures en maatreëls word nagekom ten einde ons finansies met goeie korporatiewe beheer kerngesond te hou.
- Die volledige oorskakeling na die **NAV-stelsel** het besondere uitdagings aan ons finansiële span gestel, maar hulle het die verantwoordelikheid opgeneem en die implementering suksesvol afgehandel. Die nuwe funksionaliteite, toegang tot bestuursinligting en sentrale databasis-hantering is maar enkele voordele wat die nuwe stelsel bied.
- Graan SA het die gehalte en koste van alle IT-verwante diensverskaffers ondersoek om te verseker dat die kostedoeltreffendste en toepaslikste oplossings op alle vlakke gebruik word. Die **IT-ondersteuning en infrastruktuurdienste** is in Maart 2018 aan Hambisana oorgedra. Benewens die normale bedryfvoeringsvereistes het die verskaffer NAMPO 2018 as vuurdoop met vlieënde vaandels geslaag.
- **'n Vaardigheidsontwikkelingsplan** is deur Graan SA by die Agri-SETA ingedien. Die ontwikkeling en bemagtiging van alle personeel word aangespreek met verskillende opleidingsgeleenthede en kursusse. Van die personeel het in die jaar onder oorsig blootstelling gekry aan 'n internasionale kongres oor genoommodifikasie in Parys, Frankryk. Die Internasionale Graanraad-vergadering is in Londen bygewoon en die Argentynse weergawe van die NAMPO Oesdag, die Expoagro, is op uitnodiging besoek.

COMMUNICATION AND PUBLIC RELATIONS

Grain SA's communication and public relations strategy focuses on sharing information and creating awareness on grain production among important internal and external stakeholders. The following actions deserve to be mentioned:

- The upgrading of **Grain SA's website** was completed.
- An exclusive **digital membership card** via the **JOYN app** was released and is currently being developed further.
- The digital marketing strategy was expanded by way of an even wider social-media network, through **interactive communication means** like the Grain SA, NAMPO Harvest Day and NAMPO Cape websites, as well as through Facebook, Twitter and Instagram profiles.
- More than 23 700 people followed our **social-media footprint**, with a combined impact of 13 937 274 followers.
- Thanks to ongoing **media liaison**, Grain SA's total media coverage for the period under review increased by 14%.
- The **e-newsletter** was published fortnightly, while the ***SA Graan/ Grain*** magazine and the ***Pula Imvula*** newsletter for developing farmers appeared monthly.
- **Grain SA**'s service offer was expanded through the **exhibition area and member's hall** at the NAMPO Harvest Day. The relocation of the NAMPO merchandise to the NAMPO Hall was extremely successful.
- Visibility was maintained at **exhibitions, workshops and farmer days** that fit in with the target audience and focus of the organisation. These included the Boertjiefees, Swartland Show, conservation agriculture farmer days, future focus day, member golf days and various smaller agricultural initiatives.

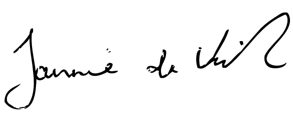
Summary

2017/2018 was a year in which the emotions of the producers with regard to land reform and safety on farms ran extremely high. In fact, the issues at farm level became increasingly emotional and less economic. Our people struggled with this uncertainty at macro, micro and climate level. This was cause for great concern to us as the Grain SA team, because as a producer organisation we are not equipped to deal with these psychological issues. However, you can be sure that the winds of uncertainty do not blow across farms only, but into every corner of the industry and into the hearts of every South African who holds farming dear.

The leadership and staff often had to operate outside our comfort zone and in uncharted waters this year to protect and promote the interests of producers and the sustainability of the industry. Thank you for trusting us with this. The Grain SA team (leaders and staff) was under great pressure this year. We present this report to you with sincere gratitude and in all humility. May God allow every sincere conversation, participation and intervention not to return to the grain industry in an empty state.

In order to survive these challenging and uncertain times, we will all have to acquire a lot of patience. This reminds me of the Israelites of old who had to circumnavigate the city of Jericho in silent prayer for six days before the breakthrough came on the seventh day.

Agriculture is the only sector that can contribute towards healing South Africa.



JF de Villiers
CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER

KOMMUNIKASIE EN OPENBARE BETREKKINGE

Graan SA se kommunikasie- en openbarebetrekkinge-strategie fokus op die deel van inligting en die skep van bewustheid oor graanproduksie onder belangrike interne en eksterne belanghebbendes. Die volgende aksies het uitgestaan:

- Die opgradering van **Graan SA se webwerf** is afgehandel.
- 'n Eksklusiewe **digitale ledekaart** via die **JOYN-app** is bekend gestel en word tans verder uitgerol.
- Die digitale bemarkingstrategie is uitgebrei deur 'n selfs wyer sosialemedianetwerk, deur **interaktiewe kommunikasiemiddele** soos die Graan SA-, NAMPO Oesdag- en NAMPO Kaap-webwerf, asook Facebook-, Twitter- en Instagram-profiele.
- Meer as 23 700 mense het ons **sosialemediavoetspoor** gevolg, met 'n gekombineerde trefkrag van 13 937 274 volgelinge.
- Te danke aan deurlopende **mediaskakeling**, het Graan SA se algehele mediadekking vir die oorsigtydperk met 14% toegeneem.
- Die **e-nuusbrief** is tweeweekliks uitgegee, terwyl die ***SA Graan/ Grain***-tydskrif en die ***Pula Imvula***-nuusbrief vir ontwikkelende boere maandeliks verskyn het.
- **Graan SA** se diensaanbod is uitgebrei deur die **uitstalarea en ledesaal** by die NAMPO Oesdag. Die verskuiwing van die NAMPO-handelsware na die NAMPO-saal was uiters suksesvol.
- 'n Sigbaarheid is gehandhaaf by **uitstallings, werkswinkels en boeredae** wat by die teikengehoor en fokus van die organisasie inpas. Dit het die Boertjiefees, Swartland Skou, Bewaringslandbou-boeredae, toekomsfokusdag, ledegholfdae en verskeie kleiner landbou-inisiatiewe ingesluit.

Samevatting

2017/2018 was 'n jaar waarin die emosies van produsente weens grondhervorming en veiligheid op plase uiters hoog geloop het. Om die waarheid te sê, het die aangeleenthede op plaasvlak meer en meer emosioneel en minder ekonomies geraak. Ons mense het dus met dié onsekerheid gestoei op makro-, mikro- en klimaatvlak. Dit het ons as Graan SA-span soms tot groot kommer gestem, want as 'n produsente-organisasie is ons nie toegerus om hierdie sielkundige aangeleenthede te hanteer nie. Waarvan u wel oortuig kan wees, is dat die winde van onsekerheid nie net op plase waai nie, maar regdeur elke hoekie van die bedryf en tot in die harte van elke Suid-Afrikaner wat 'n hart vir boerdery het.

Die leierskap en personeelkorps moes vanjaar dikwels buite ons gemaksone en in ongekarteerde waters opereer om produsente se belange en die volhoubaarheid van die bedryf te beskerm en te bevorder. Dankie dat u ons hiermee vertrou het. Die Graan SA-span (leiers en personeel) was onder groot druk die afgelope jaar. Ons lewer graag hierdie verslag aan u met groot dank en in alle nederigheid. Mag God gee dat elke opregte gesprek, deelname en intervensie nie leeg tot die graanbedryf sal terugkeer nie.

Om deur hierdie uitdagende en onseker tye te kom, is daar 'n stuk geduld wat ons almal sal moet aanleer. Dit laat my dink aan die volk Israel van ouds wat in stil gebed getrou rondom die stad Jerigo moes loop vir ses dae lank, voor die deurbraak op die sewende dag gekom het.

Landbou is die enigste sektor wat 'n bydrae kan lewer om Suid-Afrika gesond te maak.

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

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

3 Luzelle Botha
COMMITTEE OFFICER
KOMITEEBEAMPTE

4 Annemarie de Beer
EVENTS MANAGER
FUNKSIEBESTUURDER

5 Elray de Klerk
SUPPORT OFFICER: MARKETING
ONDERSTEUNINGSBEAMPTE: BEMARKING

6 Hailey Ehrenreich
COMMITTEE OFFICER: WESTERN CAPE
KOMITEEBEAMPTE: WES-KAAP

7 Alzena Gomes
PUBLIC RELATIONS OFFICER
SKAKELBEAMPTE

8 Marina Kleynhans
ADMINISTRATIVE CLERK
ADMINISTRATIEWE KLERK

9 Dirk Kotzé
MEMBER MARKETING AND COMMUNICATIONS OFFICER
LEDEBEMARKING- EN KOMMUNIKASIEBEAMPTE

10 Rialeen Lombard
SUPPORT OFFICER: HARVEST DAY
ONDERSTEUNINGSBEAMPTE: OESDAG

11 Corné Louw
SENIOR ECONOMIST: INPUTS
SENIOR EKONOOM: INSETTE

12 Patricia Mahlatsi
ADMINISTRATIVE OFFICER: LEVIES
ADMINISTRATIEWE BEAMPTE: HEFFINGS

13 Ikageng Maluleke
AGRICULTURAL ECONOMIST
LANDBOU-EKONOOM

14 Luan van der Walt
AGRICULTURAL ECONOMIST
LANDBOU-EKONOOM

15 Wim Venter
ADMINISTRATIVE OFFICER: HARVEST DAY
ADMINISTRATIEWE BEAMPTE: OESDAG

16 Carmen Visser
SECRETARY
SEKRETARESSE

17 Bennie Zaayman
GROUNDS MANAGER
TERREINBESTUURDER

STRATEGIC FOCUS AREAS

STRATEGIESE FOKUSAREAS

Grain economy
- Sustainable production
- Promotion of market information
- Monitoring of inputs
- Expansion and development of markets
- Influencing grain policy aspects

Marketing
- Recruitment of members and levies
- Grain SA NAMPO Harvest Day/NAMPO Cape
- *SA Graan/Grain* magazine

Graanekonomie
- Volhoubare produksie
- Bevordering van markinligting
- Monitering van insette
- Uitbreiding en ontwikkeling van markte
- Beïnvloed graanbeleidsaspekte

Bemarking
- Ledewerwing en heffings
- Graan SA NAMPO Oesdag/NAMPO Kaap
- *SA Graan/Grain*-tydskrif

HIGHLIGHTS

HOOGTEPUNTE

- Creating new market information.
  - Publishing processing figures per province.
  - Publication of intentions for imports and exports.
- Creating an Iran market.
- Applying and implementing the soybean breeding and technology levy.
- Negotiating import tariffs on inputs.
- Dispute settlement with reference to inputs.
- Registration of chemicals.
- Fertiliser monitoring project.
- Negotiation on new diesel rebate system.
- Ongoing communication with respect to marketing information.
- Soybean location differential and independent investigation.
- NAMPO Harvest Day/NAMPO Cape.

- Skep van nuwe markinligting.
  - Publisering van verwerkingsyfers per provinsie.
  - Publisering van intensies vir in- en uitvoere.
- Skep van Iran-mark.
- Aansoek en implementering van die sojaboon teling- en tegnologieheffing.
- Onderhandeling van invoertariewe op insette.
- Dispuutoplossing met betrekking tot insette.
- Registrasie van chemikalieë.
- Kunsmismoniteringsprojek.
- Onderhandeling oor nuwe dieselrabatstelsel.
- Volgehoue kommunikasie met betrekking tot bemarkingsinligting.
- Sojaboonliggingsdifferensiaal en onafhanklike ondersoek.
- NAMPO Oesdag/NAMPO Kaap.

A YEAR OF MANY HIGHLIGHTS
’N JAAR VAN VELE HOOGTEPUNTE

Grain economy and member marketing

GRAIN ECONOMY

The 2017/2018 production season is a year, that was characterised by late production and crop conditions in the summer production areas. Grain producers in the area produced an average maize crop.

The National Crop Estimates Committee (NEC) published a maize crop of 12,9 million tons and a soybean crop of 1,55 million tons in their final estimate. Given the previous season’s record crops, which led to large carryover stocks, together with the relatively good harvest, the ending stock levels remain high. This means that prices experienced drastic and rapid pressure and moved from import parity closer to export-parity levels. International prices were also under pressure due to extremely high stock levels in the global market.

Global trade was relatively uncertain – particularly for soybeans, due to the USA-China trade war. The low prices exert exceptional

Graanekonomie en ledebemarking

GRAANEKONOMIE

Die 2017/2018-produksieseisoen is ’n jaar wat gekenmerk is deur laat produksie- en oestoestande in die somerproduksiestreke. Graanprodusente in die gebied het ’n gemiddelde mielieoes geproduseer.

Die Nasionale Oesskattingskomitee (NOK) het ’n mielieproduksie van 12,9 miljoen ton en ’n sojaboonoes van 1,55 miljoen ton in hul finale skatting gepubliseer. Gegewe die vorige seisoen se rekordoeste wat groot oordragvoorrade tot gevolg gehad het, tesame met die relatiewe goeie oeste, bly eindvoorraadvlakke hoog. Dit beteken dat pryse drastiese en vinnige druk ervaar het en vanaf invoerpariteits- nader aan uitvoerpariteitsvlakke beweeg het. Die internasionale pryse is verder ook onder druk weens uiters hoë voorraadvlakke in die globale mark.

Wêreldhandel was ook betreklik onseker – veral op sojabone – weens die handelsoorlog tussen die VSA en China. Die lae pryse

pressure on the profitability of producers, and it has been confirmed once more that considerable work is needed to get local producers sustainably and profitably at export-parity levels. The exchange rate weakened considerably, and the price of Brent crude oil increased drastically, which led to inputs rising sharply.

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 distributing market information to enable producers to make better marketing decisions – including ad hoc reports, daily market reports, videos and presentations at farmers days.
- Consulting with the government on the regulatory environment to ensure the local market has export markets, and develops new export markets.

Grain SA, with the aid of the Maize Forum, held an export strategy planning day where all the role-payers gathered. The good news was that additional markets for trade could be unlocked. Iran is one of the markets that was recently unlocked. This market offers great opportunities, as South Africa has a logistic benefit. The challenge in terms of exports this season included that local prices were – for various reasons, not competitive in the global market.

In addition to the daily market information that the division distributes to all members and the public, the division also dealt with requests and negotiations for new market information at various levels. The statutory reporting of intentions for the import and export of maize was published for the first time. It is hoped that intentions for importing and exporting wheat will be reported on the same basis soon. The monthly processing figures, at provincial level, are published.

The demand for processing figures offered Grain SA a renewed opportunity to analyse the point of reference for grain trading and negotiate afresh on the basis of those facts. The location differential remains an obstacle to producers, and Grain SA managed to negotiate for soybean trading to maintain the status quo, and for an independent study to be conducted on the current establishment and operation of the differential system on all crops. The Commitment of Traders Report is also being investigated by the Financial Services Board (FSB) and it is hoped that, with the approval of this board, it will be published soon.

The training and distribution of market information remains a priority in Grain SA. Safex courses were regularly offered to producers, agribusinesses and financiers to make a contribution towards good marketing decisions. The free-market system can only function optimally if sufficient market information is available to all role-players in the value chain. Grain SA also entered into a partnership with the Bureau for Food and Agricultural Policy (BFAP) to more accurately measure how competitive the South African grain industry is compared to global competitors. This creates new insights in terms of where focus areas have to be created, and where to become involved in discussions with input providers and authorities. The information provided by the BFAP has already supported Grain SA in negotiations at various levels.

Sustainable production remains an important issue, and seed is an important part of this. An application for a statutory breeding and technology levy (R65/ton) was submitted in 2016 to improve the availability of seed technology. This will compensate breeders for progress with respect to new cultivars, but also for attracting new

plaas besondere druk op die winsgewendheid van produsente en dit is weer eens bevestig dat heelwat werk nodig is om die plaaslike produsente volhoubaar en winsgewend op uitvoerpariteitsvlakke te kry. Die wisselkoers het beduidend verswak en die Brent-ruolieprys het drasties gestyg – wat tot gevolg gehad het dat insette skerp gestyg het.

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

- Insetkostes te monitor, gegewe internasionale bewegings en neigings.
- Invoertariewe op insette te verwyder.
- Internasionale en plaaslike navorsingkoördinering vir die bevordering van produksie.
- Markinligting te versamel en te versprei om produsente in staat te stel om beter bemarkingsbesluite te neem – wat insluit ad hoc-verslae, daaglikse markverslae, video's asook gesprekke by boeredae.
- Konsultasie met die regering rakende die regulatoriese omgewing en om te verseker dat die plaaslike mark uitvoermarkte het en nuwe uitvoermarkte ontwikkel.

Graan SA het met behulp van die Mielieforum 'n uitvoerstrategiese beplanningsdag gehou waar al die rolspelers bymekaargekom het. Die goeie nuus is dat addisionele markte vir handel oopgemaak kon word. Iran is een van die markte wat onlangs geopen is. Die mark bied groot geleenthede, omdat Suid-Afrika 'n logistieke voordeel geniet. Die uitdaging in terme van uitvoere vir die seisoen was onder andere dat die plaaslike prys, weens verskeie redes, nie mededingend op die globale mark was nie.

Buiten vir die daaglikse markinligting wat die afdeling aan al die lede en die publiek beskikbaar stel, het die afdeling op verskeie vlakke versoeke en onderhandelings vir nuwe markinligting behartig. Die statutêre rapportering van intensies vir die invoer en uitvoer van mielies is vir die eerste keer gepubliseer. Intensies vir die in- en uitvoer van koring sal hopelik ook eersdaags op dieselfde basis gerapporteer word. Die maandelikse verwerkingsyfers, op provinsiale vlak, word gepubliseer.

Die aanvraag vir verwerkingsyfers het opnuut aan Graan SA die geleentheid gebied om die verwysingspunt van graanverhandeling te analiseer en met daardie feite, opnuut te onderhandel. Die liggingsdifferensiaal bly 'n knelpunt vir produsente en met onderhandelings het Graan SA dit reggekry dat sojaboonverhandeling die status quo handhaaf en dat 'n onafhanklike studie gedoen word oor die huidige bepaling en werking van die differensiaalstelsel op alle gewasse. Die verbintenis van handelaarsverslag (*Commitment of Traders Report*) word ook deur die Finansiële Diensteraad (FSB) ondersoek en kan hopelik met die goedkeuring van dié raad binnekort gepubliseer word.

Die opleiding en die verspreiding van markinligting bly 'n prioriteit binne Graan SA. Daar is op 'n gereelde basis Safex-kursusse vir produsente, landboubesighede asook finansierders aangebied, om sodoende 'n bydrae te lewer dat goeie bemarkingsbesluite geneem word. Die vryemarkstelsel kan slegs optimaal funksioneer indien voldoende markinligting vir alle rolspelers in die waardeketting beskikbaar is. Graan SA het ook 'n vennootskap met die Buro vir Voedsel en Landboubeleid (BFAP) aangegaan om meer spesifiek te bepaal hoe mededingend die Suid-Afrikaanse graanbedryf gemeet teen globale mededingers is. Dit skep nuwe insig in terme van waar fokusareas geskep moet word, maar ook om met insetverskaffers en owerhede in gesprek te tree. Die inligting wat BFAP beskikbaar stel, het Graan SA reeds op verskeie vlakke in onderhandelings ondersteun.

Volhoubare produksie bly 'n belangrike saak – en saadtegnologie vorm deel hiervan. 'n Aansoek vir 'n statutêre teling- en tegnologieheffing (R65/ton) is reeds in 2016 ingedien om beskikbaarheid van saadtegnologie te verbeter. Dit sal telers vergoed vir vordering met betrekking tot nuwe kultivars, maar om ook nuwe tegnologie na Suid-Afrika

technology to South Africa. Holding back of seed results in new technology not entering the South African market, but the levy can result in international role-players bringing the technology to South Africa. After many discussions and even interdicts, the application was approved and will come into effect in the 2019 production season. The benefit of the programme is that some of the technology has already been tested in South Africa. Yields are expected to increase by a possible 10% if technology is approved for production, which means that producers can be more sustainable.

In the winter grain production region the 2018 season was more rewarding than the 2017 season. Most of the region received good rains and resulting in expectations of an excellent crop. However, parts of the Southern Cape experienced a challenging season with the drought early in the season. Rain came relatively late, which put production under pressure. Later, very strong winds and frost in both regions dimmed expectations of good harvests. The turnaround strategy is still in progress, and except for changes such as the grade price discount and the relaxing of cultivar exemption criteria, which have already occurred, we are still working on factors like improving the import tariff system, changing the grading and implementing a price discount on foreign Safex deliveries, as well as further relaxations.

Grain SA is also establishing that pricing in the barley industry occurs in a fair manner. A legal opinion was even submitted to the Competition Commission. As far as canola is concerned, challenges were experienced in terms of the germination of seed. Grain SA played a significant role in solving the challenges for producers. A positive development is that the import tariff on canola seed was removed, which means that producers can purchase import-tariff-free seed in future.

The payout of the diesel rebate remains a major challenge. Grain SA submitted new proposals on dealing with the diesel rebate, as well as possible future changes. Furthermore, meetings with key employees at the South African Revenue Services (SARS) were held on an ongoing basis and Grain SA managed to get the head office of SARS to create a channel through which we can report objections from members if they do not receive satisfactory solutions through the normal channels. Grain SA continues to support its members by finding solutions in collaboration with the auditors of these members.

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 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

A new record attendance figure was again achieved at NAMPO 2018, and the feedback from exhibitors was that they generally did good business. According to ticket sales, 82 817 visitors streamed through the gates to visit the 746 exhibitors, and to enjoy the family atmosphere and farm hospitality that are so unique to Harvest Day. The private airstrip at NAMPO Park handled 361 light aeroplanes and helicopters, ferrying a variety of visitors there, with ease.

A study done among exhibitors by the marketing team received extremely positive feedback and the team was specifically commended for the professional management of the Harvest Day. It is extremely important to Grain SA that the local economy should also benefit from the event, and exhibitors indicated that, on average, R51 800 was spent locally on accommodation, meals and labour. This amounts to a total of R38,7 million spent by the exhibitors only. Note that this

te lok. Terughouding van saad het tot gevolg dat nuwe tegnologie nie die Suid-Afrikaanse mark betree nie, daarom kan die heffing meebring dat internasionale rolspelers die tegnologie na Suid-Afrika bring. Na menige gesprekke en selfs interdikte is die aansoek goedgekeur en sal dit reeds in die 2019-produksieseisoen in werking tree. Die voordeel van die program is dat van die tegnologie reeds binne Suid-Afrika getoets is. Die verwagting is dat opbrengste met 10% kan verhoog as tegnologie vir produksie goedgekeur word, wat beteken dat produsente meer volhoubaar kan wees.

In die wintergraanproduksiestreek was die 2018-seisoen meer belowend as die 2017-seisoen. Die grootste gedeelte van die streek het goeie reëns ontvang en daar was daarom verwagtinge van 'n voortreflike oes. Dele van die Suid-Kaap het egter, met droogte vroeg in die seisoen, 'n uitdagende seisoen ervaar. Reën het daarom betreklik laat geval, wat druk op produksie geplaas het. Later het besondere sterk winde en rypskade in albei streke die verwagtinge van goeie oeste gedemp. Die omdraaistrategie is steeds in proses en buiten vir die veranderinge soos die graadprysdiskonto en die verslapping van kultivarvrystellingskriteria, wat reeds plaasgevind het, word daar nog steeds gewerk aan faktore soos die verbetering van die invoertariefstelsel, die verandering van die gradering en die implementering van 'n prysdiskonto op buitelandse Safex-lewerings asook verdere verslappings.

Graan SA is voorts besig om homself binne die garsbedryf daarvan te vergewis dat prysbepalings regverdig plaasvind. Daar is selfs 'n regsopinie by die Mededingingskommissie ingedien. Wat kanola betref, is uitdagings ervaar in terme van die ontkieming van saad. Graan SA het 'n beduidende rol in die oplossing van die uitdagings vir produsente gespeel. 'n Positiewe wending is dat die invoertarief op kanolasaad wel verwyder is, wat beteken dat produsente in die toekoms invoertariefvrye saad kan aankoop.

Die uitbetaling van die dieselrabat is en bly 'n groot uitdaging. Graan SA het nuwe voorstelle ingedien met betrekking tot die hantering van die dieselrabat en moontlike toekomstige veranderinge. Verder is daar op 'n deurlopende basis met sleutelpersoneel by die Suid-Afrikaanse Inkomstediens (SAID) vergader en het Graan SA dit reggekry dat SAID se hoofkantoor vir ons 'n kanaal skep waardeur ons lede se besware kan aanmeld, sou sodanige produsente nie deur middel van die normale kanale regkom nie. Graan SA hou vol om lede te ondersteun deur oplossings in samewerking met sodanige lede se ouditeurs te vind.

'n Groot aantal van die bogenoemde veranderlikes bly kommerwekkend vir die bedryf en gaan deurentyd steeds aandag geniet – ten spyte van positiewe verwikkelinge en oplossings. Dit bly belangrik om te verseker dat ons produsente effektiewe, betroubare inligting het om hul aankoop- en bemarkingsbesluite te ondersteun en volhoubare produksie te verseker. Die afdeling het 'n span kundiges wat die visie nastreef.

NAMPO

'n Nuwe rekord-bywoningsyfer is weer tydens NAMPO 2018 behaal en die terugvoer van uitstallers is dat hulle oorwegend goeie besigheid gedoen het. Volgens die kaartjieverkope het 82 817 besoekers deur die hekke gestroom om die 746 uitstallers te besoek en die familie-atmosfeer en plaasgasvryheid wat so eie aan die Oesdag is, te kom geniet. NAMPO Park se privaat vliegveld het 361 ligte vliegtuie en helikopters – wat 'n verskeidenheid van besoekers daarheen vervoer het – met gemak ontvang.

Na aanleiding van 'n studie wat deur die bemarkingspan onder uitstallers gedoen is, was die terugvoer uiters positief en is die span spesifiek gekomplimenteer met die professionele bestuur van die Oesdag. Dit is vir Graan SA uiters belangrik dat die plaaslike ekonomie ook by die geleentheid baat vind, en uitstallers het aangedui dat hul gemiddeld R51 800 plaaslik aan verblyf, etes en arbeid spandeer het. Dit is 'n totaal van R38,7 miljoen wat slegs deur uitstallers spandeer is.

amount excludes visitors' spending on items. The total value of stock at NAMPO was an estimated R1,5 billion – an average of R1,98 million per exhibitor. The exhibitors further spent R125 753 per exhibiting space in order to meet the high exhibiting standard and to make their exhibits valuable to visitors. This was a total spend of R94 million, including the building of exhibiting spaces, transport of equipment, etc.

Neem in ag dat dit besoekers se spandering op die items uitsluit. Die totale waarde van voorraad by NAMPO was 'n beraamde R1,5 miljard – 'n gemiddeld van R1,98 miljoen per uitstaller. Die uitstallers het verder R125 753 per uitstalruimte spandeer om dit teen die vereiste hoë gehalte ten toon te stel en waardevol vir besoekers te maak. Dit is 'n totale spandering van R94 miljoen – en dit sluit die bou van uitstalruimtes, vervoer van toerusting ensovoorts in.

1 Statistics for exhibitors' spending
Statistiek van die spandering van uitstallers

	Average Gemiddeld	Total Totaal
Local economy: Accommodation, food and wages/Plaaslike ekonomie: Verblyf, voedsel en lone	R51 800	R38,7 million/miljoen
Stock value/Voorraadwaarde	R1,98 million/miljoen	R1,5 billion/miljard
Spending on erecting exhibiting space/Spandeer aan oprigting van uitstalruimtes	R125 753	R94 million/miljoen

Please note: Estimates from questionnaires
Let wel: Beramings vanaf vraelyste

It is also noteworthy that the number of non-agriculture visitors and numerous media representatives from outside the agricultural media have increased. From formal and informal discussions it is clear that they also come to NAMPO because they enjoy it. The growing interest of black farmers in the show is a significant positive element to Grain SA.

Foreign exhibitors' interest in NAMPO as a platform for reaching the rest of Africa continues. Approximately 76 international exhibitors were housed in eight foreign pavilions – which each involved at least eight exhibitors from each country as part of their exhibits. Representatives from Israel, Poland, England, America, Argentina, India, France, Italy, Denmark, China, Turkey and Russia participated in the Harvest Day.

Grain SA always attempts to retain an exclusive focus on agriculture at NAMPO. The selection of exhibitors and the items on the programme are consistently arranged with this in mind. This year the Nation in Conversation forum made a strong contribution to the land debate. Fittingly, in the 30th year in which the Farmer Patent Competition was presented, Grain SA welcomed Omnia and *Landbouweekblad* as additional partners.

The poor condition of various public roads in the area of NAMPO Park is of great concern. This places enormous pressure on certain routes and hampers the steady flow of traffic to and from the showgrounds.

During the year under review Grain SA also teamed up with the Bredasdorp Park NPC and NAMPO Cape was presented for the first time. After many planning sessions and adaptation of systems it was gratifying and a great blessing to be able to say that it was a major

Dit was ook opvallend dat die aantal nie-landboubesoekers en talle mediaverteenwoordigers van buite die landboumedia toegeneem het. Uit formele en informele gesprekke is dit duidelik dat hulle ook NAMPO toe kom omdat dit vir hulle lekker is. Die groeiende belangstelling van swart boere in die skou is vir Graan SA 'n beduidende pluspunt.

Buitelandse uitstallers se belangstelling in NAMPO as 'n platform om die res van Afrika te bereik, duur voort. Nagenoeg 76 internasionale uitstallers is gehuisves in agt buitelandse paviljoene, wat beteken dat ten minste agt uitstallers van elke land deel van die uitstallings gevorm het. Verteenwoordigers van Israel, Pole, Engeland, Amerika, Argentinië, Indië, Frankryk, Italië, Denemarke, China, Turkye en Rusland het aan die Oesdag deelgeneem.

Graan SA poog deurlopend dat NAMPO 'n uitsluitlike fokus op landbou behou. Die keuring van uitstallers en die items op die program word getrou hiervolgens gerig. Vanjaar het die Nasie in Gesprek-forum 'n sterk bydrae tot die gronddebat gelewer. In pas met die 30ste jaar wat die Boerepatentekompetisie aangebied is, het Graan SA Omnia en *Landbouweekblad* as bykomende vennote verwelkom.

Die swak toestand van verskeie openbare paaie in die omgewing van NAMPO Park is kommerwekkend. Dit plaas geweldige druk op sekere roetes en kortwiek die bestendige vloei na en van die skouterrein.

Graan SA het in die jaar onder oorsig ook in vennootskap getree met die Bredasdorp Park NPC en sodoende is NAMPO Kaap vir die eerste keer aangebied. Na vele beplanningsessies en aanpassing van stelsels is dit verblydend en 'n groot seën om te kan sê dat dit 'n groot sukses was. Die gemeenskap van Bredasdorp en omliggende dorpe asook

NAMPO PARK GROUNDS STAFF
NAMPO PARK-TERREINPERSONEEL

success. The community of Bredasdorp and the surrounding towns as well as 306 exhibitors supported the show and there were 16 245 visitors to NAMPO Cape from 12 to 14 September 2018.

The NAMPO principles and values were used to present a show of the same standard as that in Bothaville. The show once again proved its importance to the Western Cape and the community also did good business. Accommodation was fully booked, restaurants overflowed in the evenings and local businesses such as filling stations prospered. To a rural community it was a significant cash injection. NAMPO Cape will take place again from 4 to 6 September 2019.

SA GRAAN/GRAIN MAGAZINE

Grain SA publishes the *SA Graan/Grain* magazine on a monthly basis and distributes it to approximately 18 000 readers. 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* promotes the image of Grain SA to its members, the public and opinion makers in the industry and in 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 better get to know Grain SA, as a trendsetting organisation.

The magazine is supported by the contributions of all the advertisers, and *SA Graan/Grain*'s editorial team therefore wants to thank every advertiser for their continued support.

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. During the 2017/2018 marketing year the first pressures were experienced with the low commodity prices in the interior, as well as of the drought in the Cape. Nevertheless, producers continued to make their contributions faithfully. Grain SA would like to thank all members who loyally make their contributions on all tons delivered. However, members can be assured that active attention was given to savings 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.

306 uitstallers het die skou ondersteun en tussen 12 tot 14 September 2018 was daar 16 245 besoekers by NAMPO Kaap.

Die beginsels en waardes van NAMPO is gebruik om 'n skou op dieselfde standaard as dié op Bothaville aan te bied. Die skou het weer bewys dit vir die Wes-Kaap belangrik is en die gemeenskap het ook goeie besigheid gedoen. Akkommodasie was volbespreek, restaurante was oorvol saans en lokale besigheid soos vulstasies het floreer. Vir 'n plattelandse gemeenskap was dit 'n beduidende kontantinspuiting. NAMPO Kaap vind weer volgende jaar van 4 tot 6 September 2019 plaas.

SA GRAAN/GRAIN-TYDSKRIF

Graan SA publiseer maandeliks die *SA Graan/Grain*-tydskrif, wat aan nagenoeg 18 000 lesers versend word. 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 hul 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 bevat 'n balans van toepaslike bedryfsinligting sowel as tegniese en navorsingsgebaseerde artikels. Onderwerpe soos graanmarktendense, 'n insetoorsig, wenke oor goeie arbeidspraktyke, die klimaat en selfs politieke en ekonomiese kommentaar word deurlopend aangebied. Die 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 markaandeel in die semi-kommersiële tydskriftemark, 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 dié tydskrif kan lesers ook vir Graan SA – as toonaangewende organisasie – beter leer ken.

Die tydskrif is wel ook moontlik gemaak deur die bydrae van al die adverteerders en *SA Graan/Grain* redaksionele span wil elke adverteerder graag bedank vir hul volgehoue ondersteuning.

Heffingsafdeling

BEDRYFSHEFFING

Groot dank word uitgespreek aan lede van Graan SA wat die afgelope jaar hul heffings getrou betaal het. Die heffinginkomste bly steeds vir Graan SA sy belangrikste bron van inkomste. In die 2017/2018-bemarkingsjaar is die eerste druk met die lae kommoditeitspryse in die binneland sowel as die droogte in die Kaap beleef; nietemin het produsente getrou hul bydraes gemaak. Graan SA bedank alle lede wat lojaal hul bydraes op alle gelewerde tonne maak. Lede kan daarvan seker wees dat daar daadwerklik aan uitgawes bespaar is, om sodoende te kompenseer vir die kleiner inkomste van die bedryfsheffings.

LIDMAATSKAP BY 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.

The levy per ton per crop for **2018/2019** is as follows:

Crop	Levy per ton
Summer grains	
Maize	R2,85
Sorghum	R2,85
Soybeans	R5,70
Sunflower	R5,70
Groundnuts	R11,00
Winter cereals	
Wheat	R3,35
Canola	R4,50
Barley	R3,35
Other grains	R3,35

Please note: VAT is excluded on the above amounts

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

Exclusive benefits were also created for new members:

- The Momentum policy package was revised and adjusted to members' needs.
- Ford offers Grain SA members special prices on any vehicle.
- The Grain SA app offers marketing information only to Grain SA members.

COLLECTION OF LEVY

Levies are collected in the following ways:

- **By the 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 on page 27.

- **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 farmers market their grain to parties who do not form part of the Grain SA levy structures.

EMPLOYMENT OF LEVY

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

Die heffing per ton per gewas vir **2018/2019** is soos volg:

Gewas	Heffing per ton
Somergrane	
Mielies	R2,85
Sorghum	R2,85
Sojabone	R5,70
Sonneblom	R5,70
Grondbone	R11,00
Wintergrane	
Koring	R3,35
Kanola	R4,50
Gars	R3,35
Ander grane	R3,35

Let wel: BTW is uitgesluit op bogenoemde bedrae

Nuwe era-boere wat graan produseer kan ook 'n lid van Graan SA word deur die neergelegde gelde (dieselfde as dié vir kommersiële lede) te betaal.

Eksklusiewe voordele is ook vir nuwe lede geskep:

- Momentum se polispakket is hersien en aangepas volgens lede se behoeftes.
- Ford bied spesiale pryse op enige voertuig vir Graan SA-lede aan.
- Die Graan SA-app bied bemarkingsinligting slegs vir Graan SA-lede.

INVORDERING VAN HEFFING

Heffings word op die volgende wyses ingesamel:

- **Deur vorderingsagente**

  Vorderingsagente 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 op bladsy 27.

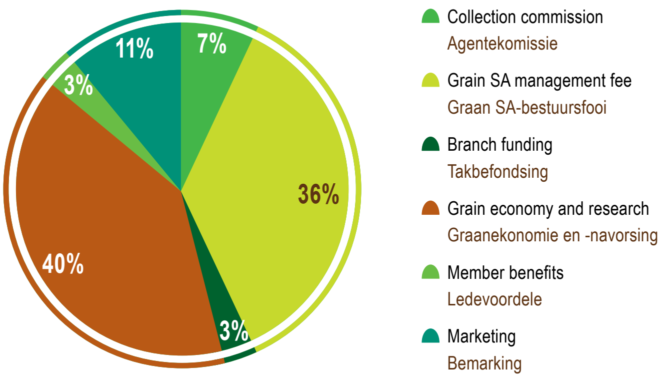
- **Direkte oorbetalings**

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

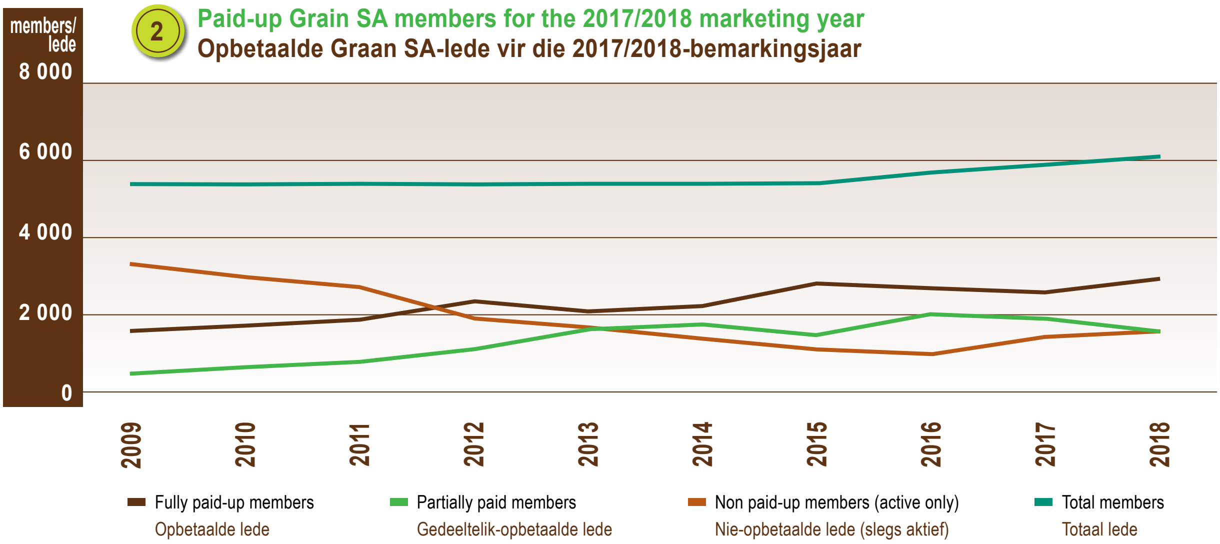
AANWENDING VAN HEFFING

Die aanwending van die heffing word alleenlik deur lede tydens die jaarlikse Kongres goedgekeur. Die volgende grafiek dui aan hoe die heffing tydens die Kongresjaar aangewend is.

1 **Employment of levy in the 2017/2018 marketing year**
Aanwending van heffings in die 2017/2018-bemarkingsjaar



2 Paid-up Grain SA members for the 2017/2018 marketing year
Opbetaalde Graan SA-lede vir die 2017/2018-bemarkingsjaar



The main part of the levy fund (40%) is employed for grain economy and research matters.

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.

MEMBER STATISTICS

During the 2017/2018 Congress year the number of paid-up members increased. The number of members who did contribute but did not pay the minimum amount has decreased, which is positive. The total number of members also increased satisfactorily since the previous year. This can largely be attributed to the more favourable agricultural conditions compared to the previous year. The number of paid-up members has also 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.

Die grootste gedeelte van die heffingsfonds (40%) word aangewend vir graanekonomie- en navorsingsaangeleenthede.

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

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

LEDESTATISTIEKE

Tydens die 2017/2018-Kongresjaar het die aantal opbetaalde lede toegeneem. Die aantal lede wat wel 'n bydrae gelewer het, maar nie die minimumbedrag betaal het nie, het egter afgeneem – wat positief is. Die totale aantal lede het ook bevredigend toegeneem sedert die vorige jaar. Dit kan grotendeels toegeskryf word aan die gunstiger landboutoestande gemeet teen die vorige jaar. Die aantal opbetaalde studiegroeplede het ook sedert die vorige termyn toegeneem.

Graan SA bedank elke lid vir sy/haar bydrae tot 'n organisasie wat 'n kritiese rol in die volhoubaarheid van graanproduksie in Suid-Afrika speel.

Grain SA's collection agents
Graan SA se vorderingsagente

Stakeholders

The Department of Agriculture, Forestry and Fisheries (DAFF)
Department of Trade and Industry (dti)
National Treasury
South African Revenue Services (SARS)
International Trade Administration Commission (ITAC)
National Agricultural Marketing Council (NAMC)
National Crop Estimates Committee (CEC)
SANSOR
CropLife
Fertasa
SAAMA
Commodities forums
Protein Research Foundation (PRF)
Bureau for Food and Agricultural Policy (BFAP)
Agribusinesses
Input providers
Grain dealers
Levy collection agents
NAMPO exhibitors
Agricultural writers
Agri SA
Provincial agricultural unions
SAGL
SAGIS
JSE – Safex
South African Cereals and Oilseeds Trade Association (Sacota)
Agbiz
Animal Feed Manufacturers Association (AFMA)
Commodity organisations
Commodity trusts
TAU
SA Cultivar and Technology Agency (SACTA)
ARC
National Chamber of Milling (NCM)
AFMA

Communication and public relations

Grain SA's communication and public relations strategy remains focused on information sharing and creating awareness of grain production amongst key internal and external stakeholders. This strategy describes how information is disseminated, how the strategy will be executed and messages developed for a variety of purposes inside and outside of the organisation. It further meticulously sets out the activities to manage and orchestrate the internal and external communications aimed at creating an understanding of the organisation's activities, goals and aspirations to the agricultural partner-landscape.

FOCUS AREAS

- **Real-time communication**

  The effectiveness of real-time communication, disseminated quickly, based on current events.

- **Visual content**

  Visual content, with an educational, or informative focus to engage members, agri-stakeholders and the broader public with strong emphasis on the Grain SA identity and image.

- **Brand Grain SA**

  Enhancing an understanding of the Grain SA and NAMPO brands and their respective performances, influence and credibility, positively positioned through media engagement activities.

Belanghebbendes

Departement van Landbou, Bosbou en Vissery (DLBV)
Departement van Handel en Nywerheid (DHN)
Nasionale Tesourie
Suid-Afrikaanse Inkomstediens (SAID)
Internasionale Handelsadministrasie-kommissie (IHIK)
Nasionale Landboubemarkingsraad (NLBR)
Nasionale Oesskattingskomitee (NOK)
SANSOR
CropLife
Fertasa
SALMA
Kommoditeiteforums
Proteïennavorsingstigting (PNS)
Buro vir Voedsel en Landboubeleid (BVLB)
Landboubesighede
Insetverskaffers
Graanhandelaars
Heffinginvorderingsagente
NAMPO-uitstallers
Landbouskrywers
Agri SA
Provinsiale landbou-unies
SAGL
SAGIS
JSE – Safex
Suid-Afrikaanse Graan en Oliesadehandelsvereniging (Sacota)
Agbiz
Dierevoedingvervaardingsvereniging (AFMA)
Kommoditeite-organisasies
Kommoditeitetrusts
TLU
SA Cultivar and Technology Agency (SACTA)
LNR
Nasionale Meulenaarskamer (NMK)
AFMA

Kommunikasie en openbare betrekkinge

Graan SA se kommunikasie- en openbarebetrekkinge-strategie fokus steeds op die deel van inligting en die skep van bewustheid oor graanproduksie onder belangrike interne en eksterne belanghebbendes. Hierdie strategie beskryf hoe inligting versprei word, hoe die strategie uitgevoer word en boodskappe vir 'n verskeidenheid doeleindes binne en buite die organisasie ontwikkel word. Dit sit verder die aktiwiteite om die interne en eksterne kommunikasie te bestuur en saam te stel met die oogmerk om 'n begrip van die organisasie se aktiwiteite, doelwitte en aspirasies in die landbouvennootlandskap te skep, noukeurig uiteen.

FOKUSAREAS

- **Intydse kommunikasie**

  Die doeltreffendheid van intydse kommunikasie wat vinnig gedissemineer word en op aktuele sake gegrond word.

- **Visuele inhoud**

  Visuele inhoud met 'n opvoedkundige of informatiewe fokus en 'n sterk klem op die Graan SA-identiteit en -beeld om lede, landbou-belanghebbendes en die breër publiek te betrek.

- **Handelsmerk Graan SA**

  Bevordering van die begrip van die Graan SA- en NAMPO-handelsmerk en elkeen se prestasie, invloed en geloofwaardigheid, met 'n positiewe posisionering deur middel van mediabetrokkenheids-aktiwiteite.

- **Stakeholder relations**

  Improve Grain SA's reputation and perceptions among grain producers, agricultural partners and government stakeholders through transparent and effective engagements.
- **Internal communication**

  Managing internal reputation and support to all business functions with their respective communication requirements.
- **Media relations**

  Maintaining and building relationships with local, international and mainstream press in an ever changing media landscape.
- **Digital influence and impact**

  Reaching members and stakeholders online through coherent messages, whilst observing shifting media usage and consumption of target audience's divided attention between different digital media types.
- **Partnerships**

  Much more value can be achieved with a realisation of how all the agri-parts fit together in the big picture. Communication cross-over between agribusinesses creates shared objectives and collaboration driving a shared vision and purpose for the industry as a whole.

Our public relations activities in the year under review, successfully:

- Continued its focus on media engagement, as we sought to formalise relationships in order to ensure longevity and long-term impactfulness, ultimately resulting in increased awareness of the organisation and its strategic focus areas.
- Provided support to Congress, NAMPO Harvest Day, NAMPO Cape and Swartland Show and organised Day of Celebration, and Grain Producer of the Year functions.
- Raised the organisation's profile through media activities compliment-ing the broader communication strategy.
- Built the organisation's online presence further through a digital strategy through an effective website, utilising social media, online campaigns and identifying much needed resources for online and web marketing.
- Continued to navigate through the much debated topics of land reform, expropriation without compensation and farmer development whilst highlighting the importance of each grain producer's role towards food security.

Media liaison remains an important function to promote and maintain the best image of the organisation, by not only encouraging better knowledge and understanding of its objectives by the news media, but also to effectively communicate background information on matters affecting grain producers, through the media to the public.

OUR ACCOMPLISHMENTS

- Streamlining and fine-tuning the organisation's website, which remains the gateway to knowledge about the organisation's work and a source of information for use by all – both national and international.
- Launching various platforms to broaden communication channels with members, including an exclusive digital membership card.
- Further expansion of the digital marketing strategy through an even wider social media network, through interactive communication tools including the Grain SA, NAMPO Harvest Day and NAMPO Cape websites, as well as Facebook, Twitter and Instagram profiles. Over 23 700 people followed our social media footprint with a combined reach of 13 937 274.

- **Belanghebbendebetrekkinge**

  Verbetering van Graan SA se reputasie en persepsies onder graan-produsente, landbouvennote en regeringsbelanghebbendes deur middel van deursigtige en doeltreffende betrokkenheid.
- **Interne kommunikasie**

  Bestuur van die interne reputasie en ondersteuning aan alle sake-funksies met hulle onderskeie kommunikasievereistes.
- **Mediabetrekkinge**

  Instandhouding en bou van verhoudinge met plaaslike, internasionale en hoofstroompers in 'n immer veranderende medialandskap.
- **Digitale invloed en impak**

  Bereiking van lede en belanghebbendes aanlyn deur samehangende boodskappe terwyl wisselende mediagebruik en verbruik van die teikengehoor se verdeelde aandag tussen verskillende digitale mediatipes waargeneem word.
- **Vennootskappe**

  Baie meer waarde kan bereik word met die besef van hoe al die land-boudele in die groot prentjie by mekaar inpas. Kommunikasiekruising tussen landboubesighede skep gedeelde doelwitte en samewerking om 'n gedeelde visie en doel vir die bedryf as geheel aan te dryf.

Ons openbarebetrekkinge-aktiwiteite het in die oorsigjaar met sukses:

- Hulle fokus op mediabetrokkenheid voortgesit met 'n poging om betrekkinge te formaliseer ten einde oorlewing en langtermynimpak te verseker, wat uiteindelik tot groter bewustheid van die organisasie en sy strategiese fokusareas lei.
- Steun vir die Kongres, NAMPO Oesdag, NAMPO Kaap en die Swartland Skou verskaf en die Feesdag- en Graanprodusent van die Jaar-funksies gereël.
- Die organisasie se profiel verbeter deur media-aktiwiteite wat die breër kommunikasiestrategie aanvul.
- Die organisasie se aanlyn-teenwoordigheid verder uitgebou deur 'n digitale strategie met behulp van 'n doeltreffende webwerf, die benutting van sosiale media, aanlynveldtogte en die identifisering van broodnodige hulpbronne vir aanlyn- en webbemarking.
- Voortgegaan om die veel-gedebatteerde onderwerpe van grondher-vorming, onteiening sonder vergoeding en landbou-ontwikkeling te navigeer terwyl die belangrikheid van elke graanprodusent se rol ten opsigte van voedselsekerheid beklemtoon is.

Mediaskakeling bly 'n belangrike funksie om die beste beeld van die organisasie te bevorder en te handhaaf, nie net deur beter kennis en begrip van sy doelwitte by die nuusmedia aan te moedig nie, maar om doeltreffend deur middel van die media die agtergrondinligting oor kwessies wat graanprodusente raak aan die publiek oor te dra.

ONS PRESTASIES

- Vaartbelyning en afronding van die organisasie se webwerf, wat die poort tot kennis oor die organisasie se werk en 'n inligtingsbron vir almal – nasionaal en internasionaal – se gebruik bly.
- Bekendstelling van verskillende platforms om kommunikasiekanale met lede te verbreed, insluitend 'n eksklusiewe digitale ledekaart.
- Verdere uitbreiding van die digitale bemarkingstrategie deur middel van 'n selfs wyer sosialemedianetwerk, deur interaktiewe kommunikasiemiddele soos die Graan SA-, NAMPO Oesdag- en NAMPO Kaap-webwerf, asook Facebook-, Twitter- en Instagram-profiele. Meer as 23 700 mense het ons sosialemedia-voetspoor gevolg, met 'n gekombineerde trefkrag van 13 937 274 volgelinge.

- Effectively integrated communication efforts to support the organisation's interactions with the various agricultural stakeholder groups and improve the quality of exchanges.
- Endeavoured to further share 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.
- Interacted with stakeholders and media partners through available networking opportunities, symposiums, workshops and media tours.
- Extended the service offering of the Grain SA exhibition area and members' hall at the NAMPO Harvest Day focusing on the support offered to each producer. The NAMPO merchandise was moved to the NAMPO Hall and proved extremely successful in its own right.
- Participated in and supported the Nation in Conversation initiative, a successful actuality agri-discussion broadcast during NAMPO Harvest Day. The 2018 themes covered policy matters, political perspectives, United Nations: Decade of family farming, inspirational women, economy of scale, agriculture 2035 and how the youth sees agriculture.
- Supported member marketing efforts at exhibitions, workshops and farmers days with aligned audiences and focus to that of the organisation which included the Boertjiefees, Swartland Show, CA farmers days, future focus, membership golf days and various smaller agricultural initiatives.
- Presented outstanding functions to showcase the successes of South African grain producers, big and small.

Values that drive our public relations efforts

Embracing **transparency**, recognising that open and honest communication is the most effective.

Valuing **authenticity**, recognising that communication efforts must be a reflection of organisational behaviour in order to be credible.

Recognising that good public relations will always be about engagement, recognising that mutual understanding requires **dialogue**, and that effective communication requires listening at least as much as it involves talking.

Striving for **humility**, recognising that a hint of arrogance in today's digital and social media will be met with hostility.

Value **engagement**, inviting active participation by members and other stakeholders, with communication designed to engage and motivate.

OUR COMMUNICATION

Aspire to continuously shape relations with policy makers, government departments and other agricultural partners to further improve awareness, understanding and value of the South African grain producers and their vital role in ensuring food security. The organisation's member communication is facilitated through various channels, which include a bi-weekly newsletter, ad-hoc electronic communication, news flashes and utilising digital media channels.

Grain SA newsletter and *News Flash*

The *Perspective* is an electronic newsletter, distributed bi-weekly 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

- Kommunikasiepogings is doeltreffend geïntegreer om die organisasie se interaksie met die onderskeie landboubelanghebbendegroepe te ondersteun en die gehalte van interaksie te verbeter.
- Verdere pogings is aangewend om die kennis-databasis wat op die bladsye van die *SA Graan/Grain*-tydskrif verskyn met teikengehore te deel deur topartikels 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.
- Interaksie met belanghebbendes en mediavennote deur beskikbare netwerkgeleenthede, simposiums, werkswinkels en mediatoere.
- Uitbreiding van die diensaanbod van die Graan SA-uitstalarea en ledesaal by die NAMPO Oesdag, met die fokus op die steun wat aan elke produsent verskaf word. Die NAMPO-handelsware is na die NAMPO-saal verskuif en dit was uiters suksesvol in eie reg.
- Daar is deelgeneem aan die Nasie in Gesprek-inisiatief, 'n suksesvolle aktualiteitsbespreking oor landbou wat tydens NAMPO Oesdag uitgesaai word. Die 2018-temas het beleidsake, politieke perspektiewe, die Verenigde Nasies se dekade van familieboerdery, inspirerende vroue, skaalbesparings, landbou 2035 en die jeug se siening van landbou ingesluit.
- Lede se bemarkingspogings is by uitstallings, werkswinkels en boeredae ondersteun met 'n teikengehoor en fokus wat by die organisasie inpas. Dit het die Boertjiefees, Swartland Skou, BL-boeredae, toekomsfokus, ledegholfdae en verskeie kleiner landbou-inisiatiewe ingesluit.
- Merkwaardige funksies is aangebied om die suksesse van Suid-Afrikaanse graanprodusente – groot en klein – te bevorder.

Waardes agter ons openbarebetrekkinge-pogings

Omarming van **deursigtigheid**, met die besef dat oop en eerlike kommunikasie die doeltreffendste is.

Waardering van **egtheid**, met die besef dat kommunikasiepogings die organisasie se gedrag moet weerspieël om geloofwaardig te wees.

Besef dat goeie openbare betrekkinge altyd oor betrokkenheid sal gaan, erken dat wedersydse begrip **dialoog** vereis, en dat doeltreffende kommunikasie luister ten minste soveel soos praat behels.

Strewe na **nederigheid**, met die besef dat die geringste arrogansie in vandag se digitale en sosiale media met vyandigheid begroet sal word.

Waardering van **betrokkenheid**, met die aktiewe deelname van lede en ander belanghebbendes en kommunikasie wat ontwerp is om betrokkenheid en motivering aan te moedig.

ONS KOMMUNIKASIE

Streef daarna om deurlopend werksverhoudinge met beleidmakers, staatsdepartemente en ander landbouvennote te vorm om bewustheid van, en begrip en waardering vir Suid-Afrikaanse graanprodusente en hul noodsaaklike rol in die versekering van voedselsekerheid verder te verbeter. Die organisasie se ledekommunikasie word gefasiliteer deur verskillende kanale, wat 'n tweeweeklikse nuusbrief, ad hoc-elektroniese boodskappe, nuusflitse en die benutting van sosialemedia-kanale insluit.

Graan SA-nuusbrief en *Nuusflits*

Die *Perspektief* is 'n elektroniese nuusbrief wat elke tweede week aan lede en aan 'n geselekteerde groep belanghebbendes versprei word. Die doel is om inligting en gebeure en belangrike datums met lede 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

important matters such as agricultural production conditions and biosecurity are communicated.

Publications

Grain SA produces the *SA Graan/Grain*, 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 industries.

In addition to its magazine, Grain SA also publishes the *Pula Imvula* – a monthly publication in seven languages aimed at developing new era commercial grain producers. Grain SA also publishes the annual *Grain Guide* which contains useful contacts and reference articles on seed, implements, fertilising, integrated pest management, livestock, money and financial services, and last but not least, Grain SA information, important contacts and an updated calendar for the coming year.

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 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 R103 929 266, up from R74 122 083 during the last reporting period. This coverage comprises an AVE value of R48 560 321 (up 24%) for print media coverage, an AVE value of R20 118 283 (up 9%) for broadcast coverage, and R35 250 662 (up 114%) for online media coverage. The resulting numbers are the equivalent of what an advertiser would have paid if it placed an advertisement of that size or in that 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 indicates the majority of print, broadcast and online coverage was generated during the months of March 2018, May 2018 and August to September 2018.

October 2017 media coverage were dominated by the new wheat breeding platform and the gala awards announcements. The new year kicked off with fall armyworm reports, the announcement of Grain SA taking NAMPO to the Cape as well as the drought conditions which affected the South African maize belt. The biosecurity trend continued during the month of February, which was entirely dominated by the

jongste nuus oor belangrike sake soos landbouproduksietoestande en biosekuriteit gekommunikeer word.

Publikasies

Graan SA produseer *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 oliesaadbedryf gebruik.

Benewens die tydskrif publiseer Graan SA ook *Pula Imvula* – 'n maandelikse publikasie wat in sewe tale vertaal word en op ontwikkelende en nuwe era- kommersiële graanprodusente gemik is. Graan SA publiseer ook die jaarlikse *Graangids*, wat nuttige kontakte en artikels oor saad, werktuie, bemesting, geïntegreerde plaagbeheer, lewende hawe, geld en finansiële dienste en – laaste maar nie die minste nie – inligting oor Graan SA bevat, asook belangrike kontakte en 'n bygewerkte kalender vir die komende jaar.

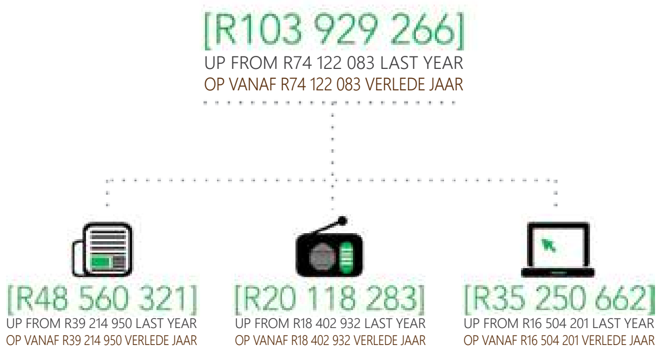
MEDIASKAKELING

Die mediagemeenskap bly een van die organisasie se sleutelbelanghebbendes, aangesien hulle 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 gebruik om beter toeganklikheid en groter aktiwiteit van die organisasie se strategiese fokusareas te verseker. Persvrystellings wat uitgereik is, is ten volle benut, en het tot talle gewone onderhoude op die druk-, uitsaai- en aanlynplatforms gelei, asook tot algemene nuusdekking wat op 'n advertensiewaarde-ekwivalent (AVE) van R103 929 266 gewaardeer word – teenoor R74 122 083 in die vorige verslagtydperk. Hierdie dekking behels 'n AVE-waarde van R48 560 321 (24% hoër) vir drukmediadekking, 'n AVE-waarde van R20 118 283 (9% hoër) vir uitsaaidekking, en R35 250 662 (114% hoër) vir aanlynmediadekking. Die gevolglike syfers is die ekwivalent van wat 'n adverteerder 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 ontvang word.

Regdeur die verslagdoeningstydperk dui Graan SA se mediadekking van maand tot maand die meeste druk-, uitsaai- en aanlyndekking aan wat regdeur die maande van Maart 2018, Mei 2018 en Augustus tot September 2018 gegenereer is.

Mediadekking in Oktober 2017 is deur die nuwe koringteelplatform en die gala-toekenningsaankondigings oorheers. Die nuwe jaar het afgeskop met aanmeldings van die herfskommandowurm, die aankondiging dat Graan SA NAMPO Kaap toe neem, en die droogtetoestande wat die Suid-Afrikaanse mieliegordel raak. Die biosekuriteittendens is voortgesit in Februarie, wat heeltemal oorheers is deur

1 Grain SA's advertising value equivalent spend
Graan SA se advertensiewaarde-ekwivalent spandeer



fall armyworm's possible spread to all provinces, as well as the then reduced summer grain plantings.

Media coverage in March was generated as a result of Congress, the land reform motion and the generous donation of water to the Moorreesburg district. Further media coverage focused on wheat imports and the Western Cape drought.

Land expropriation and its effect on food production continued to dominate the media through April coupled with the downward revision of the wheat import tariff. May's media coverage was led by the NAMPO Harvest Day, and closely followed by the announcement of the long awaited publishing of the statutory measure for the reporting of maize imports and exports.

The months of June to September were dominated by the AB InBev deal, the announcement of the soybean breeding and technology levy, the Bela-Bela land summit, NAMPO Cape and the parliamentary submissions on land reform plans. See **Graph 1** below.

Further, Grain SA's estimated circulation on all print, broadcast and online news platforms accumulated to a combined 936 million over the twelve-month period with the majority of coverage generated by Grain SA Executives quoted in the media. See **Graph 2** below.

In the local press, Grain SA's publication word cloud changed dramatically over the reporting period with a real focus on land, compared to the previous period. Relevance of topics relating to South African

die moontlike verspreiding van die herfskommandowurm na al die provinsies, en ook deur die kleiner somergraanaanplantings.

Mediadekking in Maart is deur die Kongres, die grondhervormingmosie en die ruim skenking van water aan die Moorreesburg-distrik oorheers. Verdere dekking het op koringinvoere en die droogte in die Wes-Kaap gefokus.

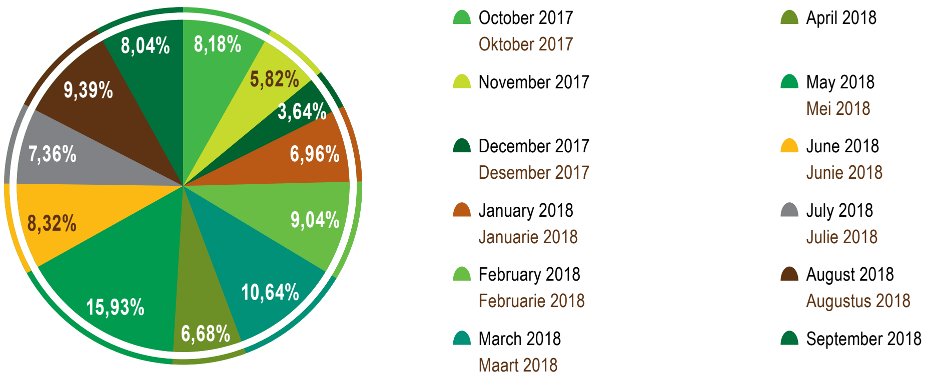
Grondonteiening en die uitwerking daarvan op voedselproduksie het die media regdeur April oorheers, saam met die afwaartse hersiening van die koringinvoertarief. Mei se mediadekking het hoofsaaklik gehandel oor die NAMPO Oesdag, met die aankondiging van die lang verwagte publikasie van die statutêre maatstaf vir die rapportering van mielie-invoere en uitvoere daarmee saam.

Junie tot September is deur die AB InBev-transaksie, die aankondiging van die sojaboon teling- en tegnologieheffing, die Bela-Belagrondberaad, NAMPO Kaap en die parlementêre voorleggings oor grondhervormingsplanne oorheers. Sien **Grafiek 1** hieronder.

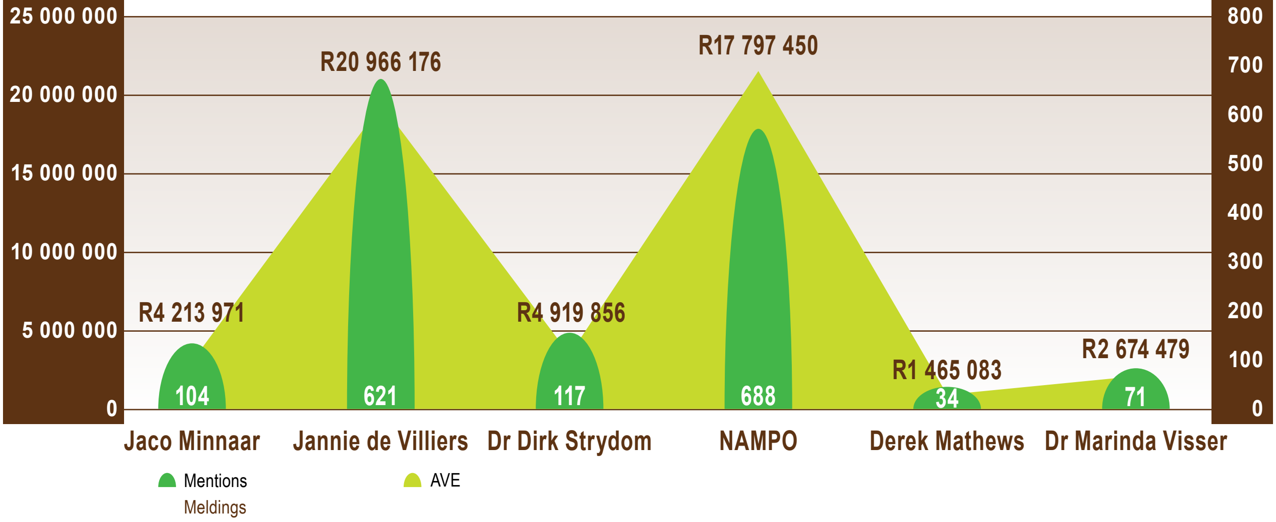
Graan SA se geraamde sirkulasie op alle druk-, uitsaai- en aanlynnuusplatforms het verder 'n gekombineerde 936 miljoen oor die twaalfmaande-tydperk beloop, met die meeste van die dekking wat gegenereer is deur Graan SA se uitvoerende beamptes wat in die media aangehaal is. Sien **Grafiek 2** hieronder.

In die plaaslike pers het Graan SA se publikasiewoordwolk dramaties verander oor die verslagdoeningstydperk vergeleke met die vorige

1 **Month-on-month media coverage**
Maand-tot-maand mediadekking



2 **Grain SA media coverage mentions by executives**
Meldings van Graan SA in die media deur uitvoerende beamptes



2 Grain SA's publication word cloud changed dramatically in the year under review
Graan SA se publikasiewoordwolk het in die verslagjaar dramaties verander

GRAIN SA WORD CLOUD 2016/2017
GRAAN SA WOORDWOLK 2016/2017

GRAIN SA WORD CLOUD 2017/2018
GRAAN SA WOORDWOLK 2017/2018

grain production remain consistent in the word cloud, indicating a distinct emphasis on topics and discussions relevant to the organisation's strategic focus areas.

Print and broadcast media

For the period under review, Grain SA's overall media coverage increased by 14%. The print media count slightly decreased by 36 (4%) clippings to 973. Broadcast media mentions increased by 270 (36%) to 1 030, and online media coverage increased by 270 (36%) articles to 1 030. The total combined media coverage for the reporting period increased to 2 792 from the previous year of 2 444.

Consumer magazines contributed to 37% of print media coverage, followed by daily newspapers, business-to-business magazines and Sunday newspapers with 21%, 14% and 12% respectively. Radio contributed to 56% of the broadcast media coverage – with paid radio stations ranking top at 41% – and television contributed the remaining 44%. Current affairs website types carried 40% of online news coverage, followed by industry and community websites with 32% and 16% respectively.

Individual results for print, broadcast and online media's Advertising Value Equivalency (AVE) has increased with 24%, 9% and 114% respectively compared to the previous reporting period with a combined total monetary AVE value of R103 929 266 million. Grain SA's AVE increased steadily over the past three reporting periods as illustrated in **Graph 4**.

tydperk, met 'n groot 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.

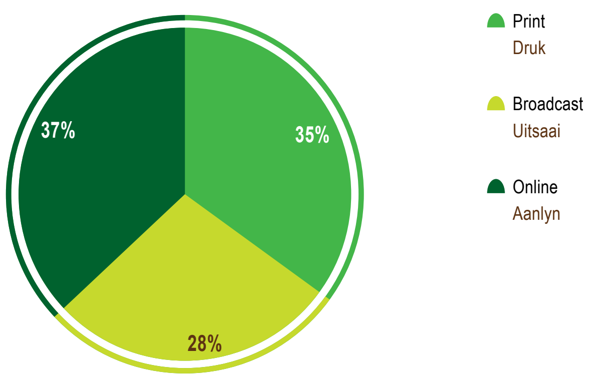
Druk- en uitsaaimedia

Graan SA se algehele mediadekking het vir die oorsigtydperk met 14% toegeneem. Die drukmediatelling het effens met 36 knipsels (4%) tot 973 afgeneem. Uitsaaimediadekking het met 270 meldings (36%) tot 1 030 toegeneem, en aanlyn-mediadekking het met 270 artikels (36%) tot 1 030 toegeneem. Die totale gekombineerde mediadekkingtelling vir die verslagtydperk het tot 2 792 toegeneem vanaf die vorige jaar se 2 444.

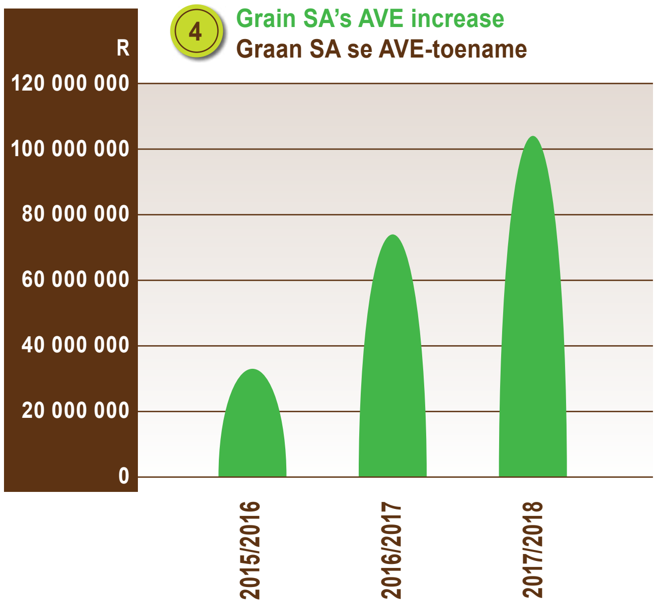
Verbruikerstydskrifte het tot 37% van die drukmediadekking bygedra, gevolg deur dagblaaie, besigheid-tot-besigheidtydskrifte en Sondagkoerante met 21%, 14% en 12% onderskeidelik. Radio-uitsendings het 56% van die uitsaaimediadekking behels, met kommersiële radiostasies wat boaan die lys was met 41%, en televisie wat die oorblywende 44% bygedra het. Aktuelesake-webwerwe het 40% van aanlyn-nuusdekking gedra, gevolg deur bedryfs- en gemeenskapswebwerwe met 32% en 16% onderskeidelik.

Individuele resultate vir druk-, uitsaai- en aanlynmedia se Advertensiewaarde-ekwivalensie (AVE) het met 24%, 9% en 114% onderskeidelik

3 Grain SA media coverage
Graan SA-mediadekking



4 Grain SA's AVE increase
Graan SA se AVE-toename



Social media

Social media is one of the fastest growing industries worldwide. When it comes to immediacy, news reporting, marketing, public relations and the art of doing business, social media tops the list. It has evolved from a nice to have into a necessity. For this reason, Grain SA is constantly developing its social media platforms in order to raise awareness of its activities among all stakeholders, to educate, inform and engage the public and to get people talking.

Grain SA continued to strengthen its online platforms and utilised its social media communication channels fully. The digital media strategy, describing how Grain SA should communicate online, to whom and when was reassessed and amended as the year progressed. The strategy mainly focuses 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 service offering, and introduced new online communication platforms which ensured the organisation reached a broader audience. Grain SA is now active on four key platforms (Facebook, Twitter, Instagram and YouTube) with over 34 000 fans and followers across all platforms.

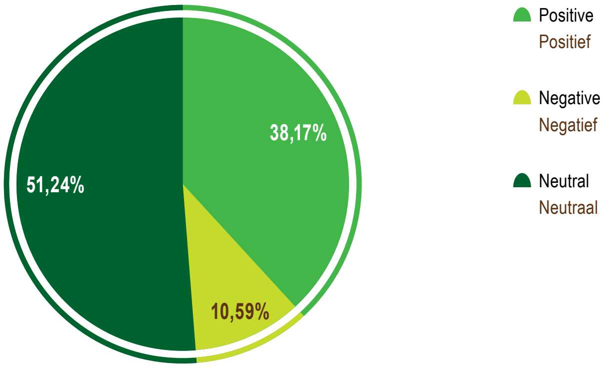
toegeneem vergeleke met die vorige verslagdoeningstydperk, met 'n totale geldelike AVE-waarde van R103 929 266 miljoen. Graan SA se AVE het die afgelope drie verslagdoeningstydperke bestendig gegroei, soos in **Grafiek 4** (op bladsy 33) getoon word.

Sosiale media

Sosiale media is een van die bedrywe wat wêreldwyd die vinnigste groei. Wanneer dit by onmiddellikheid, nuusverslae, bemarking, openbare betrekkinge en die kuns van sake doen kom, is sosiale media boaan die lys. Dit het van 'n lekkerte in 'n noodsaaklikheid verander. Om hierdie rede ontwikkel Graan SA voortdurend sy sosialemediaplatforms om alle belanghebbendes van sy aktiwiteite bewus te maak en die publiek op te voed, in te lig en te betrek, en mense aan die gesels te kry.

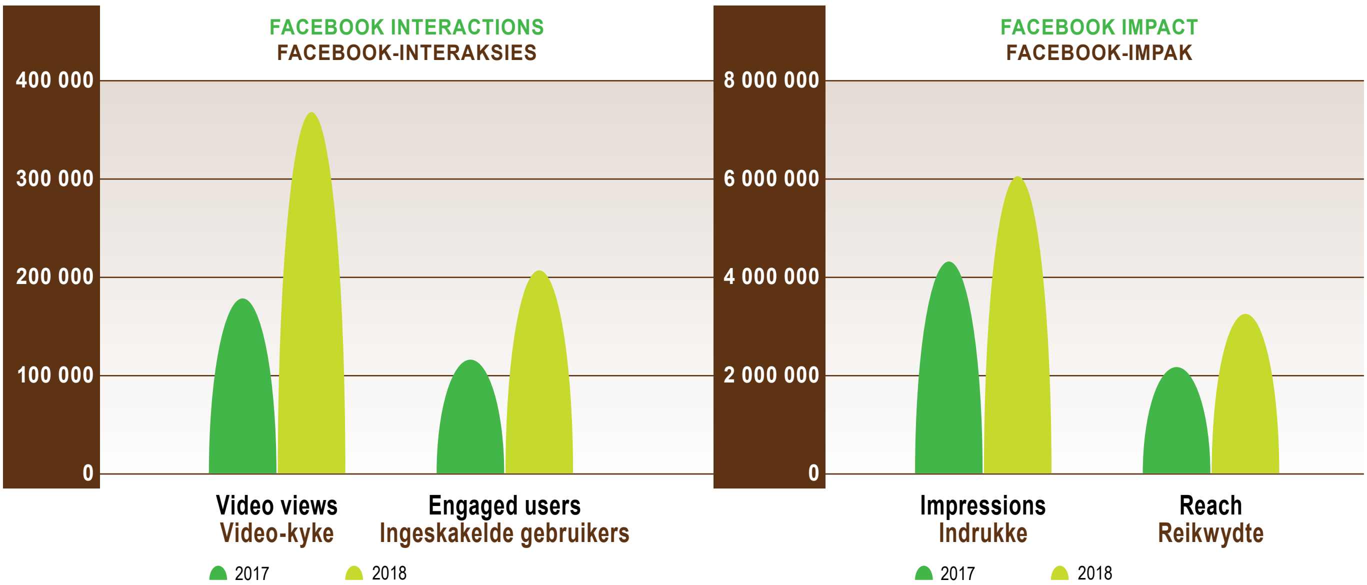
Graan SA het voortgegaan om sy aanlyn-platforms te versterk en het sy sosialemedia-kommunikasiekanale ten volle benut. Die sosialemediastrategie beskryf hoe, met wie en wanneer Graan SA aanlyn moet kommunikeer en is in die loop van die jaar hersien en gewysig. Die strategie fokus hoofsaaklik op inligtingoordrag, betrokkenheid, gemeenskapsbou, handelsmerkbewustheid en reputasiebestuur, opvoeding, en om 'n verreikende aanlyn-teenwoordigheid op te bou deur die deel van inhoud tussen ons teikengehoor en hulle netwerke te vergemaklik. Die doel is om groter bewustheid van Graan SA en sy diensaanbod te skep, en nuwe aanlyn-kommunikasieplatforms is geskep om te verseker dat die organisasie 'n wyer gehoor bereik. Graan SA is nou op vier platforms aktief (Facebook, Twitter, Instagram en YouTube), met meer as 34 000 aanhangers en volgelinge oor al die platforms.

5 Social sentiment
Sosiale sentiment



3 Grain SA social and digital media platforms
Graan SA se sosiale- en digitalemedia-platforms

6 The Grain SA Facebook page remains very popular
Die Graan SA Facebook-blad bly baie gewild



During the year under review, activity on the @GrainSA Twitter account increased substantially from 6 261 to 9 416. 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 utilised to disseminate daily market and fuel reports.

With the integration of the Grain SA social media and web platforms, cross sharing has been simplified. The Grain SA Facebook page remains the most popular platform, 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 have increased substantially.

EVENTS AND OCCASIONS

Grain SA once again 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 had a busy event calendar for the year under review.

NAMPO Harvest Day

A new record attendance figure achieved during NAMPO 2018 and the feedback from the exhibitors that they mainly did good business testify to the optimism of the agricultural sector despite all the uncertainties facing South African producers. Grain SA's 52nd NAMPO Harvest Day saw 82 817 visitors streaming through the gates from 15 to 18 May 2018. Having a choice of 746 exhibitors, each visitor fully enjoyed the family atmosphere and farm hospitality that are so unique to the Harvest Day. The private airstrip at NAMPO Park handled 361 aeroplanes and helicopters, ferrying a variety of visitors there, with ease.

NAMPO 2018 offered a diversified exhibition with a variety of new technology, products and services on one site. Grain producers could make comparisons and informed decisions with a view to sustainable productivity and profitability. Grain SA focuses on a better, rather than bigger NAMPO Harvest Day and continuously pursues and promotes this agricultural family experience. NAMPO received various visitors from Africa, neighbouring countries and local politicians together with an ever increasing international pavilion. The Harvest Day was well publicised bringing urban South Africa ever closer to agriculture. The Grain SA and NAMPO Experience Centre showcased the organisation's activities and focus areas and the NAMPO merchandise sales, which moved to the NAMPO Hall, proved extremely successful.

Grain SA once again hosted its annual learner programme for the third year running, with a stern commitment to learner development in the fields of social media marketing and communication for future growth and empowerment. Learners from the NAMPO Combined Agricultural School in Bothaville, had the opportunity to attend a digital media short course and, at the same time, work as interns at the NAMPO Harvest Day, in order to both expand and apply their newly acquired knowledge. 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 inaugural NAMPO Cape was hosted from 12 to 14 September 2018 in co-operation with the Bredasdorp Park NPC in Bredasdorp. 16 245 visitors attended this prestigious event over the three days. Taking the best of what NAMPO has to offer up north, Grain SA presented a showcase like no other in the south with 306 exhibitors. The ever popular Nation in Conversation forum, an integral part of NAMPO, set up a studio focused on insightful conversations and topics for the producer and the agricultural challenges of the day.

In die oorsigjaar het aktiwiteit op die @GrainSA Twitter-rekening aansienlik vanaf 6 261 tot 9 416 toegeneem. Benewens twiets tydens alle groot Graan SA-geleenthede soos Kongres, NAMPO, die Feesdag en die Graanprodusent van die Jaar, word die rekening ook gebruik om daaglikse markverslae en brandstofverslae te versprei.

Met die integrasie van Graan SA se sosialemedia- en webplatform is oorkruisdeling vereenvoudig. Die Graan SA Facebook-blad bly die gewildste platform en lede bly op 'n daaglikse grondslag met die organisasie en ander sosialemedialede in verbinding. Interaksie met gemeenskapslede sowel as die impak daarvan het wesenlik toegeneem.

GEBEURE EN GELEENTHEDE

Graan SA het weer eens verskeie gebeurtenisse aangebied en die geleentheid gebied om met die media, regeringsverteenwoordigers, 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 vennootkappe met bestaande projekte gesluit.

NAMPO Oesdag

'n Nuwe rekordbywoningsyfer tydens NAMPO 2018 en die terugvoer van die uitstallers dat hulle oor die algemeen goeie sake gedoen het, getuig van die optimisme van die landbousektor, ten spyte van al die onsekerhede wat Suid-Afrikaanse produsente in die gesig staar. Tydens Graan SA se 52ste NAMPO Oesdag vanaf 15 tot 18 Mei 2018 het 82 817 besoekers deur die hekke gestroom. Met 'n keuse uit 746 uitstallers kon elke besoeker die familie-atmosfeer en plaasgasvryheid wat so eiesoortig is aan die Oesdag ten volle geniet. Die privaat landingstrook by NAMPO Park het met gemak 361 vliegtuie en helikopters hanteer wat besoekers heen en weer karwei het.

NAMPO 2018 het 'n gediversifiseerde uitstalling met 'n verskeidenheid nuwe tegnologieë, produkte en dienste op een terrein aangebied. Graanprodusente kon vergelykings tref en ingeligte besluite neem met die oog op volhoubare produktiwiteit en winsgewendheid. Graan SA fokus op 'n beter eerder as 'n groter NAMPO Oesdag en bevorder en streef hierdie landboufamilie-ervaring deurlopend na. NAMPO het verskeie besoekers uit Afrika, buurlande en plaaslike politici getrek, en die internasionale paviljoen groei steeds. Die Oesdag het heelwat publisiteit gekry en bring stedelike Suid-Afrika steeds nader aan landbou. Die Graan SA en NAMPO Belewenissentrum het die organisasie se aktiwiteite en fokusareas bekend gestel en die NAMPO-handelswareverkope, wat na die NAMPO-saal verskuif is, was uiters suksesvol.

Graan SA het weer vir die derde agtereenvolgende jaar sy jaarlikse leerderprogram aangebied, met 'n sterk verbintenis tot leerderontwikkeling op die gebiede van sosialemediabemarking en kommunikasie vir toekomstige groei en bemagtiging. Leerders van die NAMPO Combined Agricultural School op Bothaville het die geleentheid gehad om 'n digitalemedia-kortkursus by te woon en terselfdertyd as interns by die NAMPO Oesdag te werk sodat hulle hul nuwe kennis kon uitbrei en toepas. Die doel van die kursus en daaropvolgende internskap was om die leerders te leer om sosiale media doeltreffend te gebruik as 'n manier om in die plaaslike gemeenskappe 'n bietjie ekstra sakgeld te verdien.

NAMPO Kaap

Die eerste NAMPO Kaap is vanaf 12 tot 14 September 2018 in samewerking met die Bredasdorp Park NPC op Bredasdorp aangebied. 16 245 besoekers het hierdie gesogte geleentheid oor die drie dae bygewoon. Met behulp van die beste wat NAMPO in die noorde kan aanbied, het Graan SA 'n uitstalling soos geen ander in die suide nie met 306 uitstallers aangebied. Die immer gewilde Nasie in Gesprekforum, 'n geïntegreerde deel van NAMPO, het 'n ateljee opgestel wat op insiggewende gesprekke en onderwerpe vir die produsent en die landbou-uitdagings van die dag gefokus het.

With the commitment of the agri-businesses as well as all the major tractor and implement manufacturers, NAMPO Cape 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. The popular women's programme was also taken down south with food demonstrations, décor, inspiration and many product exhibitions geared towards the ladies, which included clothing, jewellery, décor- and hand-made items. NAMPO Cape showcased a large and dedicated livestock component, with a show ring occupied by the Merino Sheep breeding society, the Jersey Bull breeding society and the Youth Show. Sheep shearing demonstrations and livestock exhibitions were presented together with glorious flower displays and 4x4 demonstrations.

Gala awards

Grain SA celebrated the successes of its grain producers during two prestigious and jubilant celebratory events, held at NAMPO Park and in Midrand on 26 September and 12 October 2018 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 emerging 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 subsistence category honours farmers planting 0 to 10 ha. The smallholder category honours farmers planting more than 10 ha, but harvesting less than 250 tons. The potential commercial category, a new category introduced last year, honours farmers with access to more than 100 hectares of arable land, but currently not able to use all the available land, yet they are in a position to become 250 ton new era commercial producers. And lastly, the new era commercial category, honours farmers harvesting commercial yields. Since its inception in 2009, this event has been a highlight on the Grain SA calendar, and fondly referred to as the 'Harvest of Farmers'. The 2018 Day of Celebration was testimony to the investment of the organisation in farmer development over the past 16 years whilst affording the opportunity to celebrate farmer development, recognise excellence in the field, and above all, acknowledge transformation in grain production.

Grain Producer of the Year

Celebrating the cream of the crop at its annual gala awards evening, this event honoured the country's top grain producers, commemorating the 19th year of this accolade. It was attended by the Deputy Minister for Agriculture, Forestry and Fisheries, Mr Sifiso Buthelezi, together with senior governmental officials, representatives of the various agricultural trusts, organised agriculture as well as captains of industry.

The Grain Producer of the Year awards gives recognition to grain producers who 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. The judges were once again faced with a difficult task as all the finalists proved to be exceptional producers with diverse management styles. The Grain Producer of the Year gives recognition to 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.

2018 Gala Awards winners

- **Grain SA/Syngenta Grain Producer of the Year**
  Johan and Dirkie van As (Van As Brothers) from Swellendam, Western Cape

Met die verbintenis van die landboubesighede sowel as al die groot trekker- en implementvervaardigers het NAMPO Kaap die jongste tegnologie ten toon gestel in uitstallings van uitnemende gehalte. Niewinsgewende organisasies, insluitend skole en kerke, het die kos- en verversingstalletjies volgens NAMPO-tradisie tot voordeel van die plaaslike OSW's bedryf. Die gewilde vroueprogram is ook na die suide geneem met kosdemonstrasies, dekor, inspirasie en talle produkuitstallings wat op die dames gemik is, byvoorbeeld klere, juwele, dekor en handgemaakte items. NAMPO Kaap het 'n groot en toegewyde lewendehawekomponent gehad, met 'n skouring wat deur die Merino-skaaptelersvereniging, die Jersey-bultelersvereniging en die Jeugskou beset is. Skaapskeerdemonstrasies en lewendehawe-uitstallings is saam met wonderlike blomuitstallings en 4x4-demonstrasies aangebied.

Galatoekennings

Graan SA het die suksesse van sy graanprodusente tydens twee prestigegeleenthede op 26 September en 12 Oktober 2018 by NAMPO Park en in Midrand onderskeidelik gevier. Hierdie gebeurtenisse, wat deur 'n wye verskeidenheid belanghebbendes en opkomende graanprodusente bygewoon is, bied aan Graan SA die geleentheid om die ontwikkeling, groei en prestasies van sy opkomende en kommersiële graanprodusente te beloon.

Feesdag

Die Feesdag, wat uit vier kategorieë bestaan, vereer bestaans-, kleinskaalse, potensiële kommersiële en nuwe era- kommersiële boere en hulle bydrae tot die land se voedselsekerheid. Die bestaanskategorie fokus op boere wat 0 tot 10 ha aanplant. Die kleinskaalse kategorie vereer boere wat meer as 10 ha aanplant, maar minder as 250 ton oes. Die kategorie vir potensiële kommersiële boere is 'n nuwe een wat verlede jaar ingestel is vir boere met toegang tot meer as 100 hektaar bewerkbare grond, maar wat tans nie al die beskikbare grond kan gebruik nie, en tog in 'n posisie is om 250 ton nuwe era- kommersiële boere te word. En laastens is daar die nuwe era- kommersiële kategorie wat boere vereer wat kommersiële opbrengste oes. Sedert die instelling van die geleentheid in 2009 was dit 'n hoogtepunt op die Graan SA-kalender, en dit word liefderik die "Oes van Boere" genoem. Die 2018 Feesdag was 'n bewys van die belegging van die organisasie in landbou-ontwikkeling die afgelope 16 jaar, terwyl dit 'n geleentheid gebied het om landbou-ontwikkeling te vier, uitnemendheid in die veld te erken, en bowenal erkenning aan transformasie in graanproduksie te gee.

Graanprodusent van die Jaar

Ter viering van die room van die oes tydens 'n gala-toekenningsaand het hierdie geleentheid die land se topgraanprodusente vereer – die 19de keer dat dit plaasvind. Dit is bygewoon deur die Adjunkminister van Landbou, Bosbou en Visserye, mnr Sifiso Buthelezi, asook senior regeringsamptenare, verteenwoordigers van die onderskeie landbou-trusts, georganiseerde landbou en bedryfsleiers.

Die Graanprodusent van die Jaar-toekennings verleen erkenning aan graanprodusente wat met uitnemendheid boer. Die finaliste dien ook as uitstekende rolmodelle vir die jonger geslag produsente, terwyl die beeld van die graanprodusent verbeter word. Die beoordelaars het weer 'n uitdagende taak gehad, aangesien al die finaliste uitstekende produsente was, met uiteenlopende bestuurstyle. Die Graanprodusent van die Jaar-geleentheid bied erkenning aan suksesvolle graanprodusente wat hulle ondernemings met soveel passie en toewyding bestuur om 'n voorbeeld te stel en as inspirasie vir ander produsente te dien.

Wenners van die 2018-galatoekennings

- **Graan SA/Syngenta Graanprodusent van die Jaar**
  Johan en Dirkie van As (Van As Broers) van Swellendam, Wes-Kaap

- **Grain SA/Absa/John Deere Financial New Era Commercial Farmer of the Year**
  Jeremia Makhosini Mathebula from Amersfoort, Mpumalanga
- **Grain SA/Bayer Potential Commercial Farmer of the Year**
  Paulus Mosia from Edenville, Free State
- **Grain SA/Syngenta Smallholder Farmer of the Year**
  Nhlanhla Sicelo Mngadi from Estcourt, KwaZulu-Natal
- **Grain SA/Absa/John Deere Financial Subsistence Farmer of the Year**
  Jenette Thembi Shoba from Gert Sibande, Mpumalanga

Inspiration Award

In addition to these awards, Grain SA also utilised the opportunity to honour editor-in-chief of *Landbouweekblad*, Chris Burgess, with the **2018 Grain SA Inspiration Award**. The award was presented for the ground-breaking Bela-Bela Grondberaad hosted by *Landbouweekblad* and Agri SA in August 2018. The Inspiration Award was in appreciation of his leadership to establish a platform giving many remarkable South Africans the opportunity to tell their stories of empowerment and land reform successes, to the world.

Swartland Show 2018

The Swartland Show, which took place in Moorreesburg, Western Cape from 5 to 8 September, offered the ideal platform for Grain SA to interact with key stakeholders, which included international tour groups. In addition, Grain SA in co-operation with Nedbank and Kaap Agri, presented a breakfast seminar which addressed amongst others the declining profit margins in the grain industry.

Other events

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

SUPPORTING INITIATIVES

Marketing communication

In support of stakeholder and member engagement interventions, various branding material and corporate gifts were produced and distributed to targeted audiences. The majority of marketing communication elements are distributed as gifts with selected items used during promotional activities.

Being online

Grain SA continued to utilise its website to effectively communicate electronically with its members, stakeholders and the general public. The website content is updated continuously and articles and press releases pertaining to the organisation's activities, including its collaborations and partnerships with government, academia and public structures, are publicised. The Grain SA website is maintained daily with information reviewed regularly in support of communication strategies.

Measuring performance

In order to ensure the relevance of the public relations activities, monitoring and evaluation of all marketing communication activities and initiatives are ongoing. Grain SA monitors its media mentions as well as those of its Executives on a daily basis, providing the opportunity to respond where necessary, and to keep abreast of local and international news. The public relations function focuses on implementing an integrated approach to communication that ensures maximum penetration, awareness as well as an understanding of Grain SA's organisational imperatives.

- **Graan SA/Absa/John Deere Financial Nuwe Era Kommersiële Boer van die Jaar**
  Jeremia Makhosini Mathebula van Amersfoort, Mpumalanga
- **Graan SA/Bayer Potensiële Kommersiële Boer van die Jaar**
  Paulus Mosia van Edenville, Vrystaat
- **Graan SA/Syngenta Kleinskaalse Boer van die Jaar**
  Nhlanhla Sicelo Mngadi van Estcourt, KwaZulu-Natal
- **Graan SA/Absa/John Deere Financial Bestaansboer van die Jaar**
  Jenette Thembi Shoba van Gert Sibande, Mpumalanga

Inspirasietoekenning

Benewens hierdie toekennings het Graan SA ook van die geleentheid gebruik gemaak om die hoofredakteur van die *Landbouweekblad*, Chris Burgess, met die **2018 Graan SA Inspirasietoekenning** te vereer. Die toekenning is gemaak vir die baanbrekerswerk wat gedoen is met die Bela-Bela-grondberaad wat *Landbouweekblad* en Agri SA in Augustus 2018 aangebied het. Die Inspirasietoekenning was ter erkenning van sy leierskap om 'n platform te vestig waarop talle merkwaardige Suid-Afrikaners die geleentheid gehad het om hulle verhale van bemagtiging en grondhervormingsukses aan die wêreld te vertel.

Swartland Skou 2018

Die Swartland Skou, wat van 5 tot 8 September op Moorreesburg, Wes-Kaap aangebied is, het aan Graan SA die ideale platform gebied om met belangrike belanghebbendes, insluitend internasionale toergroepe, te netwerk. Graan SA, in samewerking met Nedbank en Kaap Agri, het ook 'n ontbytseminaar aangebied, waar onder andere die dalende winsmarges in die graanbedryf bespreek is.

Ander gebeure

Benewens hierdie gebeure het Graan SA ook aan die Boertjiefees, Senwes Toekomsfokus, ledegholfdae en verskeie inisiatiewe van Vroue in Landbou saam met die provinsiale vrouelandbou-unies deelgeneem.

ONDERSTEUNINGSINISIATIEWE

Bemarkingskommunikasie

Ter ondersteuning van belanghebbende- en ledebetrokkenheidsintervensies, is handelsmerkmateriaal en korporatiewe geskenke geproduseer en onder teikengehore uitgedeel. Die meeste van die bemarkingskommunikasie-elemente word as geskenke uitgedeel, met sekere items wat tydens promosie-aktiwiteite gebruik word.

Aanlynteenwoordigheid

Graan SA het voortgegaan om sy webwerf te gebruik om doeltreffend elektronies met sy lede, belanghebbendes en die algemene publiek te kommunikeer. Die inhoud van die webwerf word deurlopend bygewerk en artikels en persvrystellings oor die organisasie se aktiwiteite, insluitend sy samewerking en vennootskappe met die regering, die akademie en openbare strukture, word gepubliseer. Die Graan SA-webwerf word daagliks bygewerk, met inligting wat gereeld nagegaan word om seker te maak dat dit kommunikasiestrategieë ondersteun.

Meting van prestasie

Ten einde te verseker dat die werk wat ten opsigte van openbare betrekkinge gedoen word, relevant bly, word alle bemarkingskommunikasie-aktiwiteite en inisiatiewe deurlopend gemoniteer en geëvalueer. Graan SA moniteer sy mediavermelding sowel as dié van die lede van sy Hoofbestuur op 'n daaglikse basis, en dit verskaf die geleentheid om te reageer waar nodig en om op hoogte te bly van plaaslike en internasionale nuus. Die openbarebetrekkinge-funksie met sy fokus op die implementering van 'n geïntegreerde benadering tot kommunikasie verseker maksimum penetrasie, bewustheid, sowel as begrip van Graan SA se organisasiedoelwitte.

1 **Dr Marinda Visser**
MANAGER: GRAIN RESEARCH AND POLICY CENTRE
BESTUURDER: GRAANNAVORSING EN BELEIDSENTRUM

2 **Dr Hendrik Smith**
CONSERVATION AGRICULTURE FACILITATOR
BEWARINGSLANDBOUFASILITEERDER

3 **Petru Fourie**
RESEARCH CO-ORDINATOR AND PRODUCTION COST ANALYST
NAVORSINGSKOÖRDINEERDER EN PRODUKSIEKOSTE-ANALIS

4 **Miekie Human**
RESEARCH ASSISTANT
NAVORSINGSASSISTENT

5 **Jean Brikkels**
SECRETARY
SEKRETARESSE

STRATEGIC FOCUS AREAS

- Grain research co-ordination and policy
- Consortiums and multi-stakeholder partnerships
- Conservation agriculture

STRATEGIESE FOKUSAREAS

- Graannavorsingkoördinering en -beleid
- Konsortiums en multibelanghebbende-vennootskappe
- Bewaringslandbou

HIGHLIGHTS

- Progress was made with the development of high throughput phenotyping platform and was presented at the International Plant Phenotyping Symposium (IPPS) hosted by the Australian Plant Phenomics Facility in Adelaide, Australia.
- Grain SA's projects in collaboration with DST was presented at the first ever BIO Africa Convention held in Durban.
- A surveillance programme, initiated by Grain SA, to identify the occurrence and spread of fall armyworm (*Spodoptera frugiperda*) in South Africa.
- The Argentinian CA collaboration project was renewed for the 2017/2018 season.
- A greater urgency emerged to scale out CA to more producers, much faster, because of serious environmental threats and the dire economic situation of many grain producers.

HOOGTEPUNTE

- Vordering is met die ontwikkeling van 'n hoëdeurvloei-fenotiperingsplatform gemaak en dit is aangebied by die internasionale plantfenotiperingsimposium (International Plant Phenotyping Symposium, IPPS) wat deur die Australian Plant Phenomics Facility in Adelaide, Australië gehou is.
- Graan SA se projekte in samewerking met DWT is aangebied by die eerste BIO Afrika-konvensie ooit, wat in Durban gehou is.
- 'n Moniteringsprogram wat deur Graan SA geïnisieer is om die voorkoms en verspreiding van die herfskommandowurm (*Spodoptera frugiperda*) in Suid-Afrika te identifiseer.
- Die Argentynse BL-samewerkingsprojek is vir die 2017/2018-seisoen hernu.
- As gevolg van ernstige omgewingsbedreigings en die swak ekonomiese situasie van talle graanprodusente is 'n groter dringendheid geïdentifiseer om BL baie vinniger onder meer produsente bekend te stel.

MAJOR PROGRESS IN RESEARCH FACILITATION

GROOT VORDERING MET NAVORSINGSFASILITERING

Consortiums and multi-stakeholder partnerships

Grain SA's main research priority focus areas are crop improvement, crop protection, biosecurity, climate change and conservation agriculture. Grain SA's Research and Policy Centre's primary objective is to establish research consortia that drive innovation to enhance the productivity, profitability and sustainability of South African grain and oilseed producers and benefit the industry and the wider community. Feedback and progress of the consortia are provided below.

CROP IMPROVEMENT: WHEAT BREEDING

South Africa's area planted to wheat decreased at an alarming rate over the last 30 years, and therefore the Department of Science and Technology (DST) and Grain SA committed themselves to the development of a platform to address this challenge as it impacts

Konsortiums en multibelanghebbende-vennootskappe

Graan SA se vernaamste prioriteitsfokusareas vir navorsing is gewasverbetering, gewasbeskerming, biosekuriteit, klimaatsverandering en bewaringslandbou. Graan SA se Graannavorsing en Beleidsentrum 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 wyer gemeenskap tot voordeel te strek. Terugvoer en vordering van die konsortiums word hieronder verskaf.

GEWASVERBETERING: KORINGTELING

Suid-Afrika se oppervlak wat met koring beplant is, het die afgelope 30 jaar teen 'n ontstellende tempo gekrimp, en die Departement van Wetenskap en Tegnologie (DWT) en Graan SA het hulleself derhalwe verbind tot die ontwikkeling van 'n platform om hierdie uitdaging uit die

national food security. The Wheat Breeding Platform was established in 2014 as a consortium consisting of both public and private partners. The platform ultimately seeks to assist South African wheat producers to increase their production through the development of germplasm with targeted yield improvement, through drought and heat tolerance. The main aim of the consortium is thus to improve wheat yields in South Africa.

Strategic public-private partnership

This platform is an initiative by government and industry and is part of the implementation of the South African Bio-economy Strategy of the DST. This initiative was implemented to ensure adequate research into and development of new high yielding cultivars capable of adapting to the changing local environment. Partners include DST, Winter Cereal Trust, Department of Agriculture, Forestry and Fisheries (DAFF), the Agricultural Research Council (ARC), Sensako, Pannar and Stellenbosch University.

The platform has been co-funded by industry over the past four years through the Winter Cereal Trust. The platform to date distributed a significant amount of germplasm to breeding programmes at the ARC, Sensako and Pannar. The breeding companies use this germplasm for further evaluation and/or use as crossing parents and inclusion in breeding programmes, for the development of new (high yielding and rust resistant) wheat cultivars for the South African wheat producer.

Impact

The wheat breeding platform provides a unique opportunity for policymakers, public research organisations and private seed companies to work together to address the challenges wheat producers are faced with. The collaboration effort within this platform from the different role-players ensures technological innovation to improve cultivar development. This is the fundamental response for a sustainable and vibrant local breeding platform to ensure national food security and less reliance on imports.

General remarks with regards to the project

- The project is in its fourth year.
- Main role-players include the DST, Stellenbosch University, ARC, Sensako and Pannar.
- The then Minister of Science and Technology, Naledi Pandor, together with representatives from the Western Cape Agricultural and national Department of Agriculture, Forestry and Fisheries (DAFF), officially launched a Wheat Breeding Platform on 31 October 2017 at the Welgevallen Experimental Farm of Stellenbosch University.
- Five postgraduate students are involved in the pre-breeding programme while eight new students joined the pre-breeding

weg te ruim, aangesien dit 'n impak op nasionale voedselsekerheid het. Die Koringtelingsplatform is in 2014 as 'n konsortium met openbare sowel as privaat vennote gestig. Die platform probeer om uiteindelik Suid-Afrikaanse koringprodusente te help om hulle produksie te verhoog deur 'n kiemplasma met geteikende opbrengsverbetering op grond van droogte- en hitteverdraagsaamheid te ontwikkel. Die hoofdoelwit van die konsortium is dus om koringopbrengste in Suid-Afrika te verbeter.

Strategiese vennootskap tussen die openbare en privaat sektor

Hierdie platform is 'n inisiatief deur die regering en die bedryf en is deel van die implementering van die Suid-Afrikaanse Bio-ekonomiestrategie van die DWT. Hierdie inisiatief is geïmplementeer om te verseker dat voldoende navorsing gedoen word oor en nuwe hoë-opbrengskultivars ontwikkel word wat by die veranderende plaaslike omgewing aanpas. Vennote sluit in die DWT, Wintergraantrust, Departement van Landbou, Bosbou en Visserye (DLBV), die Landbounavorsingsraad (LNR), Sensako, Pannar en Universiteit Stellenbosch.

Die platform is die afgelope vier jaar namens die bedryf deur die Wintergraantrust medebefonds. Tot op hede het die platform 'n beduidende hoeveelheid kiemplasma aan telingsprogramme by die LNR, Sensako en Pannar verskaf. Die telingsmaatskappye gebruik hierdie kiemplasma vir verdere evaluering en/of as kruisouers en insluiting by telingsprogramme vir die ontwikkeling van nuwe (hoë-opbrengs- en roesweerstandige) koringkultivars vir die Suid-Afrikaanse koringprodusent.

Impak

Die koringtelingsprogram verskaf 'n unieke geleentheid vir beleidmakers, openbare navorsingsorganisasies en privaat saadmaatskappye om saam te werk om die uitdagings te hanteer waarvoor koringprodusente te staan kom. Die samewerkingspogings van die onderskeie rolspelers op hierdie platform verseker tegnologiese innovering om kultivarontwikkeling te verbeter. Dit is die grondliggende reaksie op 'n volhoubare en lewendige plaaslike telingsprogram om nasionale voedselsekerheid en minder vertroue op invoere te verseker.

Algemene opmerkings ten opsigte van die projek

- Die projek is in sy vierde jaar.
- Die vernaamste rolspelers sluit in die DWT, Universiteit Stellenbosch, LNR, Sensako en Pannar.
- Die destydse Minister van Wetenskap en Tegnologie, Naledi Pandor, tesame met verteenwoordigers van die Wes-Kaapse Departement Landbou en die nasionale Departement van Landbou, Bosbou en Visserye (DLBV) het op 31 Oktober 2017 by die Welgevallen Proefplaas van die Universiteit Stellenbosch amptelik 'n koringtelingsplatform bekend gestel.
- Vyf nagraadse studente is betrokke by die voortelingsprogram, terwyl agt nuwe studente in 2018 by die voortelingsprogram van die Universiteit Stellenbosch aangesluit het. Daar was dus in 2018 13 studente: Een postdoktorale, een PhD-, vyf MSc-, twee BScHons en vier vierdejaar-BSc Agric-studente.

FARMERS ATTENDING A FARMERS DAY AT SPRINGVALLEY ON 21 FEBRUARY 2018.

PRODUSENTE WAT OP 21 FEBRUARIE 2018 'N PRODUSENTEDAG BY SPRINGVALLEY BYGEWOON HET.

THERE WAS HUGE INTEREST IN THE TRIALS AT THE CA CONFERENCE AT REITZ ON 19 - 20 MARCH 2018.

DAAR WAS GROOT BELANGSTELLING IN DIE PROEWE BY DIE BL-KONFERENSIE OP REITZ OP 19 - 20 MAART 2018.

JAY FUHRER (USDA) AT A SOIL PROFILE IN A DEMONSTRATION TRIAL AT REITZ.

JAY FUHRER (USDA) BY 'N PROFIELGAT IN 'N DEMONSTRASIEPROEF BY REITZ.

programme at Stellenbosch University during 2018. 13 students during 2018: One post-doctoral; one PhD; five MSc; two BScHons; four 4th year BSc Agric students.

- Lezaan Hess was appointed as a junior lecturer and plant breeder beginning 1 January 2019. Ms Hess will be joining CIMMYT for three months during 2019 for further training.
- During a recent survey among the recipient breeding programmes, it was concluded that on average about 40 lines are annually selected by breeders for use in their respective breeding programmes. It is estimated to be higher than the average for selections from the International Maize and Wheat Improvement Centre (CIMMYT)'s nurseries.
- The optimisation of the high throughput phenotyping platform utilising drones made huge progress in the development of a management pipeline for the image-related data. A part of this development was presented at the International Plant Phenotyping Symposium (IPPS) hosted by the Australian Plant Phenomics Facility in Adelaide, Australia (2 - 5 October 2018). The title of the presentation was Developing an In-house Pipeline for Aerial Image Analysis.
- Attended the BIO Africa Convention in Durban (27 - 29 August 2018) where DST invited Grain SA to exhibit all its research projects

- Lezaan Hess is vanaf 1 Januarie 2019 as 'n junior lektor en plantteler aangestel. Me Hess sal in 2019 vir drie maande lank by CIMMYT aansluit vir verdere opleiding.
- Tydens 'n onlangse opname onder die ontvangertelingsprogramme is die gevolgtrekking gemaak dat 'n gemiddelde van ongeveer 40 lyne elke jaar deur telers gekies word om in hulle onderskeie telingsprogramme te gebruik. Daar word geraam dat dit hoër as die gemiddelde is vir keuses uit die internasionale Mielie- en Koringverbeteringsentrum (CIMMYT) se kwekerye.
- Die optimalisering van die hoëdeurvloei-fenotiperingsplatform se benutting van hommeltuie het groot vordering gemaak met die ontwikkeling van 'n bestuurspyplyn vir die beeldverwante data. 'n Deel van hierdie ontwikkeling is aangebied by die internasionale plantfenotiperingsimposium (International Plant Phenotyping Symposium, IPPS) wat deur die Australian Plant Phenomics Facility in Adelaide, Australië gehou is (2 - 5 Oktober 2018). Die titel van die aanbieding was Developing an In-house Pipeline for Aerial Image Analysis.
- Die BIO Afrika-konvensie in Durban (27 - 29 Augustus 2018) is bygewoon, en die DWT het Graan SA genooi om al sy navorsingsprojekte in samewerking met hulle uit te stal. Die projekleier (Universiteit Stellenbosch) van die koringtelingsplatform het tydens die konferensie 'n aanbieding gemaak.

GEWASBESKERMINGSKONSORTIUM

Die Gewasbeskermingskonsortium fokus op die monitering, voorkoming en/of bestuur van die algemeenste en vernietigendste

A VIEW INSIDE THE TENT AT THE CA CONFERENCE IN REITZ.

'N BLIK VAN DIE BINNEKANT VAN DIE MARKIESTENT TYDENS DIE BL-KONFERENSIE OP REITZ.

PANEL DISCUSSIONS AT THE END OF THE CA CONFERENCE AT REITZ.

PANEELBESPREKINGS AAN DIE EINDE VAN DIE BL-KONFERENSIE OP REITZ.

in collaboration with them. A presentation was made by the Project Leader (Stellenbosch University) of the Wheat breeding Platform during this conference.

CROP PROTECTION CONSORTIUM

The Crop Protection Consortium is focused on monitoring, preventing and/or managing the most prevalent and destructive diseases of cereals and oilseed crops. As part of this consortium, soil borne diseases and the impact of farming practices on soil borne diseases are being studied. We are only beginning to understand and identify the plethora of microbial species that occur in our soils. Optimal management of agricultural soils to prevent diseases while sustaining optimal growth conditions is even less understood. As Sclerotinia rot is a soil borne disease which caused severe soybean and sunflower yield losses over the past few years, a research network was established to address how current disease management practices can be adapted for South African conditions.

South African Sclerotinia Research Network

In 2017, sunflower and soybean producers experienced major crop losses due to infection by *Sclerotinia sclerotiorum*, the fungus causing white rot. This was not the first epidemic and certainly will not be the last as there are currently no sources of resistance to protect plants against this pathogen and inoculum remains viable in the soil for up to ten years. In an effort to minimise Sclerotinia yield losses, researchers from the University of the Free State joined forces with Grain SA to find practical solutions to the Sclerotinia epidemics of soybean and sunflower.

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 created to provide a platform for dialogue to take place between researchers, industry and producers. In addition, SASRN researchers will carry out research projects focused on modelling of the disease epidemiology and identifying potential sources of resistance through molecular screening methods. Results from these studies will contribute to effective management strategies for this pathogen.

Contribution to agriculture

The Crop Protection Consortium brings together researchers with their own skills and expertise to solve problems experienced by producers of summer grains and oilseed crops, and ultimately, increase food security for South Africa. The producer-focused research projects aim to not only find solutions, but also to open up communication channels between government, researchers, industry and producers for quicker identification of problems and dissemination of results. In the long term, the Crop Protection Consortium allows government, industry and academia to jointly work toward assisting producers in obtaining

siektes in graan- en oliesaadgewasse. As deel van hierdie konsortium word grondgedraagde siektes en die impak van boerderypraktyke op grondgedraagde siektes bestudeer. Ons begin nou eers om die magdom mikrobiese spesies te verstaan en identifiseer wat in ons grond voorkom. Ons het selfs minder begrip van optimale bestuur van landbougrond om siektes te voorkom terwyl optimale groeitoestande volgehou word. Aangesien Sclerotinia 'n grondgedraagde siekte is wat die afgelope paar jaar ernstige sojaboon- en sonneblomopbrengsverliese veroorsaak het, is 'n navorsingsnetwerk gevestig om te bepaal hoe huidige siektebestuurspraktyke vir Suid-Afrikaanse toestande aangepas kan word.

Suid-Afrikaanse Sclerotinia-navorsingsnetwerk

In 2017 het sonneblom- en sojaboonprodusente geweldige gewasverliese ervaar as gevolg van besmetting deur *Sclerotinia sclerotiorum*, die swam wat witvrot veroorsaak. Dit was nie die eerste epidemie nie en sal beslis ook nie die laaste een wees nie, aangesien daar tans geen bronne van weerstand is om plante teen hierdie patogeen te beskerm nie, en inokulum bly tot tien jaar lank lewensvatbaar in die grond. In 'n poging om opbrengsverliese as gevolg van Sclerotinia te beperk, het navorsers van die Universiteit van die Vrystaat met Graan SA kragte saamgesnoer om praktiese oplossings vir die Sclerotinia-epidemies in sojabone en sonneblomme te kry.

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. SASRN-navorsers sal ook navorsingsprojekte uitvoer wat op die modellering van die siekte se epidemiologie en die identifisering van potensiële bronne van weerstand deur middel van molekulêre siftingsmetodes fokus. Resultate van hierdie studies sal tot doeltreffende bestuurstrategieë vir hierdie patogeen bydra.

Bydrae tot landbou

Die Gewasbeskermingskonsortium bring navorsers met hulle eie vaardighede en kundigheid byeen om probleme op te los wat die produsente van somergraan- en oliesaadgewasse ervaar, en uiteindelik voedselsekerheid vir Suid-Afrika te verbeter. Die produsent-gefokusde navorsingsprojekte is nie net daarop gemik om oplossings te vind nie, maar ook om kommunikasiekanale tussen die regering, navorsers, die bedryf en produsente oop te hou vir vinniger identifikasie van probleme en verspreiding van resultate. Op die lang termyn stel die Gewasbeskermingskonsortium die regering, die bedryf en akademie in staat om saam te werk om produsente te help om beter grondgesondheid, kleiner voorkoms van siektes, groter gewasopbrengste en – uiteindelik – groter voedselsekerheid vir Suid-Afrika te bewerkstellig.

Algemene opmerkings ten opsigte van die projek

- Die vernaamste rolspelers sluit in die DWT, Noordwes-Universiteit, Universiteit van die Vrystaat, die LNR-PGB en LNR-GG.

improved soil health, decreased disease incidence, higher crop yields and ultimately, increase food security for South Africa.

General remarks with regards to the project

- Main role-players include DST, North-West University, University of the Free State and the ARC-PHP and ARC-GC.
- Establishment of a SASRN.
  - Good collaboration with input companies, particularly the chemical industry.
  - First season (2018/2019) that Sclerotinia trials will be planted after the establishment of SASRN.

BIOSECURITY: EARLY-WARNING SYSTEM FOR ARMYWORMS IN SOUTH AFRICA

The Southern African region, having just experienced one of the worst droughts in over thirty years, was also hit by the well documented fall armyworm invasion. This brought biosecurity to the forefront as entry of invasive pests into South Africa threatens regional and international trade as well as national food security.

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 has been detected at significantly higher incidences in Limpopo which underlines that this region needs urgent intervention. Furthermore, distribution maps of fall armyworm has revealed possible routes of spread for this armyworm and also identified fall armyworm-free regions in South Africa.

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

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 fall armyworm 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 threaten national food security.

CLIMATE RESILIENCE: INCREASING CLIMATE RESILIENCE

Predictions of how climatic conditions will change in the coming years are 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 maize will be resilient to climate change in Southern African maize-based systems – specifically for smallholder producers – the Climate Change Consortium were founded. Researchers from Sensako, Rhodes University (RU), Stellenbosch University, the University of Fort Hare (UFH) and CIMMYT 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 CO_2 facility at RU.

- Stigting van SASRN.
  - Goeie samewerking met insetmaatskappye, veral die chemiese bedryf.
  - Eerste seisoen (2018/2019) ná die stigting van die SASRN dat Sclerotinia-proewe geplant sal word.

BIOSEKURITEIT: VROEËWAARSKUWINGSTELSEL VIR KOMMANDOWURMS IN SUID-AFRIKA

Die Suider-Afrikaanse streek het pas een van die ergste droogtes in 30 jaar beleef, en is toe ook deur die goed gedokumenteerde herfskommandowurm-inval getref. Dit het biosekuriteit op die voorgrond geplaas, aangesien die inval van plae in Suid-Afrika streeks- sowel as internasionale handel en ook nasionale voedselsekerheid bedreig.

’n Moniteringsprogram 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 hanteer. Tot dusver is die herfskommandowurm met ’n beduidend groter voorkoms in Limpopo waargeneem, wat beklemtoon dat hierdie streek dringende tussenkoms benodig. Verspreidingskaarte van die herfskommandowurm het moontlike verspreidingsroetes vir hierdie kommandowurm getoon, en ook die herfskommandowurm-vrye streke in Suid-Afrika geïdentifiseer.

Dit is interessant dat ’n baie groot getal valskommandowurms (*Leucania loreyi*) in 90% van die valstrikke vir herfskommandowurms gevang is. Hierdie moniteringsdata 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 en die bedryf indringerplae en patogene se binnekoms in Suid-Afrika moet identifiseer en bestuur, aangesien gewasverliese nasionale voedselsekerheid bedreig.

KLIMAATAANPASBAARHEID: VERBETER KLIMAATAANPASBAARHEID

Voorspellings van hoe klimaatstoestande in die jare vorentoe sal verander, word toenemend gemaak. Hierdie voorspellings sal egter betekenisloos wees as strategieë om hierdie toestande aan te pas, nie in plek is nie. Ten einde te verseker dat mielies in Suider-Afrikaanse mieliegebaseerde stelsels – spesifiek dié van kleinskaalse produsente – by klimaatsverandering kan aanpas, is die Klimaatsveranderingkonsortium gestig. Navorsers van Sensako, Rhodes Universiteit (RU), Universiteit Stellenbosch, die Universiteit van Fort Hare (UFH) en CIMMYT werk saam om klimaataanpasbare mielielyne met groter voedingswaarde en beter siekteweerstandigheid te teel. Hierdie lyne word dan by die ultramoderne verhoogde-CO_2-fasiliteit by RU aan die hand van voorspelde toekomstige toestande geëvalueer.

Expanding maize-genetic variability for increased tolerance to 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 response under future climatic conditions

The elevated CO_2 facility at RU enables testing of maize lines under future climatic conditions – i.e. increased CO_2 and increased temperatures. Thus far it seems that elevated CO_2 increases a plant's drought tolerance. However, this comes at a cost to the plant as yield is reduced. In future, climate resilient lines bred thus far will be tested at this facility to ensure hybrids 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 planting, 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. Grain SA is currently in the process of launching a project to predict climate risks for important (and overlooked) maize production areas in South Africa.

Conservation agriculture

Grain SA, financially supported by the Maize Trust and the Winter Cereal Trust, established a Conservation Agriculture Farmer Innovation

Uitbreiding van mielies se genetiese diversiteit vir hoër verdraagsaamheid van 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 keuring 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 se reaksie onder toekomstige klimaatstoestande

Die verhoogde-CO_2-fasiliteit by RU maak dit moontlik om mielielyne onder toekomstige klimaatstoestande te toets, met ander woorde verhoogde CO_2 en hoër temperature. Tot dusver blyk dit dat verhoogde CO_2 'n plant se droogteverdraagsaamheid verhoog. Dit het egter weer 'n nadeel vir die plant, aangesien opbrengs verminder word. Klimaataanpasbare lyne wat tot dusver geteel is, sal in die toekoms by hierdie fasiliteit getoets word om seker te maak dat hibriede voorspelde klimaatstoestande kan weerstaan.

Klimaatsrisiko

Klimaatsrisiko word omskryf as die risiko voortspruitend uit klimaatsverandering en wat natuurlike en menslike stelsels en streke aantas. Produsente kan hierdie risiko's bestuur deur ingeligte besluite oor beplanting, 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 belanghebbende-interaksie noodsaaklik. Graan SA is tans besig om 'n projek bekend te stel om klimaatsrisiko's vir belangrike (en miskende) mielieproduksiegebiede van Suid-Afrika te voorspel.

Bewaringslandbou

Graan SA, met die finansiële ondersteuning van die Mielie- en Wintergraantrust, het 'n Boere-innoveringsprogram vir

PRODUCERS LISTENING ATTENTIVELY AT THE TRIALS AT OTTOSDAL.

PRODUSENTE LUISTER AANDAGTIG BY DIE PROEWE OP OTTOSDAL.

SOME OF THE PRESENTERS AT THE 2018 OTTOSDAL CONSERVATION AGRICULTURE CONFERENCE.

VAN DIE SPREKERS BY DIE 2018 OTTOSDAL BEWARINGSLANDBOUKONFERENSIE.

Programme (CA-FIP) to address concerns about excessively high soil degradation rates, profitability and poverty in grain-producing areas.

PROGRESS AND MAJOR ACHIEVEMENTS

- The CA-FIP at Grain SA has successfully designed, implemented and managed various key strategic objectives and projects for CA, mostly funded by the Maize Trust and to a lesser extent by the Winter Cereal Trust. The CA-FIP has completed its fifth year (season) and significant momentum has already been built into the sixth season.
- The amount of CA related articles published has increased significantly, especially in *SA Graan/Grain* magazine. This is still seen as very relevant and important and will continue. Other relevant stakeholders, such as popular magazines (e.g. *Landbouweekblad* and *Farmers Weekly*) were engaged to accelerate this process. All the articles in *SA Graan/Grain* can be accessed through the Grain SA website.
- Awareness on CA will be continued and accelerated. Any relevant event of quality, such as the annual KwaZulu-Natal no-till conference and farmers days, are opportunities to promote CA, including the role of the Maize Trust and/or Grain SA. A number of successful awareness events were held in this period, especially the Ottosdal (13 - 14 March 2018) and the Reitz (19 - 20 March 2018) conferences (the latter jointly done with Riemland Study Group, *Landbouweekblad*, VKB and DeKalb Seed) and a number of farmers days in the KwaZulu-Natal and Eastern Cape smallholder study areas. A new awareness initiative, the development of a series of CA videos (Shepherds of the Soil), has been launched in November 2016. Videos are already available on the website and new videos have been finalised in 2018. Dr Smith was also a member of the organising committees of the National LandCare Conference (Bloemfontein, 25 - 27 September) and the second African Conservation Agriculture Conference (Johannesburg, 9 - 11 October 2018), where he made presentations on the results of the CA-FIP.
- The Argentinian collaboration is an important project for Grain SA. This agreement came to an end in July 2017; its extension has been signed with Argentinian counterparts, but details of trial implementation could not be finalised with Argentinean counterparts for the 2017/2018 season. However, several on-farm trials were established in the various study areas using the Argentinian system and a study tour was funded for two CA-FIP participants to Argentina during June 2018.
- Participation in national CA forums is seen as an important objective to continuously improve the enabling environment for CA to flourish and various forums, conferences and workshops are being supported in this regard.
- The implementation of on-farm, farmer-led research projects among commercial and smallholder farmers is seen as major milestones in the implementation and out-scaling of the CA-FIP. At the moment a number of projects are implemented at various sites (three with commercial producers at Ottosdal, Reitz and Vrede, and three with smallholder farmers in KwaZulu-Natal and Eastern Cape) and follow the innovation systems approach, having producers in the centre of the innovation process. At this stage these projects have shown remarkable success, progress and impact.
- Amidst the various serious environmental threats and dire economic situation of many grain producers, a greater urgency emerged to scale out CA to more producers much faster. For that purpose, much more resources are urgently sourced, including manpower, funding and infrastructure. Various opportunities are continuously being explored in this regard.

Bewaringslandbou (BIP-BL) begin om bekommernisse oor buitensporig hoë gronddegradasiekoerse, winsgewendheid en armoede in graanproduserende gebiede te ondersoek.

VORDERING EN BELANGRIKSTE PRESTASIES

- Die BIP-BL by Graan SA het verskeie belangrike strategiese doelwitte 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 vyfde jaar (seisoen) agter die rug en beduidende momentum is reeds in die sesde seisoen opgebou.
- Die getal BL-verwante artikels wat gepubliseer word, het beduidende toegeneem, veral in die *SA Graan/Grain*-tydskrif. Dit word steeds as baie relevant en belangrik beskou en sal voortgaan. Ander relevante belanghebbendes soos gewilde tydskrifte (byvoorbeeld *Landbouweekblad* en *Farmers Weekly*) is betrek om die proses te versnel. Toegang tot al die artikels in *SA Graan/Grain* kan deur die Graan SA-webwerf verkry word.
- Bewustheid van BL sal voortgesit en versnel word. Enige tersaaklike gehaltegebeure soos die jaarlikse KwaZulu-Natal-konferensie oor geenbewerking en produsentedae is geleenthede om BL te bevorder, insluitend die rol van die Mielietrust en/of Graan SA.'n Aantal suksesvolle bewustheidsgeleenthede is in hierdie tydperk gehou, veral die Ottosdal- (13 - 14 Maart 2018) en die Reitz-konferensies (19 - 20 Maart 2018, laasgenoemde in samewerking met die Riemland-studiegroep, *Landbouweekblad*, VKB en DeKalb Seed), en 'n aantal produsentedae in die KwaZulu-Natal- en Oos-Kaapse kleinskaalse studiegebiede. 'n Nuwe bewustheidsinisiatief, die ontwikkeling van 'n reeks BL-video's (Shepherds of the Soil), is in November 2016 bekend gestel. Video's is reeds op die webwerf beskikbaar en nuwe video's is in 2018 saamgestel. Dr. Smith was ook 'n lid van die organiseringskomitees van die Nasionale LandCare-konferensie (Bloemfontein, 25 - 27 September), en die tweede Afrika-bewaringslandboukonferensie (Johannesburg, 9 - 11 Oktober 2018), waar hy aanbiedings oor die resultate van die BIP-BL gemaak het.
- Die Argentynse samewerking was 'n belangrike projek vir Graan SA. Hierdie ooreenkoms het in Julie 2017 geëindig. Die verlenging is met die Argentynse kollegas onderteken, maar besonderhede oor die implementering van proewe vir die 2017/2018-seisoen kon nie met hulle gefinaliseer word nie. Verskeie proewe op plase is met behulp van die Argentynse stelsel in die onderskeie studiegebiede gevestig, en 'n studietoer na Argentinië is in Junie 2018 vir twee BIP-BL-deelnemers befonds.
- Deelname aan nasionale BL-forums word as 'n belangrike doelwit beskou om die bemagtigende omgewing te verbeter sodat BL kan floreer, en verskeie forums, konferensies en werkswinkels word in hierdie verband ondersteun.
- Die implementering van navorsingprojekte op plase en onder die leiding van boere onder kommersiële produsente en kleinskaalse boere word as belangrike mylpale in die implementering en uitbreiding van die BIP-BL beskou. Tans word 'n aantal projekte op verskeie terreine (drie by kommersiële produsente te Ottosdal, Reitz en Vrede, en drie by kleinskaalse boere in KwaZulu-Natal en die Oos-Kaap) geïmplementeer en die innoveringstelselbenadering word gevolg, met boere as die middelpunt van die innoveringsproses. Op hierdie stadium toon hierdie projekte besondere sukses, vordering en impak.
- As gevolg van ernstige omgewingsbedreigings en die swak ekonomiese situasie van talle graanprodusente is 'n groter dringendheid geïdentifiseer om BL baie vinniger onder meer produsente bekend te stel. Vir daardie doel word baie meer hulpbronne dringend benodig, insluitend mannekrag, befondsing en infrastruktuur. Verskeie geleenthede word deurlopend in hierdie verband ondersoek.

1 Jane McPherson
PROGRAMME MANAGER: BLOEMFONTEIN OFFICE
PROGRAMBESTUURDER: BLOEMFONTEIN-KANTOOR

2 Dr Willie Kotzé
OPERATIONS MANAGER: BLOEMFONTEIN OFFICE
BEDRYFSBESTUURDER: BLOEMFONTEIN-KANTOOR

3 Sam Ruiters
TRAINING ADMINISTRATOR
OPLEIDINGSADMINISTRATEUR

4 Madeleen Steyn
FINANCIAL/OFFICE ADMINISTRATOR
FINANSIËLE/KANTOORADMINISTRATEUR

5 Frikkie du Toit
FINANCIAL AND OFFICE ADMINISTRATOR
FINANSIËLE EN KANTOOR-ADMINISTRATEUR

6 Stephanie Johnson
DATA BASE ADMINISTRATOR
DATABASISADMINISTRATEUR

7 Mariaan Harmse
FINANCIAL AND OFFICE ASSISTANT
FINANSIËLE EN KANTOORASSISTENT

8 Graeme Engelbrecht
DEVELOPMENT CO-ORDINATOR: DUNDEE
ONTWIKKELINGSKOÖRDINEERDER: DUNDEE

9 Nathi Mazibuko
OFFICE ASSISTANT
KANTOORASSISTENT

10 Luke Collier
DEVELOPMENT CO-ORDINATOR: KOKSTAD
ONTWIKKELINGSKOÖRDINEERDER: KOKSTAD

11 Luthando Diko
OFFICE ASSISTANT: KOKSTAD
KANTOORASSISTENT: KOKSTAD

12 Johan Kriel
DEVELOPMENT CO-ORDINATOR: LADYBRAND
ONTWIKKELINGSKOÖRDINEERDER: LADYBRAND

13 Dimakatso Nyambose
OFFICE ASSISTANT: LADYBRAND
KANTOORASSISTENT: LADYBRAND

14 Du Toit van der Westhuizen
DEVELOPMENT CO-ORDINATOR: LICHTENBURG
ONTWIKKELINGSKOÖRDINEERDER: LICHTENBURG

15 Lebo Mogatlanyane
OFFICE ASSISTANT: LICHTENBURG
KANTOORASSISTENT: LICHTENBURG

16 Jurie Mentz
DEVELOPMENT CO-ORDINATOR: LOUWSBURG
ONTWIKKELINGSKOÖRDINEERDER: LOUWSBURG

Continued on page 48
Vervolg op bladsy 48

FARMER DEVELOPMENT

LANDBOU-ONTWIKKELING

STRATEGIC FOCUS AREAS

- To contribute towards building a united and prosperous agricultural sector
- To facilitate healthy and sustainable transformation in the grain growing sector through farmer development initiatives
- To contribute to increased food availability and food sovereignty
- To facilitate improved income generation opportunities for those with access to land
- To capacitate subsistence, smallholder and commercial black farmers
- To promote farmer education through the dissemination of useful and relevant information about the optimal use of land and available resources

STRATEGIESE FOKUSAREAS

- Om tot die bou van 'n verenigde en welvarende landbousektor by te dra
- Om deur middel van landbou-ontwikkelings-inisiatiewe gesonde en volhoubare transformasie in die graanproduksiesektor te fasiliteer
- Om tot groter voedselbeskikbaarheid en voedselsoewereiniteit by te dra
- Om beter inkomstegenererende geleenthede vir diegene met toegang tot grond te fasiliteer
- Om bestaans-, kleinskaalse en kommersiële swart boere te bemagtig
- Om die opvoeding van boere te bevorder deur nuttige en tersaaklike inligting oor die optimale gebruik van grond en beskikbare hulpbronne te versprei

HIGHLIGHTS

- We are inspired by the Grain SA and Jobs Fund project – from subsistence to abundance – we are truly seeing growth and progress because of this work.
- 26 September 2018 @ NAMPO Park – an unforgettable Day of Celebration.
- Identifying inspirational role-models through the Farmer of the Year competition.
- Successful, well attended training courses – very positive feedback from course attendees.
- Meeting many wonderful, hardworking and ambitious South African farmers who are eager to learn and grow and take hold of every opportunity presented to them.
- Networking with amazing partners who believe the work we are doing is truly making a difference and who 'put their hands in their pockets' to help too.

HOOGTEPUNTE

- Ons word geïnspireer deur die Graan SA en Jobs Fund-projek – van bestaan tot oorvloed – ons sien waarlik groei en vordering as gevolg van hierdie werk.
- 26 September 2018 @ NAMPO Park – 'n onvergeetlike Feesdag.
- Die identifisering van inspirerende rolmodelle deur die Boer van die Jaar-kompetisie.
- Suksesvolle opleidingskursusse wat goed bygewoon word – uiters positiewe terugvoer van kursusgangers.
- Ontmoet talle wonderlike, hardwerkende en ambisieuse Suid-Afrikaanse boere wat gretig is om te leer en te groei en elke geleentheid te benut wat oor hulle pad kom.
- Netwerking met wonderlike vennote wat glo dat die werk wat ons doen werklik 'n verskil maak en wat ook hulle "hand in eie sak steek" om te help.

GROWING FOOD, GROWING PEOPLE AND GROWING PROSPERITY

PRODUSEER VOEDSEL, ONTWIKKEL MENSE EN SKEP WELVAART

Executive summary

Mission

Our mission is to capacitate black commercial producers and to contribute to household and national food security through the optimal use of the land and resources available to the farmers.

Vision

'It's not enough to have lived. We should be determined to live for something.' – WINSTON CHURCHILL

We will:

- Assist farmers to produce the highest yields possible from every hectare that they plant, regardless of the nature of their access to land or the size of their farming operations.

Bestuursopsomming

Missie

Ons missie is om swart kommersiële produsente te bemagtig en tot huishoudelike en nasionale voedselsekerheid by te dra deur die optimale gebruik van die grond en hulpbronne wat tot die boere se beskikking is.

Visie

"Dit is nie genoeg om te leef nie. Ons moet vasberade wees om vir iets te leef." – WINSTON CHURCHILL

Ons sal:

- Boere help om die hoogste opbrengste moontlik te produseer op elke hektaar waarop hulle plant, ongeag die aard van hulle toegang tot grond of die omvang van hulle boerderybedrywighede.

Continued from page 46
Vervolg van bladsy 46

17 Sydwell Nkosi
OFFICE ASSISTANT: LOUWSBURG
KANTOORASSISTENT: LOUWSBURG

18 Sinelizwi Fakade
DEVELOPMENT CO-ORDINATOR: MTHATHA
ONTWIKKELINGSKOÖRDINEERDER: MTHATHA

19 Cwayita Mpotyi
OFFICE ASSISTANT: MTHATHA
KANTOORASSISTENT: MTHATHA

20 Jerry Mthombothi
DEVELOPMENT CO-ORDINATOR: MBOMBELA
ONTWIKKELINGSKOÖRDINEERDER: MBOMBELA

21 Smangaliso Zimbili
OFFICE ASSISTANT: MBOMBELA
KANTOORASSISTENT: MBOMBELA

22 Liana Stroebel
DEVELOPMENT CO-ORDINATOR: PAARL
ONTWIKKELINGSKOÖRDINEERDER: PAARL

- Equip farmers with relevant knowledge about best practices and new technologies so they know what to do, how to do it and when to do it.
- Facilitate in developing useful networks of sectoral role-players around the developing farmers.

Some challenges faced by developing farmers:

- Lack of knowledge, skills and experience.
- Difficulty accessing production credit.
- Inadequate mechanisation and farming equipment.
- Constraints of land ownership and land access.
- Poor infrastructure.

We are neither able to source land nor act as a financial institution, but as a vibrant grain commodity organisation we do have an amazing team equipped to build capacity, grow knowledge and offer expert agricultural insights from grassroots to national level.

'Our daily deeds as ordinary South Africans must produce an actual South African reality that will reinforce humanity's belief in justice, strengthen its confidence in the nobility of the human soul, and sustain all our hopes for a glorious life for all.' – NELSON MANDELA

Ever since the establishment of Grain SA in June 1999, Grain SA Congress and a number of other stakeholders, including the grain trusts and a number of agri-businesses, have consistently invested in the farmer development sector. These partnerships have made a significant contribution towards the fast-tracking of knowledge transfer and skills development in the agricultural sector. It would be naïve to say that all has been plain sailing, because it has been a steep learning curve for all. It would be equally inaccurate to say there has been no progress, because there most certainly has been. These partnerships:

- Contributed to farmer education and skills development within the grain sector.
- Pursued the optimisation of grain production per unit area, using appropriate modern best practices and technologies.
- Improved the contribution of emerging farmers to national grain production and strengthened food security.
- Ensured the building of relationships and support systems between developing farmers and an extended network of sectoral stakeholders.
- Assisted with the facilitation of many other initiatives, e.g. the Jobs Fund project – from subsistence to abundance; the Department of Rural Development and Land Reform through their Rural Enterprise and Industrial Development (REID) programme; the Department of Rural Development and Agrarian Reform (DRDLR)'s Recapitalisation and Development Programme (RECAP) in the Free State province; and support to farmers for mechanisation in the Eastern Cape through DRDAR.

Our programme focuses as much on meaningful human development as we do on agricultural production practices. We believe that through the work done, food security and the productivity of the grain producing sector have been strengthened and many South African farmers have renewed confidence and hope. Thousands of developing farmers in South Africa are reaping the rewards of doing the right thing at the right time in the right way. **We strive to ensure that no South African grain farmer is left behind!**

- Boere toerus met tersaaklike kennis oor beste praktyke en nuwe tegnologieë sodat hulle weet wat om te doen, hoe om dit te doen en wanneer om dit te doen.
- Fasilitering verskaf om nuttige netwerke van sektorrolspelers om ontwikkelende boere op te bou.

'n Paar van die uitdagings wat ontwikkelende boere in die gesig staar:

- Gebrek aan kennis, vaardighede en ervaring.
- Uitdagings om produksiekrediet te bekom.
- Onvoldoende meganisering en boerderytoerusting.
- Beperkinge van grondbesit en toegang tot grond.
- Swak infrastruktuur.

Hoewel ons nóg grond kan bekom, nóg as 'n finansiële instelling kan optree, het ons as 'n lewenskragtige graanbedryfsorganisasie wel 'n wonderlike span wat toegerus is om kapasiteit te bou, kennis te ontwikkel en vanaf voetsool- tot nasionale vlak kundige landbou-insig te verskaf.

"Ons alledaagse dade as gewone Suid-Afrikaners moet 'n werklike Suid-Afrikaanse realiteit produseer, wat die mensdom se geloof in geregtigheid asook sy vertroue in die edelheid van die menslike siel sal versterk, en al ons hoop vir 'n glansryke lewe vir almal in stand sal hou." – NELSON MANDELA

Sedert Graan SA in Junie 1999 gestig is, het die Graan SA Kongres en 'n aantal ander belanghebbendes, insluitend die graantrusts en 'n aantal landbou-ondernemings, deurlopend in die landbou-ontwikkelingsektor belê. Hierdie vennootskappe het 'n beduidende bydrae tot die versnelling van kennisoordrag en vaardigheidsontwikkeling in die landbousektor gemaak. Dit sou naïef wees om te sê dat alles seepglad verloop, want dit is 'n steil leerkurwe vir almal van ons. Dit sou net so onakkuraat wees om te sê daar was geen vordering nie, want daar was beslis. Hierdie vennootskappe:

- Het tot boere in die graansektor se opvoeding en vaardigheidsontwikkeling bygedra.
- Het die optimalisering van graanproduksie per eenheidgebied met behulp van toepaslike moderne beste praktyke en tegnologieë nagestreef.
- Het die bydrae van opkomende boere tot nasionale graanproduksie en die versterking van voedselsekerheid verbeter.
- Het die bou van verhoudings en steunstelsels tussen ontwikkelende boere en 'n uitgebreide netwerk van sektorbelanghebbendes verseker.
- Het met die fasilitering van talle ander inisiatiewe ondersteuning verleen, byvoorbeeld die Jobs Fund-projek – van bestaan tot oorvloed; die Departement van Landelike Ontwikkeling en Grondhervorming deur hulle landelike ondernemings- en bedryfsontwikkelingsprogram (REID); die Departement van Landelike Ontwikkeling en Landbouhervorming (DLOLH) se herkapitaliserings- en ontwikkelingsprogram (RECAP) in die Vrystaat; en ondersteuning aan boere vir meganisering in die Oos-Kaap deur die DLOLH.

Ons program fokus in gelyke mate op mense se ontwikkeling en op landbouproduksiepraktyke. Ons glo dat voedselsekerheid en die produktiwiteit van die graanproduksiesektor versterk is deur die werk wat gedoen is, en talle Suid-Afrikaanse boere het nuwe vertroue en hoop. Duisende ontwikkelende boere in Suid-Afrika pluk die vrugte omdat hulle die regte ding op die regte tyd en op die regte manier doen. **Ons streef daarna om seker te maak dat geen Suid-Afrikaanse graanboer agterbly nie!**

Grain SA Farmer Development Programme: An introduction

'Agriculture is not crop production as popular belief holds – it's the production of food and fibre from the world's lands and waters. Without agriculture it is not possible to have a city, stock market, banks, university, church or army. Agriculture is the foundation of civilisation and any stable economy.' – ALAN SAVORY

South Africa has many black developing farmers producing grain crops on wide ranging scales of operations – from subsistence and smallholder farmers to highly intensive commercial producers. **Vision 2030 of the National Development Plan calls for an inclusive rural economy in which rural communities should have greater opportunities to participate fully in the economic, social and political life of the country**. It holds that rural economies will be supported by agriculture and there will be better integration of rural areas through land reform, job creation and poverty alleviation. Clearly transformation in the grain sector remains at the centre of national government policy, therefore a multipronged approach towards ensuring the commercial viability and sustainability of emerging commercial producers is a priority for all stakeholders in the agricultural sector.

The challenges to the ideal are significant. The sector is facing rising input costs; an uneven trade environment, including highly subsidised imports which jeopardise local economy and small scale farmers in particular, e.g. the competition for local poultry and dairy industries against dirt cheap imports; lack of infrastructure including rail, roads and electricity supply and an erratic and unreliable transformation policy environment. We believe that strategic interventions are necessary if land reform programmes are to achieve the desired results – particularly in the way they are intended to revive rural communities.

Although we do not have infinite capacity to change policy as grain farmers of this country, we do have know-how and to this end we commit to pursuing every opportunity to share knowledge and assist in the transformation process in pursuit of viable and sustainable grain growing enterprises operated by informed, skilled developing farmers. With the wide network of strategic partnerships that has been formed and now operates across the many differentiated platforms which make up the programme, we believe there is evidence of personal growth and skills development, which is positively impacting growth in the development arena.

PARTNERSHIPS

Everyone can make a difference. Together we can make a change.

We do not – and cannot – accomplish anything alone. This report to the Grain SA Congress of delegates strives to detail the kaleidoscope of activities that make the Grain SA Farmer Development Programme the multi-dimensional approach to farmer development that it is. The table on page 51 lists names of trust funds, grain sector organisations, government departments and initiatives and commercial enterprises that partner with us. (Please note these

Graan SA Landbou-ontwikkelingsprogram: Bekendstelling

"Landbou is nie gewasproduksie soos algemeen geglo word nie – dit is die produksie van voedsel en vesel uit die wêreld se grond en water. Sonder landbou is dit nie moontlik om 'n stad, aandelemarkte, banke, universiteite, kerke of 'n weermag te hê nie. Landbou is die grondslag van die beskawing en enige stabiele ekonomie." – ALAN SAVORY

Suid-Afrika het talle swart ontwikkelende boere wat graangewasse met 'n wye omvang van bedryfskale produseer – van bestaans- en kleinskaalse boere tot uiters intensiewe kommersiële produsente. **Visie 2030 van die Nasionale Ontwikkelingsplan vra vir 'n inklusiewe landelike ekonomie waarin landelike gemeenskappe groter geleenthede moet hê om ten volle aan die ekonomiese, sosiale en politieke lewe van die land deel te neem**. Daarvolgens sal landelike ekonomieë deur landbou ondersteun word, en daar sal deur middel van grondhervorming, werkskepping en armoedeverligting beter integrasie van landelike gebiede wees. Dit is duidelik dat transformasie in die graansektor die kern van die nasionale regering se beleid bly, dus is 'n veeltakkige benadering om die kommersiële lewensvatbaarheid en volhoubaarheid van opkomende kommersiële produsente te verseker vir alle belanghebbendes in die landbousektor 'n prioriteit.

Die uitdagings vir die ideaal is groot. Die sektor staar stygende insetkoste; 'n ongelyke handelsomgewing, insluitend hoogs gesubsidieerde invoere wat die plaaslike ekonomie en veral kleinskaalse boere in gevaar stel, byvoorbeeld die mededinging van plaaslike pluimvee- en suiwelbedrywe teen spotgoedkoop invoere; 'n gebrek aan infrastruktuur, insluitend spoorvervoer, paaie en elektrisiteitstoevoer; en 'n onseker en onbetroubare transformasiebeleidomgewing in die gesig. Ons glo dat strategiese intervensie nodig is indien grondhervormingsprogramme die verlangde resultate moet behaal – veral op die manier waarop hulle veronderstel is om landelike gemeenskappe te laat herleef.

Hoewel ons as graanboere van hierdie land nie 'n oneindige vermoë het om beleid te verander nie, het ons wel kundigheid, en met hierdie doel voor oë verbind ons ons tot die nastreef van elke geleentheid om kennis te deel en met die transformasieproses te help ten einde lewensvatbare en volhoubare graanproduserende ondernemings te bevorder wat deur ingeligte en vaardige ontwikkelende boere bedryf word. Met die wye netwerk strategiese vennootskappe wat gevorm is en nou regoor die talle gedifferensieerde platforms werk waaruit die program bestaan, glo ons dat daar bewyse is van persoonlike groei en vaardigheidsontwikkeling, wat 'n positiewe impak op groei in die ontwikkelingsarena het.

VENNOOTSKAPPE

Elkeen kan 'n verskil maak. Saam kan ons verandering bring.

Ons kan nie alleen enigiets regkry nie. Hierdie verslag aan die Graan SA Kongres van afgevaardigdes probeer om die kaleidoskoop van aktiwiteite uiteen te sit wat die Graan SA Landbou-ontwikkelingsprogram die multidimensionele benadering tot landbou-ontwikkeling maak wat dit is. Die tabel op bladsy 51 lys die name van trustfondse, graansektororganisasies, staatsdepartemente en inisiatiewe en kommersiële ondernemings wat ons vennote is. Let asseblief daarop

role-players are listed **alphabetically and not in relation to their contribution** to the programme):

Afgri
AgriSETA
Department of Science and Technology
Grain SA
Jobs Fund of the National Treasury
Kynoch
Maize Trust
Monsanto
Oil and Protein Seeds Development Trust
Omnia
Pannar
Pioneer
SA Lime and Gypsum
Sasol Trust
Silostrat
Syngenta
Villa Crop
Winter Cereal Trust

THE TOOLBOX OF COMMUNICATION STRATEGIES

The aim of the Grain SA Farmer Development Programme is to equip farmers. Every activity undertaken within this programme is tailored with the specific intention of transferring knowledge and skills, *inter alia* via:

1. **Study group meetings** where farmers have access to information and expert advice.

   These set the Grain SA footprint in key grain growing regions – even very remote areas; entrance level; builds relationships – we get to know the farmers and they learn to trust us; opportunity to identify unique challenges and opportunities in a specific region; transfer of information – both theory and practice. Mentors and managers can be instrumental in updating farming systems and changing lives.

2. Region appropriate **demonstration trials**

   'Tell me and I forget. Teach me and I remember. Involve me and I learn.' – BENJAMIN FRANKLIN

   We involve local farmers in the planning and prep of trial plots. We show them why we propose to do things in a specific way. Scientific research has proved that farmers learn best from seeing with their own eyes in their own location and they change more willingly and arrive at more effective farming operations and enterprise profitability improves.

3. Informative **farmers days**

   Gatherings are organised to bring farmers to see the trial plots, to learn from experts – both Grain SA and industry representatives; and to build their own agricultural support networks.

4. **Support to advanced farmers**

   'Who will catch them if they fall?'

   A need was identified to support advanced developing farmers who have grown beyond study groups and are almost ready to farm independently, but will likely benefit from a year's intensive one-to-one mentoring.

5. The monthly newsletter: ***Pula Imvula*** – this is a vital tool to facilitate the widespread dissemination of relevant information and it is the only sector specific farmer development magazine published currently in seven South African languages.

dat hierdie rolspelers **alfabeties gelys word, en nie op grond van hulle bydrae** tot die program nie:

Afgri
AgriSETA
Departement Wetenskap en Tegnologie
Graan SA
Jobs Fund van die Nasionale Tesourie
Kynoch
Mielietrust
Monsanto
Olie- en Proteïensade-ontwikkelingstrust
Omnia
Pannar
Pioneer
SA Kalk en Gips
Sasol Trust
Silostrat
Syngenta
Villa Crop
Wintergraantrust

DIE GEREEDSKAPKIS MET KOMMUNIKASIESTRATEGIEË

Die doel van die Graan SA Landbou-ontwikkelingsprogram is om boere toe te rus. Elke aktiwiteit wat in hierdie program onderneem word, is ontwerp met die spesifieke doelwit om kennis en vaardighede oor te dra, onder andere deur middel van:

1. **Studiegroepbyeenkomste** waar boere toegang tot inligting en kundige advies het.

   Dit plaas die Graan SA-voetspoor in belangrike graanproduksiegebiede – selfs uiters afgeleë gebiede; toegangsvlak; bou verhoudings – ons leer boere ken en hulle leer om ons te vertrou; geleentheid om unieke uitdagings in 'n spesifieke streek te identifiseer; oordrag van inligting – teoreties sowel as prakties. Mentors en bestuurders kan help om boerderystelsel by te werk en lewens te verander.

2. Streekstoepaslike **demonstrasieproewe**

   "Vertel my en ek vergeet. Leer my en ek onthou. Betrek my en ek leer." – BENJAMIN FRANKLIN

   Ons betrek plaaslike boere by die beplanning en voorbereiding van demonstrasieproewe. Ons wys hulle waarom ons voorstel dat dinge op 'n spesifieke manier gedoen moet word. Wetenskaplike navorsing het getoon dat boere die beste leer as hulle dit eerstehands op hul eie plek sien. Hulle is dan meer bereid om te verander, beoefen doeltreffender boerderybedrywighede, en ondernemings se winsgewendheid verbeter.

3. Insiggewende **boeredae**

   Byeenkomste word georganiseer om boere te lok om die demonstrasieproewe te besoek en by kundiges – Graan SA sowel as bedryfsverteenwoordigers – te leer; en om hulle eie landbou-ondersteuningsnetwerke te bou.

4. **Steun aan gevorderde boere**

   "Wie sal hulle vang as hulle val?"

   'n Behoefte is geïdentifiseer om gevorderde ontwikkelende boere te ondersteun wat studiegroepe ontgroei het en feitlik gereed is om onafhanklik te boer, maar waarskynlik by 'n jaar se intensiewe een-tot-een-mentorskap sal baat.

5. Die maandelikse nuusbrief: ***Pula Imvula*** – is 'n noodsaaklike instrument om die wye verspreiding van tersaaklike inligting te fasiliteer, en dit is die enigste sektor-spesifieke landbou-ontwikkelingstydskrif wat

Nora Cruz Quebral, often referred to as the 'mother of development communication' said, 'The purpose of development communication is to advance development. Development requires that a mass of people with a low rate of literacy and income and the socio-economic attributes that go with it, first of all be informed about and motivated to accept and use a sizeable body of hitherto unfamiliar ideas and skills in very much less time than that process would normally take.'

6. **Training courses**

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.

7. **Farmer of the Year competition**

The idea is to identify role-models who serve to inspire other farmers – a moment to celebrate learning, development and growth.

8. **Schools programme**

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 workforce every year.

9. **Internship programme**

To give future young farmers and potential extension officers the opportunity to work closely with experienced members of the team, be part of the admin and teaching platforms and attend training courses run by Grain SA to entrench knowledge and skills in a meaningful and practical manner.

Farmers and strategic role-players are involved in Grain SA activities on a number of different platforms as can be seen in the table below.

tans in sewe Suid-Afrikaanse tale gepubliseer word. Nora Cruz Quebral, wat dikwels die moeder van ontwikkelingskommunikasie genoem word, sê die doel van ontwikkelingskommunikasie is om ontwikkeling te bevorder. Ontwikkeling vereis dat 'n massa mense met 'n lae geletterdheidskoers en inkomste en die sosio-ekonomiese eienskappe wat daarmee gepaardgaan eerstens ingelig moet word oor en gemotiveer moet word om 'n aansienlike hoeveelheid onbekende idees en vaardighede te aanvaar en te gebruik binne 'n baie korter tydperk as wat die proses normaalweg sou verg.

6. **Opleidingskursusse**

Vaardigheidsontwikkeling in landbou is 'n belegging in die toekoms. Die kursusse is spesifiek ontwerp vir ontwikkelende boere en balanseer teorie en 'n praktiese benadering.

7. **Boer van die Jaar-kompetisie**

Die idee is om rolmodelle te identifiseer wat dien om ander boere te inspireer – 'n oomblik om leer, ontwikkeling en groei te vier.

8. **Skoleprogram**

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 produsente of in ander loopbane aan landbou deel te neem. Afrika is 'n jong vasteland met 65% van sy bevolking jonger as 35 jaar, en 10 tot 12 miljoen jongmense wat na raming elke jaar die arbeidsmag betree.

9. **Internskapprogram**

Om aan jong boere en potensiële voorligtingsbeamptes die geleentheid te gee om nóú met ervare lede van die span saam te werk en deel te wees van die admin en onderrigplatforms, en opleidingskursusse by te woon wat deur Graan SA aangebied word om kennis en vaardighede op 'n betekenisvolle en praktiese manier vas te lê.

Boere en strategiese rolspelers is op 'n aantal verskillende platforms by Graan SA se aktiwiteite betrokke, soos in die tabel hieronder gesien kan word.

	Dundee	Kokstad	Ladybrand	Lichtenburg	Louwsburg	Maclear	Mthatha	Mbombela	Paarl	Total / Totaal
Subsistence farmers/Bestaansboere	1 870	2 313	109	174	2 046	846	4 058	1 333		12 749 farmers/boere
Smallholder farmers/Kleinskaalse boere	21	28	72	185	68	38	47	41	5	505 farmers/boere
Potential commercial farmers/ Potensiële kommersiële boere	1	8	94	125	7	10			19	264 producers/produsente
New era farmers/Nuwe era-boere	4	5	41	32	18	2			5	104 farmers/boere
Study groups/Studiegroepe	15	45	12	17	13	15	69	19	7	212 study groups/studiegroepe
Study group members/Studiegroeplede	1 977	2 369	492	540	1 968	888	4 074	1 336	97	13 841 farmers/boere
Meetings held/Vergaderings gehou	1 317	838	313	345	1 086	671	759	1 002	9	6 340 meetings/vergaderings
Jobs Fund farmers/Jobs Fund-boere	743	755			713	142	1 031	399		3 783 farmers/boere
Demonstration trials/Demonstrasieproewe	6	7		5	5		4	7	2	36 trials/proewe
Farmers days' attendance/Boeredae-bywoning	455	152	314	184	475		1 100	460	52	3 409 farmers/boere
Advanced farmers/Gevorderde boere	8	26	27	22	20	12	9	8	8	140 farmers/boere
REID farmers funded/REID-boere befonds	21	10	25		53					109 farmers/boere
RECAP farmers funded/RECAP-boere befonds			17							17 farmers/boere
Training courses/Opleidingskursusse	65	59	13	6	57	38	90	46	34	408 courses/kursusse
Training course attendance/ Bywoning van opleidingskursusse	989	781	221	70	845	323	1 133	706	174	5 242 farmers/farm workers/ boere/plaaswerkers
Pula Imvula magazine/*Pula Imvula*-tydskrif	2 043	1 870	1 777	1 496	2 092	1 376	1 808	1 171	149	13 782 copies/kopieë
Farmer access to arable land/ Boere se toegang tot bewerkbare grond	4 850	3 241	36 096	56 771	11 575	5 675	5 505	4 593	11 960	140 266 ha

OPERATIONAL COSTS FOR THE FARMER DEVELOPMENT PROGRAMME

BEDRYFSKOSTE VAN DIE LANDBOU-ONTWIKKELINGSPROGRAM

Total grain Farmer Development Programme budget Totale begroting vir Landbou-ontwikkelingsprogram vir graan		
Projects Porjekte	**Funders Befondsers**	**Amount Bedrag (R)**
Creation of and servicing of study groups/Skep en diens van studiegroepe Support to individual farmers/Ondersteuning aan individuele boere Demonstration trial plots/Demonstrasieproeflanderye Farmers days/Boeredae Farmer of the Year competition/Boer van die Jaar-kompetisie	Maize Trust/Mielietrust, Winter Cereal Trust/Wintergraantrust, Monsanto, Afgri, Pioneer, Pannar, Sasol Base Chemicals, Omnia, Silostrat, Grain SA/Graan SA	14 078 801
Training courses/Opleidingskursusse	Maize Trust/Mielietrust	2 656 081
	OPOT	677 400
	Winter Cereal Trust/Wintergraantrust	690 855
	AgriSETA	300 782
	DST/DWT	1 399 000
Pula Imvula	Maize Trust/Mielietrust	2 701 984
	OPOT	371 921
	Winter Cereal Trust/Wintergraantrust	345 231
	Commercial (expanded English)/Kommersieel (uitgebreide Engels)	174 263
Schools programme/Skoleprogram	Maize Trust/Mielietrust	500 000
	AgriSETA	134 000
Jobs Fund	Farmers/Boere, Monsanto, Kynoch, SA Lime and Gypsum/SA Kalk en Gips, Syngenta, Villa Crop, Grain SA/Graan SA, Sasol Agricultural Trust, Jobs Fund of the National Treasury/Jobs Fund van die Nasionale Tesourie	41 444 000
Threshing machines/Dorsmasjiene Baggers and bag stitchers/Sakmasjiene en saktoewerkmasjiene Bean seed/Bonesaad	Sasol Base Chemicals and Department of Science and Technology (DST)/Sasol Base Chemicals en Departement Wetenskap en Tegnologie (DWT)	1 600 000
DRDAR mechanisation for farmers and intern support/DLOLH-meganisering vir boere en interne steun	DRDAR Eastern Cape/DLOLH Oos-Kaap	13 747 800
Total/Totaal		**80 822 118**

THE PROGRAMME BASE: PURPOSEFUL PEOPLE AND PROJECTS

To think...that everything you do has a ripple effect, that every word you speak and every action you take, affects other people – and the planet...This changes the way one lives.

The Farmer Development Programme of Grain SA has run for many years now and has been made possible by the generous contributions of our donors and partners. It has relied on the expertise of a skilled and dedicated personnel corps. These personnel operate from strategically placed offices in key grain growing regions and this in turn has enabled linkages with – and the implementation of – a number of other compatible projects.

We are fortunate to have partners who share our vision, believe in our work and who sponsor the costs of the various offices where we have development co-ordinators and office administrators. In Bloemfontein there is a core of personnel who manage the many aspects of this dynamic programme and deal with the financial management. The support to the offices is essential to the entire programme and we are most appreciative of their support.

Overview of Grain SA's Farmer Development activities

STUDY GROUP SERVICES

The study group lies at the heart of the Grain SA Farmer Development (GSA FD) programme. This is where we meet the

DIE PROGRAMBASIS: DOELGERIGTE MENSE EN PROJEKTE

Om te dink...dat alles wat jy doen 'n rimpeleffek het, dat elke woord wat jy sê en elke ding wat jy doen ander mense – en die planeet – raak...Dit verander die manier waarop jy leef.

Graan SA se Landbou-ontwikkelingsprogram is reeds jare lank aan die gang en word deur die ruim bydraes van ons skenkers en vennote moontlik gemaak. Dit maak op die kundigheid van 'n vaardige en toegewyde personeelkorps staat. Hierdie personeel werk uit strategies-geplaasde kantore in belangrike graanproduserende streke, en dit maak weer skakeling met en die implementering van 'n aantal ander versoenbare projekte moontlik.

Ons is gelukkig om vennote te hê wat ons visie deel, in ons werk glo en die koste borg van die verskillende kantore waar ons ontwikkelingsbestuurders en kantooradministrateurs het. In Bloemfontein is daar 'n kerngroep personeel wat die talle aspekte van hierdie dinamiese program bestuur en die finansiële bestuur hanteer. Die steun aan die kantore is noodsaaklik vir die hele program en ons waardeer hulle ondersteuning geweldig.

Oorsig van Graan SA se Landbou-ontwikkelingsaktiwiteite

STUDIEGROEPAKTIWITEITE

Die studiegroep is die kern van Graan SA se Landbou-ontwikkelings (GSA LO)-program. Dit is waar ons die boere ontmoet, hulle omstandighede

farmers, get to know their circumstances and challenges and build relationships of trust. This is also where we find the opportunity to do the strongest networking with the farmers. Through consistently pitching up and being present with an attentive ear, a word of advice and sharing our passion for using what they have at their disposal as effectively and sustainably as possible, the farmers have learned that the team can be trusted to help. The meetings are dynamic and varied and are conducted indoors, where DVD and PowerPoint displays inspire them, and outdoors, where our development officers and mentors get down and dirty in the fields demonstrating, fixing, and teaching in very practical hands-on fashion. It is in this way that the farmers have learned that we care and can be counted on!

At present there are 212 active Grain SA study groups with a total membership of 13 841 active farmers.

Comment

The need for continuous farmer development is great. The ripple effect that occurs from one season to the next is not insignificant as neighbours to active Grain SA farmer members are awakened to the possibilities that grain growing with best practices and readily available support systems offer them too. **So far in preparation for the 2018/2019 new season, there have been 2 000 new farmers signing up to study groups in the Eastern Cape region alone.**

Demonstration trials

'Unless Africa uses modern technologies, our farmers' output will remain low and we will remain dependent on others to feed us.' – AKINWUMI ADESINA, 2017 WORLD FOOD PRIZE WINNER

Trials are a wonderful way of showing farmers the right thing to do. The development managers in the various regions make contact with the input supply companies and involve them in the trials. We are grateful to be able to network with so many companies eager to make a contribution to the demonstration plots. Every effort is made to plant and manage the trials in a way that is both progressive and technologically advanced, while at the same time within the reach of the developing farmers. Farmers are able to monitor the progress of the trial plots and see for themselves how successful the strategies are.

Trials have been planted in the rural areas serviced by this programme and the results are excellent. These trials show the importance of good farming practices and are also useful to introduce farmers to climate smart farming adaptations such as soil health, conservation agriculture and no-till farming methods and efficient weed control.

We have successfully created an awareness of modern farming methods, new cultivars, new technologies, conservation agriculture (CA) and climate-smart agriculture (CSA), among other things amongst the farmers. These practical demonstrations afford both trainers and mentors opportunities to show farmers that since dry-land farming is dependent on rain and soil moisture content, changes have to be made to the traditional farming methods to meet the challenges of climate change and climate variability. The good rains which have fallen in this past season ensured 'bumper crops' and yet farmers were still able to compare lands and learn that there are only optimal yields where best practices have been implemented diligently.

FARMERS DAYS

'Education is not the filling of a pot, but the lighting of a fire.' – WB YEATS

Demonstration trials, whether planted by Grain SA or other industry stakeholders, are invaluable for developing farmers to see many aspects and possibilities of farming maize. The farmers days provide

en uitdagings leer ken en vertrouensverhoudings opbou. Dit is ook waar ons die geleentheid kry om die sterkste netwerking met die boere te doen. Deur konsekwent op te daag en aandagtig te luister, advies te gee en ons passie te deel om wat hulle tot hulle beskikking het, so doeltreffend en volhoubaar as moontlik te gebruik, het die boere geleer dat die span vertrou kan word om hulle te help. Die vergaderings is dinamies en uiteenlopend en word binnenshuis gehou waar DVD's en PowerPoint-aanbiedings hulle inspireer, en buitenshuis, waar ons ontwikkelingsbeamptes en mentors saam met hulle op die landerye demonstreer, herstel en op 'n praktiese manier onderrig. Op hierdie manier het boere geleer dat ons omgee en daar op ons staatgemaak kan word.

Daar is tans 212 aktiewe Graan SA-studiegroepe met 'n totale lidmaatskap van 13 841 aktiewe boere.

Kommentaar

Daar is 'n groot behoefte aan deurlopende landbou-ontwikkeling. Die rimpeleffek wat van een seisoen tot die volgende voorkom, is nie onbeduidend nie, aangesien die bure van aktiewe Graan SA-boere bewus word van die moontlikhede wat graanproduksie met die beste praktyke en geredelik beskikbare steunstelsels ook aan hulle bied. **Tot dusver het 2 000 nuwe boere in aanloop tot die 2018/2019-seisoen nét in die Oos-Kaap-streek by studiegroepe aangesluit.**

Demonstrasieproewe

"Tensy Afrika moderne tegnologie gebruik, sal ons boere se uitset laag bly en sal ons van ander afhanklik bly om ons te voed." – AKINWUMI ADESINA, 2017 WORLD FOOD-PRYSWENNER

Proewe is 'n wonderlike manier om aan boere die regte ding te wys om te doen. Die ontwikkelingsbestuurders in die onderskeie streke maak kontak met die insetverskaffingsmaatskappye en betrek hulle by die proewe. Ons is dankbaar dat ons kan netwerk met soveel maatskappye wat gretig is om 'n bydrae tot die demonstrasieproewe te maak. Alles moontlik word gedoen om die proewe op so 'n manier te plant en bestuur dat dit progressief en tegnologies gevorderd is, terwyl dit terselfdertyd binne bereik van die ontwikkelende boere is. Boere kan die vordering van die demonstrasieproewe moniteer en self ervaar hoe suksesvol die strategieë is.

Proewe is geplant in die landelike gebiede wat deur hierdie program gediens word, en die resultate is uitstekend. Hierdie boere toon hoe belangrik goeie boerderypraktyke is en is ook nuttig om boere aan klimaat-slim-aanpassings soos grondgesondheid, bewaringslandbou en geenbewerking-boerderymetodes en doeltreffende onkruidbeheer bekend te stel.

Ons het met sukses 'n bewustheid geskep van moderne boerderymetodes, nuwe kultivars, nuwe tegnologieë, bewaringslandbou (BL) en klimaat-slim-landbou (KSL), onder andere onder die boere. Hierdie praktiese demonstrasies gee aan opleiers en mentors geleenthede om aan boere te wys dat aangesien droëland-boerdery van reën en grondvog afhanklik is, veranderinge aan tradisionele boerderymetodes gemaak moes word om die uitdagings van klimaatverandering en klimaatveranderlikheid die hoof te bied. Die goeie reën wat die afgelope seisoen geval het, het uitstekende oeste verseker, en tog kon boere steeds landerye vergelyk en leer dat optimale opbrengste slegs behaal word waar beste praktyke noulettend geïmplementeer word.

BOEREDAE

"Opvoeding is nie net om 'n pot vol te maak nie, maar om 'n vuur aan te steek." – WB YEATS

Demonstrasieproewe – of dit deur Graan SA of deur ander belanghebbendes in die bedryf geplant word – is uiters waardevol vir ontwikkelende boere om talle aspekte en moontlikhede van die aanplant van mielies te

an opportunity to visit these sites, exchange information with other farmers, input supply companies, local extension officers and other sector stakeholders who are strategically invited to these days. The exposure and information to which farmers are exposed at farmers days cannot be under-valued, particularly for the subsistence and small-scale developing farmers who are being introduced to a broader support network beyond the Grain SA Farmer Development team. We are astutely aware of the need to assist farmers by facilitating the development of a support system for them that comprises other farmers, input providers, industry representatives and stakeholders, and state entities.

2018 DEVELOPING GRAIN FARMER OF THE YEAR COMPETITION

Where there are experts there will be no lack of learners.
– SWAHILI PROVERB

Early in the new year the Grain SA Farmer Development team starts identifying potential candidates for the Grain Farmer of the Year competition. These farmers are monitored, advised and supported throughout the year. If their exemplary performance is consistent and the team believes the farmer is leading by example in his or her community, then they are shortlisted for nomination in the relevant competition category. This year the Grain SA Day of Celebration, where the winners are announced, was held on 26 September 2018 at NAMPO Park. The following farmers were nominated for the 2018 competition:

sien. Die boeredae verskaf 'n geleentheid om hierdie terreine te besoek en inligting te deel met ander boere, insetverskaffingsmaatskappye, plaaslike voorligtingsbeamptes en ander sektorbelanghebbendes wat strategies na hierdie dae uitgenooi word. Die blootstelling en inligting waaraan hierdie boere by boeredae blootgestel word, moet nie onderskat word nie, veral vir die bestaans- en kleinskaalse ontwikkelende boere wat aan 'n wyer ondersteuningsnetwerk buite die Graan SA Landbou-ontwikkeling-span bekend gestel word. Ons is deeglik bewus van die behoefte om boere te help deur die ontwikkeling van 'n steunstelsel vir hulle te fasiliteer wat uit ander produsente, insetverskaffers, bedryfsverteenwoordigers en belanghebbendes, en staatsentiteite bestaan.

2018 ONTWIKKELENDE GRAANBOER VAN DIE JAAR-KOMPETISIE

Waar daar kundiges is, sal daar geen gebrek aan leerders wees nie. – SWAHILI-SPREEKWOORD

Vroeg in die nuwe jaar begin die Graan SA Landbou-ontwikkelingspan om potensiële kandidate vir die Graanboer van die Jaar-kompetisie te identifiseer. Hierdie boere word regdeur die jaar gemoniteer, geadviseer en ondersteun. Indien hulle voorbeeldige prestasie konsekwent is en die span glo die boer lei deur 'n voorbeeld in sy of haar gemeenskap te wees, verskyn hulle op 'n kortlys vir benoeming in die betrokke kompetisiekategorie. Hierdie jaar is die Graan SA Feesdag, waar die wenners aangekondig word, op 26 September 2018 by NAMPO Park gehou. Die volgende boere is vir die 2018-kompetisie benoem:

Nominees from the Dundee study groups / Benoemdes uit die Dundee-studiegroepe

Farmer of the Year category Boer van die Jaar-kategorie	Farmer Boer
Subsistence/Bestaansboer	Dube Victor Bumisani Nelson
Smallholder/Kleinskaalse boer	Hlatshwayo Delani Matikiza
Subsistence/Bestaansboer	Mdluli Liphine Ncamisile
Subsistence/Bestaansboer	Mngadi Gcina Pascalius
Smallholder/Kleinskaalse boer	**Mngadi Nhlanhla Sicelo (CATEGORY WINNER/KATEGORIEWENNER)**

Nominees from the Kokstad study groups / Benoemdes uit die Kokstad-studiegroepe

Farmer of the Year category Boer van die Jaar-kategorie	Farmer Boer
New Era/Commercial/Nuwe era/Kommersieel	Mongoato David
Subsistence/Bestaansboer	Magidela Anderson Cetywayo
Subsistence/Bestaansboer	Njeya Siyavuya

Nominees from the Ladybrand study groups / Benoemdes uit die Ladybrand-studiegroepe

Farmer of the Year category Boer van die Jaar-kategorie	Farmer Boer
Potential Commercial/Potensieel kommersieel	Mabaso Mohlolo Anton
Potential Commercial/Potensieel kommersieel	**Mosia Paulus (CATEGORY WINNER/KATEGORIEWENNER)**
New Era/Commercial/Nuwe Era/Kommersieel	Maqala Tshidiso Daniel
New Era/Commercial/Nuwe Era/Kommersieel	Mbele Mforazana Shadrack
New Era/Commercial/Nuwe Era/Kommersieel	Mbele Malefetsane Lucas
Potential Commercial/Potensieel kommersieel	Mosia Paulus
New Era/Commercial/Nuwe Era/Kommersieel	Malindi Paul
New Era/Commercial/Nuwe Era/Kommersieel	Matshinini Fani Ezekiel
New Era/Commercial/Nuwe Era/Kommersieel	Mphuthi Robert
New Era/Commercial/Nuwe Era/Kommersieel	Maqala Tshidiso Daniel

Nominees from the Lichtenburg study groups

Benoemdes uit die Lichtenburg-studiegroepe

Farmer of the Year category Boer van die Jaar-kategorie	Farmer Boer
New Era/Commercial/Nuwe Era/Kommersieel	Booizene Sampie
New Era/Commercial/Nuwe Era/Kommersieel	Raphoto Rykie

Nominees from the Louwsburg study groups

Benoemdes uit die Louwsburg-studiegroepe

Farmer of the Year category Boer van die Jaar-kategorie	Farmer Boer
Smallholder/Kleinskaalse boer	Mnisi (Zondle AG Coop) Mduduzi David
New Era/Commercial/Nuwe Era/Kommersieel	**Mathebula Jeremia Makhosini (CATEGORY WINNER/KATEGORIEWENNER)**
Smallholder/Kleinskaalse boer	Mnisi (Zondle AG Coop) Mduduzi David
Subsistence/Bestaansboer	Hlatshwayo Mgezeni Richard
Subsistence/Bestaansboer	Shongwe Thembie Linah
Subsistence/Bestaansboer	Zungu Ndlalankulu Jona

Nominees from the Mthatha study groups

Benoemdes uit die Mthatha-studiegroepe

Farmer of the Year category Boer van die Jaar-kategorie	Farmer Boer
Smallholder/Kleinskaalse boer	Rhum Nombewu Zoliwe
Subsistence/Bestaansboer	Mpefu Moses
Subsistence/Bestaansboer	Ngudle Thenjiwe Mirriam
Subsistence/Bestaansboer	Mbalo Nokhaya Regina Nobubele
Subsistence/Bestaansboer	Kutwana Victoria Nomzi
Subsistence/Bestaansboer	Madlebe Mandla Archibalt

Nominees from the Mbombela study groups

Benoemdes uit die Mbombela-studiegroepe

Farmer of the Year category Boer van die Jaar-kategorie	Farmer Boer
Subsistence/Bestaansboer	Magongo Mbuti Alfred
Subsistence/Bestaansboer	Khubheka (Chairperson) Amos
Subsistence/Bestaansboer	**Shoba Jenette Thembi (CATEGORY WINNER/KATEGORIEWENNER)**

ADVANCED FARMER SUPPORT

Advice is a stranger; if he's welcome he stays for the night; if not, he leaves the same day!

The advanced farmers are farmers who have moved up the ranks from study group membership level and have demonstrated aptitude, work ethic and business acumen, all of which have ensured enterprise growth. Most are by now getting to the point where they are farming each hectare to produce the highest possible yield on a semi-commercial scale. These new era farmers have in fact developed beyond the support that is offered at the study group level (information, training and demonstrations). However, we have identified a need to appoint an expert and dedicated mentor who can continue to walk beside them and continue to guide and support them and ensure the path to long-term viability and sustainability for that farmer within the grain growing sector.

140 advanced farmers are currently receiving one-on-one support from a designated mentor and the Regional Development

ONDERSTEUNING AAN GEVORDERDE BOERE

Advies is 'n vreemdeling; as hy welkom is, bly hy vir die nag; indien nie, vertrek hy dieselfde dag!

Die gevorderde boere is boere wat vanaf studiegroepvlak in die geledere opbeweeg en aanleg, werksetiek en sakevernuf getoon het, wat alles die groei van hulle onderneming verseker het. Die meeste van hulle het nou 'n punt bereik waar hulle elke hektaar bewerk om die grootste moontlike opbrengs op 'n semikommersiële skaal te behaal. Hierdie nuwe era-boere het trouens die ondersteuning ontgroei wat op studiegroepvlak verskaf word (inligting, opleiding en demonstrasies). Ons het egter 'n behoefte geïdentifiseer om 'n kundige en toegewyde mentor aan te stel wat steeds saam met hulle kan beweeg en kan voortgaan om hulle te lei en ondersteun om die pad na langtermynlewensvatbaarheid vir daardie boer in die graanproduksiesektor te verseker.

140 gevorderde boere ontvang tans een-tot-een-ondersteuning van 'n aangewese mentor en die streeksontwikkelingsbestuurder

Manager with the intention of fast-tracking them into the fully commercial grain production sector.

ten einde hulle vinnig in die ten volle kommersiële graanproduksie-sektor te plaas.

Province Provinsie	Office Kantoor	Manager Bestuurder	Individually supported farmers Individueel-ondersteunde boere
KwaZulu-Natal	Dundee/Ladybrand	Graeme Engelbrecht	8
Eastern Cape/Oos-Kaap	Kokstad	Luke Collier	26
Free State/Vrystaat	Ladybrand/Dundee	Johan Kriel	27
North West/Noordwes	Lichtenburg	Du Toit van der Westhuizen	22
Mpumalanga/KwaZulu-Natal	Louwsburg/Mbombela	Jurie Mentz	20
Eastern Cape/Oos-Kaap	Maclear	Sarel Pretorius	12
Eastern Cape/Oos-Kaap	Mthatha	Sinelizwi Fakade	9
Mpumalanga	Mbombela/Louwsburg	Jerry Mthombothi	8
Western Cape/Wes-Kaap	Paarl	Liana Stroebel	8
		Total/Totaal	**140 farmers/boere**

The advanced farmer programme has been enthusiastically received and farmers have confirmed their appreciation and need for this type of focused mentoring and intensive intervention for short periods of time per farmer. We do, however, need to access more funding in order to accommodate more farmers in this programme since many farmers have progressed well in their farming enterprises and show potential to develop their farming operations further.

PROJECT: TRAINING

Good training courses structured to be appropriate for the farmers and their activities increase potential and lead to farmers becoming better custodians of the earth. This leads to investments in soil health, which leads to less harm to the environment which in turn leads to safer food production and storage systems. This improves water conservation practices, which leads to educated weed control and use of chemicals, which increases profitability.

Farmer education is not a requirement unique to developing farmers. Indeed all farmers require on-going education to keep up with the rapidly evolving environment. There are continuous new developments in technology, science and business management. Farming requires a wide diversity of knowledge and expertise. Nowadays practical knowledge alone is not enough. In the South African context, developing farmers are often either new entrants or they have not been exposed to modern farming methods and educational opportunities or skills development. With profit margins under extreme pressure, there is no margin for error. Training helps farmers to incorporate the latest scientific advances and technology into their daily operations and ensures that developing farmers are not some of those left behind.

#NoFarmerLeftBehind

Our training courses include both theory and practical sessions on a wide range of topics which have been structured into courses that are sponsored by our partners. The training is delivered in the farmers' language of choice and is designed to make immediate impact to their farming business, workshop management knowledge and plant production capabilities. The regular feedback from the farmers consistently reassures us that we are equipping and empowering them in a meaningful way.

- The courses we have developed are well-designed and are based on the feedback of trainees and trainers as to what training needs exist.
- Courses offered by the Grain SA Farmer Development Programme are about empowerment through the acquisition of new knowledge and skills development.

Die gevorderdeboer-program word entoesiasties ontvang en boere het hulle waardering vir en behoefte aan hierdie tipe gefokusde mentorskap en intensiewe tussenkoms vir kort tydperke vir elke boer bevestig. Ons het egter toegang tot meer fondse nodig ten einde meer boere by hierdie program te betrek, aangesien talle boere se boerderyondernemings goed gevorder het en die potensiaal toon om verder te ontwikkel.

PROJEK: OPLEIDING

Goeie opleidingskursusse wat gestruktureer word om toepaslik te wees vir die boere en hulle aktiwiteite verhoog potensiaal en lei daartoe dat boere beter rentmeesters van die grond word. Dit lei tot beleggings in grondgesondheid, wat tot minder benadeling van die omgewing lei, wat weer tot veiliger voedselproduksie en stoorstelsels aanleiding gee. Dit verbeter waterbewaringspraktyke, wat tot ingeligte onkruidbeheer en gebruik van chemikalieë lei, wat winsgewendheid verhoog.

Boere se opleiding is nie 'n vereiste wat eiesoortig aan ontwikkelende boere is nie. Alle boere het trouens deurlopende opleiding nodig om in die snel-ontwikkelende omgewing by te bly. Daar is deurlopend nuwe verwikkelinge in tegnologie, wetenskap en ondernemingsbestuur. Boerdery vereis 'n wye verskeidenheid kennis en kundigheid. Deesdae is praktiese kennis alleen nie genoeg nie. In die Suid-Afrikaanse konteks is ontwikkelende boere dikwels nuwe toetreders of is nie aan moderne boerderymetodes, onderwysgeleenthede of vaardigheidsontwikkeling blootgestel nie. Met die winsmarges onder uiterste druk is daar geen ruimte vir foute nie. Opleiding help boere om die jongste wetenskaplike vordering en tegnologie by hulle daaglikse bedrywighede te inkorporeer en verseker dat ontwikkelende boere nie onder dié is wat agtergelaat word nie.

#NoFarmerLeftBehind

Ons opleidingskursusse sluit teoretiese en praktiese sessies oor 'n wye reeks onderwerpe in wat gestruktureer is in kursusse wat deur ons vennote geborg word. Die opleiding word in die taal van die boere aangebied en word ontwerp om 'n onmiddellike impak op hulle boerdery, werkswinkelbestuurskennis en plantproduksievermoëns te maak. Die gereelde terugvoer van die boere verseker ons voortdurend dat ons hulle op 'n betekenisvolle manier toerus en bemagtig.

- Die kursusse wat ons ontwikkel het, is goed ontwerp en gegrond op die terugvoer van studente en opleiers oor die opleiding wat nodig is.
- Kursusse wat deur die Graan SA Landbou-ontwikkelingsprogram aangebied word, gaan oor bemagtiging deur die verwerwing van kennis en vaardigheidsontwikkeling.

- The farmers need target-oriented information which is relevant to their operations and will fast-track them into becoming better farmers.
- Attending the training courses has proven to be beneficial and empowering for developing farmers, contractors and agricultural extension officers alike.

Although we have been certified and accredited by the AgriSETA, the goal of our training programme is to further equip self-employed farmers and workers in the agricultural sector. We aim to offer relevant training courses at easily accessible venues, to farmers in the language of the particular region where the courses are held. Our course facilitators will be selected according to their technical skills and language competency, for example in Sesotho, Setswana, IsiXhosa, IsiZulu, English and Afrikaans.

Each attendee receives a take-home copy of the course manual to use as a reference after the training has been completed. There is a need for further funding to translate some of the existing training manuals into more languages.

A total number of 408 courses have been presented during this budget period and they were attended by a total of 10 821 farmers, farm workers and farming contractors.

The following table reflects the course schedule for all the courses which have been developed and presented to Grain SA farmers during the period 1 October 2017 to 12 September 2018:

- Die boere het teiken-georiënteerde inligting nodig wat op hulle bedrywighede betrekking het en wat hulle vinnig in beter boere sal laat ontwikkel.
- Die bywoning van opleidingskursusse is voordelig en bemagtigend vir ontwikkelende boere, kontrakteurs en landbouvoorligters.

Hoewel ons deur die AgriSETA gesertifiseer en geakkrediteer word, is die doel van ons opleidingsprogram om boere in eie diens en werkers in die landbousektor verder toe te rus. Ons beoog om tersaaklike opleidingskursusse vir boere by maklik toeganklike venues aan te bied in die taal van die betrokke streek waar die kursusse aangebied word. Ons kursusfasiliteerders word gekies op grond van hulle tegniese vaardighede en taalbevoegdheid, byvoorbeeld in Suid-Sotho, Tswana, Xhosa, Zulu, Engels en Afrikaans.

Elkeen wat 'n kursus bywoon, ontvang 'n afskrif van die kursushandleiding om huis toe te neem en as verwysing te gebruik nadat die opleiding voltooi is. Daar is 'n behoefte aan verdere befondsing om sommige van die bestaande handleidings in meer tale te vertaal.

'n Totaal van 408 kursusse is tydens hierdie begrotingstydperk aangebied, en dit is deur 10 821 boere, plaaswerkers en plaaskontrakteurs bygewoon.

Die volgende tabel toon die kursusskedule vir al die kursusse wat ontwikkel is en in die tydperk van 1 Oktober 2017 tot 12 September 2018 vir Graan SA-boere aangebied is:

Course name Kursusnaam	Donor Skenker	Courses Kursusse	Attendees Teenwoordig
Farming for profits	Winter Cereal Trust/Wintergraantrust	2	15
Inleiding tot Koringproduksie: Deel 1	Winter Cereal Trust/Wintergraantrust	1	5
Introduction to Wheat Production	Winter Cereal Trust/Wintergraantrust	4	27
Life Skills	Winter Cereal Trust/Wintergraantrust	2	27
Practical Skills Course: Planter and Boom Sprayer Calibration	Winter Cereal Trust/Wintergraantrust	2	10
Safe Handling of Tools and Farm Equipment	Winter Cereal Trust/Wintergraantrust	7	106
Tractor Maintenance: Part 2	Winter Cereal Trust/Wintergraantrust	1	9
Tractor Maintenance: Part 1	Winter Cereal Trust/Wintergraantrust	2	15
Trekker-instandhouding: Deel 2	Winter Cereal Trust/Wintergraantrust	1	4
Veilige Hantering van Gereedskap en Plaastoerusting	Winter Cereal Trust/Wintergraantrust	1	6
Workshop Skills (Hand tools)	Winter Cereal Trust/Wintergraantrust	2	8
Workshop Skills (Power tools)	Winter Cereal Trust/Wintergraantrust	1	7
Workshop Skills (Welding)	Winter Cereal Trust/Wintergraantrust	6	25
		32	**264**
Course name Kursusnaam	**Donor Skenker**	**Courses Kursusse**	**Attendees Teenwoordig**
Canola Production	Oil and Protein Seeds Development Trust/Olie- en Proteïensade-ontwikkelingstrust	**2**	**13**
Course name (one day courses) Kursusnaam (eendagkursusse)	**Donor Skenker**	**Courses Kursusse**	**Attendees Teenwoordig**
Introduction to Dry Bean Production	DST/DWT	87	1 540
Nixtamilization	DST/DWT	108	951
Nutrition: Different Food Groups	DST/DWT	92	1 319
		287	**3 810**

Course name Kursusnaam	Donor Skenker	Courses Kursusse	Attendees Teenwoordig
Basic Engine Repair	AgriSETA	1	8
Introduction to Groundnut Production	AgriSETA	1	23
Introduction to Maize Production	AgriSETA	5	95
Introduction to Soybean Production	AgriSETA	1	0
Introduction to Sunflower Production	AgriSETA	1	14
Tractor and Farm Implement Maintenance	AgriSETA	2	16
Workshop Skills (Welding)	AgriSETA	1	6
		12	**162**

Course name Kursusnaam	Donor Skenker	Courses Kursusse	Attendees Teenwoordig
Advanced Maize Production and Marketing	Maize Trust/Mielietrust	4	90
Basic Engine Repair	Maize Trust/Mielietrust	7	56
Business Ethics	Maize Trust/Mielietrust	3	74
Contractors Course	Maize Trust/Mielietrust	4	42
Farming for Profits	Maize Trust/Mielietrust	2	33
High Application Tractor Maintenance	Maize Trust/Mielietrust	1	17
Introduction to Maize Production	Maize Trust/Mielietrust	19	414
Mechanisation Management	Maize Trust/Mielietrust	2	16
Resource Assessment and Farm Planning	Maize Trust/Mielietrust	6	82
Tractor and Farm Implement Maintenance	Maize Trust/Mielietrust	14	257
Workshop Skills (Welding)	Maize Trust/Mielietrust	13	87
		75	**1 168**

FEEDBACK FROM SOME OF THE TRAINEES

Pumza Mtukushe

I have learned a lot in the theory part of the course, because there were more things I was not aware of and to go on the field and apply this knowledge you first have to understand the theory. At first I had a fear of not understanding what's going on because I have not driven a tractor to spray or plant a crop, but the course and the trainer's explanations made it clear. I would like to thank the trainer for good work done and I wish he can present more courses in future.

I have learned a lot with regards to the practical side of the course. Eric was more practical; he took us to the field and applied the theory he taught us. I can go to farmers and apply this knowledge with confidence.

Bautu Ngum

I learned a lot to increase my understanding on the importance of the machine and its parts. Every little thing in the tractor needs to be taken care of and all nuts and bolts have to be checked and greased. Everything that needs lubrication has to be lubricated – whether with oil or grease it has to be done. No mistakes should be made. Your tractor is your treasure, use it well.

Practical: One very important thing on the practical side of the course is to learn that it is possible to calculate the time to determine at what pace we should work. This is important when doing contracting work and charging a fee. I also learned a lot about the calibration of different implements.

TERUGVOER VAN SOMMIGE VAN DIE STUDENTE

Pumza Mtukushe

Ek het baie in die teorie-gedeelte van die kursus geleer, want daar was baie dinge waarvan ek nie bewus was nie, en om in die landerye hierdie kennis te gaan toepas, moet jy eers die teorie verstaan. Ek het aan die begin 'n vrees gehad dat ek nie gaan verstaan wat aangaan nie want ek het nog nie 'n trekker bestuur om 'n gewas te bespuit of te plant nie, maar die kursus en die opleier se verduidelikings het dit duidelik gemaak. Ek wil die opleier vir die goeie werk bedank en ek hoop hy kan in die toekoms meer kursusse aanbied.

Ek het baie in die praktiese sy van die kursus geleer. Eric was meer prakties; hy het ons na die landerye geneem en die teorie toegepas wat hy aan ons geleer het. Ek kan na boere toe gaan en hierdie kennis met vertroue toepas.

Bautu Ngum

Ek het baie geleer om my begrip van die belangrikheid van die masjien en sy onderdele te verbeter. Elke klein dingetjie in die trekker moet versorg word en alle moere en boute moet nagegaan en gesmeer word. Alles wat smering nodig het, moet gesmeer word – of dit nou met olie of ghries is, dit moet gedoen word. Geen foute moet gemaak word nie. Jou trekker is jou skat. Gebruik dit goed.

Prakties: Een baie belangrike ding aan die praktiese kant van die kursus was om te leer dat dit moontlik is om die tydstip te bereken om te bepaal teen watter tempo ons moet werk. Dit is belangrik wanneer jy kontrakteurswerk doen en geld vra. Ek het ook baie oor die kalibrering van verskillende implemente geleer.

PROJECT: COMMUNICATIONS (*PULA IMVULA* MAGAZINE)

'This then is the job of development communication: To inform and motivate at the national, sectoral and project levels. The job of development communication is the process of development itself.' – NORA CRUZ QUEBRAL

The *Pula Imvula* magazine is a vibrant, colourful, sector specific publication, which is well received by the farmers who regularly provide feedback saying that they find the information timeous, relevant and easy to understand. It is also another reliable information package in the toolkit of the development officers who use it for discussions or to refer farmers to specific information.

The publication is an invaluable communication method which has the power to affect rapid knowledge transfer and reach thousands of farmers effectively on a monthly basis. It is an excellent tool to timeously deliver industry-relevant information to the farmers throughout South Africa.

This project furthermore effectively addresses national policy regarding development communication which holds that development communication is a way of raising consciousness and awareness amongst communities on issues pertaining to a better life for all.

Contributors to the project

- Maize Trust monthly eight pages – total budget.
- Winter Cereal Trust sponsors a quarterly four page addition to the Maize *Pula* (March, June, September and December).
- The Oil and Protein Seeds Development Trust sponsors a quarterly four page addition to the Maize *Pula* (April, July, October and January).
- Individual input suppliers sponsor an additional eight pages in the English *Pula* in which more technical articles, particularly from the *SA Graan/Grain* magazine, are translated into English.

In the year under review we have managed to prepare, translate, duplicate and distribute the monthly newsletter in seven languages, viz. English, Afrikaans, Sesotho, Setswana, Sesotho sa Leboa, IsiXhosa and IsiZulu to developing farmers and other role-players, e.g. extension officers and mentors. We have spread the publication as widely as possible through all print and digital platforms available, to ensure the messages are carried into study group discussions and advanced farmer mentoring.

Currently the publication is distributed in seven languages: English, Afrikaans, Sesotho, Setswana, Sesotho sa Leboa, IsiZulu and IsiXhosa, to 17 097 readers.

Here are the 2017/2018 *Pula* distribution statistics per language:

PROJEK: KOMMUNIKASIE (*PULA IMVULA*-TYDSKRIF)

"Dit is dan die taak van ontwikkelingskommunikasie: Om op nasionale, sektorale en projekvlak in te lig en te motiveer. Die taak van ontwikkelingskommunikasie is dus die proses van ontwikkeling self." – NORA CRUZ QUEBRAL

Die *Pula Imvula*-tydskrif is 'n lewenskragtige, kleurvolle, sektorspesifieke publikasie wat goed ontvang word deur die boere, wat gereeld terugvoer verskaf dat hulle die inligting tydig, relevant en maklik vind om te verstaan. Dit is nóg 'n betroubare inligtingspakket in die toerusting van die ontwikkelingsbeamptes, wat dit vir besprekings gebruik, of wat boere vir spesifieke inligting daarheen verwys.

Die publikasie is 'n waardevolle kommunikasiemetode wat die vermoë het om vinnige kennisoordrag te laat plaasvind en duisende boere op 'n maandelikse grondslag doeltreffend te bereik. Dit is 'n uitstekende instrument om bedryfsrelevante inligting tydig aan boere regoor Suid-Afrika te verskaf.

Hierdie projek hanteer verder nasionale beleid oor ontwikkelingskommunikasie waarvolgens ontwikkelingskommunikasie 'n manier is om bewustheid onder gemeenskappe te verhoog oor kwessies wat op 'n beter lewe vir almal betrekking het.

Bydraers tot die projek

- Mielietrust borg agt bladsye elke maand – totale begroting.
- Wintergraantrust borg 'n kwartaallikse vierbladsy-bylae tot die Mielie *Pula* (Maart, Junie, September en Desember).
- Die Olie- en Proteïensade-ontwikkelingstrust borg 'n kwartaallikse vierbladsy-bylae tot die Mielie *Pula* (April, Julie, Oktober en Januarie).
- Individuele insetverskaffers borg 'n verdere agt bladsye in die Engelse *Pula* waarin meer tegniese artikels, veral uit die *SA Graan/Grain*-tydskrif, in Engels vertaal word.

In die oorsigjaar het ons daarin geslaag om die maandelikse nuusbrief in sewe tale, naamlik Engels, Afrikaans Suid-Sotho, Tswana, Sesotho sa Leboa, Xhosa en Zoeloe, op te stel, te vertaal, te dupliseer en aan ontwikkelende boere en ander rolspelers soos voorligtingsbeamptes en mentors te versprei. Ons het die publikasie deur middel van alle druk- en digitale platforms so wyd as moontlik versprei om seker te maak dat die boodskappe na studiegroepbesprekings en mentorskap van gevorderde boere oorgedra word.

Die publikasie word tans in sewe tale, Engels, Afrikaans Suid-Sotho, Tswana, Noord-Sotho, Zulu en Xhosa, aan 17 097 lesers versprei.

Hier is die 2017/2018 *Pula*-verspreidingstatistiek per taal:

English Engels	Afrikaans	Sesotho Suid-Sotho	Setswana Tswana	Sesotho sa Leboa Noord-Sotho	IsiZulu Zoeloe	IsiXhosa Xhosa	Total Totaal
1 645	417	1 441	1 619	240	5 302	6 433	17 097

From time to time we receive rather moving communications from the farmers which reaffirm the purpose and value of this monthly publication:

Ons ontvang van tyd tot tyd redelik aandoenlike kommunikasie van boere wat die doel en waarde van hierdie maandelikse publikasie herbevestig:

(6901620457082) Lindiwe Pinkie Khumalo
Cell no: 072 369 2043

We are grateful to receive the *Pula Imvula* magazine, because we are very much encouraged by this little book, which is packed with information. It keeps us going forward to reach our desire/goal of becoming a commercial farmer one day. We enjoy to read this book so much – there are even some farmers who each and every month ask when the next one is coming, because they want to know what is new in the next one. So please keep on sending them to us because they are of great help. It develops us as farmers and guides us on how to correctly plant and protect plants.

Thank you very much

From: vusi Mnyandu <vusimnyandu@gmail.com>
Date: 25 August 2018 at 04:21:39 SAST
To: <jerry@grainsa.co.za>
Subject: STATUS OF OUR POST OFFICE :SJAMEKTHULENI STUDY GROUP.

Good evening!

Since Friday last week til today has been a seriously difficult week in terms of movements due to strike hence have opted to communicate via e-mail.
May your office be kindly advised that there has been an administrative error about our post office box hence our magazines have been sent back but the problem has been rectified.
We would like also to confirm that these magazines are of great importance to the group. May your office resend them.

Sorry for inconvience.

Thanks

THE JOBS FUND PROJECT – FROM SUBSISTENCE TO ABUNDANCE

Together we are 'growing food, growing people and growing prosperity'.

This is a dynamic and highly rewarding four-year project which is currently being rolled out by the Grain SA Farmer Development Programme in partnership with:

- The Jobs Fund of the National Treasury
- Monsanto
- SA Lime and Gypsum
- Kynoch
- Syngenta
- Sasol Trust
- Villa Crop Protection
- Grain SA

We have just come to the end of the third year of this four-year project and it is almost inconceivable to think that this could be the last planting season. The 2017/2018 season has been good, although

DIE JOBS FUND-PROJEK – VAN BESTAAN TOT OORVLOED

Saam produseer ons voedsel, ontwikkel ons mense en skep ons welvaart.

Dit is 'n dinamiese en uiters lonende vierjaar-projek wat tans deur Graan SA Landbou-ontwikkelingsprogram bedryf word in vennootskap met:

- Die Jobs Fund van die Nasionale Tesourie
- Monsanto
- SA Kalk en Gips
- Kynoch
- Syngenta
- Sasol Trust
- Villa Crop Protection
- Graan SA

Ons het pas die einde van die derde jaar van hierdie vierjaar-projek bereik, en dit is amper ondenkbaar dat dit die laaste plantseisoen kan wees. Die 2017/2018-seisoen was goed, hoewel dalk nie so goed soos

perhaps not quite as good as the previous one. The table below shows the number of farmers and the hectares they have planted to date.

die vorige een nie. Die tabel hieronder toon die getal boere en die getal hektare wat hulle tot dusver geplant het.

Jobs Fund	2015/2016		2016/2017		2017/2018	
	Farmers Boere	ha	Farmers Boere	ha	Farmers Boere	ha
Mbombela, Mpumalanga	304	323	364	422,5	399	461
Louwsburg, Mpumalanga	191	246	401	1 020	585	1 076,25
Total/Totaal Mpumalanga	**495**	**569**	**765**	**1 442,5**	**984**	**1 537,25**
Louwsburg, KwaZulu-Natal	122	157	71	182	128	236
Dundee, KwaZulu-Natal	421	478	850	1 022,75	743	1 121
Total/Totaal KwaZulu-Natal	**543**	**635**	**921**	**1 204,75**	**871**	**1 357**
Kokstad, Eastern Cape/Oos-Kaap	221	231	458	466,25	755	842,75
Mthatha, Eastern Cape/Oos-Kaap	107	153	538	694	1 031	1 340
Maclear, Eastern Cape/Oos-Kaap	209	215	226	231,25	142	139,25
Total Eastern Cape/Totaal Oos-Kaap	**537**	**599**	**1 222**	**1 391,5**	**1 928**	**2 322**
Grand total for three provinces/ Groottotaal vir drie provinsies	**1 575**	**1 803**	**2 908**	**4 038,75**	**3 783**	**5 216,25**
Average yield/Gemiddelde opbrengs (t/ha)		**1,5**		**4,2**		
Increase in yield/Styging in opbrengs (%)				**280%**		
Increase in farmers/Toename in boere (%)			**184,63%**		**130,09%**	
Increase in ha/Toename in ha (%)			**224,00%**		**129,16%**	

Within the context of the different land tenure systems in South Africa, there are black farmers on communal land (former homelands which cover 18 million ha of land), hired private land, commonage land, own land as well as land which has been redistributed or restituted through the various reform programmes of the DRDAR.

The Farmer Development Programme of Grain SA has in the region of 9 500 black farmer members who all have access to some arable land – detailed information on each farmer is captured on the Grain SA data base. These farmers are divided into different categories: Subsistence (under 10 ha of arable land), smallholder farmers (from 10,5 ha to 100 ha of arable land), the potential commercial farmers (>100 ha arable land) and the new era commercial farmers (producing more than 250 tons per year).

This project is aimed at assisting the subsistence farmers in the communal areas of Mpumalanga, KwaZulu-Natal and the Eastern Cape to use the arable land that is available to them using the most modern, efficient and effective production practices so that each cultivated hectare produces the optimal yield possible in that area. The support to the farmers includes **training and mentoring** as well as access to **subsidised production inputs** where the **farmers will do the farming themselves**. The smaller farmers (starting at the subsistence level) use hand labour to plant their lands – small hand-held planters and knapsack sprayers are adequate to do the job. It is quite possible for these farmers to progress from the subsistence level to commercial production if they learn to use the correct inputs with modern production practices.

Through this initiative we are assisting small scale farmers to use the land that is available to them more productively. In the first year the farmers plant 1 ha, which increases every year with 0,5 ha until they reach the maximum of 10 ha. They then leave this programme and graduate to the smallholder farmer level where they need tractors and larger implements.

Binne die konteks van die verskillende grondbesitstelsels in Suid-Afrika is daar swart boere op kommunale grond (voormalige tuislande wat 18 miljoen ha grond beslaan), gehuurde privaat grond, dorpsgrond, eie grond en grond wat deur die DLOLH se verskillende hervormingsprogramme herverdeel of teruggegee is.

Graan SA se Landbou-ontwikkelingsprogram het ongeveer 9 500 swart boere as lede wat almal toegang tot bewerkbare grond het – gedetailleerde inligting oor elke boer word in die Graan SA-databasis vasgelê. Hierdie boere word in verskillende kategorieë verdeel: Bestaansboere (minder as 10 ha bewerkbare grond), kleinskaalse boere (vanaf 10,5 ha tot 100 ha bewerkbare grond), die potensiële kommersiële boere (>100 ha bewerkbare grond) en die nuwe era-boere (wat meer as 250 ton per jaar produseer).

Hierdie projek is daarop gemik om die bestaansboere in die kommunale gebiede van Mpumalanga, KwaZulu-Natal en die Oos-Kaap te help om die bewerkbare grond wat tot hulle beskikking is, te gebruik om die modernste, doeltreffendste en effektiefste produksiepraktyke toe te pas sodat elke bewerkte hektaar die optimale opbrengs wat vir daardie gebied moontlik is, kan produseer. Die steun aan die boere sluit in **opleiding en mentorskap**, asook toegang tot **gesubsidieerde produksie-insette** waar die **boere self die boerdery sal hanteer**. Die kleiner boere (vanaf bestaansvlak) gebruik handearbeid om hulle landerye aan te plant – klein handplanters en rugsaksproeiers is voldoende om die werk te doen. Dit is heeltemal moontlik vir hierdie boere om van die bestaansvlak tot kommersiële vlak te vorder as hulle leer om die regte insette met moderne produksiepraktyke te gebruik.

Deur hierdie inisiatief help ons kleinskaalse boere om die grond wat tot hulle beskikking is, meer produktief te bewerk. In die eerste jaar plant die boere 1 ha, wat elke jaar met 0,5 ha toeneem totdat hulle die maksimum van 10 ha bereik. Hulle verlaat dan hierdie program en vorder na die kleinskaalse vlak waar hulle trekkers en groter implemente nodig het.

Progress

The increases in the farmers' contribution have been as follows:

Vordering

Die styging in die boere se bydrae was soos volg:

Year Jaar	2015/2016	2016/2017	2017/2018	2018/2019
Farmer contributions/Boere se bydrae	R3 633 750	R8 601 622	R14 802 964	R25 500 000
Actual increase/Werklike styging		R4 967 872	R6 201 341	R10 697 036
		136,71%	72,10%	72%

For the next season we have changed the funding model, because we realised that many farmers were quitting the programme because they had to pay a higher percentage of the input costs. For the 2018/2019 season, the farmers are contributing R3 500 per ha.

This project is no small undertaking and requires intensive administration and management and sometimes a good deal of passion for the cause. Planning a project on paper and actually implementing it are different matters entirely. Simply the logistics of getting 215 interlinks delivered to these areas is a huge challenge – the roads are not geared for these large lorries, the farmers do not have their own transport to move the inputs and there is an ever present challenge of theft and crime which all have to be managed.

The administration – to reconcile the payment from 3 800 farmers whose literacy levels are generally low; to ensure that the correct references have been used; to ensure that the number of hectares purchased etc is all correct – is a huge task in itself. The large numbers of documents that are required is challenging and keep our mentors fully occupied during peak times. To do this for one single farmer is not difficult, but to do it for all the farmers in all the regions (who do not have access to information systems) is a huge challenge. This is a concern as it interrupts the mentor-mentee relationship and inhibits the transfer of knowledge which should be taking place during contact sessions with the farmer. The mentors are with the farmers on a very regular basis – to ensure that they all receive the correct inputs, to train them to use the inputs well and to ensure that they are doing the right thing in the field.

Project wins

- This programme has managed to bring together the rural farmers (resource-poor farmers), government and the private sector. It is the first time in the grain sector that we have managed to involve these different sectors.
- Grain SA managed to strike a very good deal on knapsack sprayers (R210 each) and we have bought 1 000 sprayers which we will be selling to the farmers at cost. Rovic Leers, a big supplier of mechanisation to the industry, offered the sprayers at a huge discount. Being able to do your own weed control puts the farmer in control of the weeds which, if neglected, devastate the crop.
- The fact that the farmers in this programme plant the most modern hybrids (Roundup Ready and BT) means that the fall armyworm, which has invaded large parts of South Africa, did not affect the crop at all. The BT maize offers natural resistance to the worms. Other neighbouring farmers who do not use this seed were able to experience the benefits of buying the good inputs and we believe that a large number of new farmers will in the coming season want to join the programme as they have witnessed the benefits.
- We have managed to get funding from the Department of Science and Technology to train farmers on basic nutrition, dry beans production and the process of Nixtamilization (a process used in the America's to unlock more of the protein contained in maize).

Ons het die befondsingsmodel vir die volgende seisoen aangepas omdat ons besef het dat talle boere die program verlaat omdat hulle 'n groter persentasie van die insetkoste moet betaal. Vir die 2018/2019-seisoen dra die boere R3 500 per ha by.

Hierdie projek is beslis nie 'n klein een nie en vereis intensiewe administrasie en bestuur en soms heelwat passie vir die saak. Die beplanning van 'n projek op papier en die werklike implementering daarvan is twee heeltemal verskillende sake. Die blote logistiek om 215 *interlinks* insette aan hierdie gebiede te lewer, is 'n groot uitdaging – die paaie is nie vir hierdie groot vragmotors gemaak nie, die boere het nie hulle eie vervoer om die insette te vervoer nie en daar is die immer-teenwoordige uitdaging van diefstal en misdaad wat bestuur moet word.

Die administrasie om die betaling vanaf 3 800 boere wie se geletterdheidsvlakke gewoonlik laag is, te rekonsilieer om te verseker dat die regte verwysings gebruik is, om te verseker dat die getal hektare wat bewerk gaan word alles korrek is, is op sigself 'n reusetaak. Die groot hoeveelheid dokumente wat nodig is, is uitdagend en hou ons mentors in piektye voltyds besig. Dit is nie moeilik om dit vir een boer te doen nie, maar om dit vir al die boere in al die streke (wat nie toegang tot inligtingstelsels het nie) te doen, is 'n geweldige uitdaging. Dit is kommerwekkend, aangesien dit die verhouding tussen mentor en mentee onderbreek en die oordrag van kennis beperk wat tydens die kontaksessies met die boer moet plaasvind. Die mentors besoek die boere op 'n baie gereelde grondslag om te verseker dat hulle al die regte insette ontvang, om hulle op te lei om die insette goed te gebruik en om seker te maak dat hulle die regte ding op die lande doen.

Projek-mylpale

- Hierdie program het dit reggekry om die landelike boere (wat 'n gebrek aan hulpbronne het), die regering en die privaat sektor byeen te bring. Dit is die eerste keer dat ons dit in die graansektor regkry om hierdie verskillende sektore te betrek.
- Graan SA het dit reggekry om 'n baie goeie prys vir rugsakspuite te beding (R210 elk) en ons het 1 000 spuite aangekoop wat ons teen kosprys aan die boere sal verkoop. Rovic Leers, 'n groot verskaffer van meganisering aan die bedryf, het die spuite teen 'n geweldige afslag aangebied. Die boer wat sy eie onkruidbeheer kan doen, is in beheer van die onkruid wat, indien dit onbeheer gelaat word, die gewas kan vernietig.
- Die feit dat die boere in hierdie program die modernste basters (Roundup Ready en Bt) plant, beteken dat die herfskommandowurm wat groot dele van Suid-Afrika besmet glad nie die gewas aantas nie. Die Bt-mielies bied natuurlike weerstand teen die wurms. Ander bure wat nie hierdie saad gebruik nie, kan die voordele ervaar om die goeie insette aan te koop, en ons glo dat 'n groot getal nuwe boere in die komende seisoen by die program sal wil aansluit nadat hulle die voordele gesien het.
- Ons het dit reggekry om befondsing by die Departement Wetenskap en Tegnologie te kry om boere oor basiese voeding, droëboneproduksie en die proses van Nixtamilization ('n proses wat in Amerika gebruik word om meer van die proteïen in mielies te ontsluit) op te lei.

- We have also managed to obtain funding to provide each of the farmers with 1 kg of dry bean seed. We hope to be able to encourage farmers to grow these higher protein crops in their little gardens so as to improve the level of protein in the diets of the family. As the farmers' skills improve, we are able to introduce them to other crops which are more difficult to manage than maize. Maize is the staple and it is good to learn about production through growing maize.
- Courses were presented on nutrition and dry bean production. As the farmers progress in terms of production, we felt it necessary to start focusing on aspects of household nutrition – there used to be a problem with the sourcing of the staple (maize), but thanks to this programme, the farmers are producing more maize than they require for household consumption. With this achievement they have access to the staple, which made it possible for us to start teaching them to balance their diets (particularly with protein which is one of the most expensive aspects of a diet). We will be providing the farmers with bean seed for production in their home gardens for the next season – hence the training on bean production.
- We have held the 'train the trainer' sessions on the Nixtamilization process and we were most impressed by the way in which the 20 ladies (representatives from six regions) were able to assimilate the process with regards to the preparation of food (preparing food that is not foreign to our people, while also including the process that will make more protein and calcium available from the maize).

Project woes

- Timeous delivery of inputs: This remains a challenge – the logistics of getting inputs delivered to the deep rural areas (in the rainy season).
- The threshing process: This process is also slow for these farmers as much is done by hand or by using small threshing machines.
- Fencing of land: Co-operation with the Department of Agriculture and Rural Development with regards to the fencing of land in the communal areas would help the farmers greatly. The poor rural farmers are not able to carry the huge costs of fencing their land.
- Nutrition: Farmers are greatly advantaged now in that they have access to the staple (maize) for both their households as well as the domesticated livestock. However, it is necessary to teach them about balanced nutrition (which will lead to increased interest in other crops).
- Reporting and monitoring tools: Working with subsistence farmers is complicated because many of them are nearly illiterate. When designing the reporting and monitoring tools, this must be borne in mind. We are experiencing challenges with regards to the farmer calendars and the requirement that the farmers should record the days they have worked per month. (More than 43 000 documents have been uploaded to the Grain SA Farmer Development website as part of the tier-one evidence).
- Poor roads: In the deep rural areas the poor condition of roads make the delivery of inputs challenging. The commercial sector makes use of 34 ton interlinks which require good roads. The challenge of poor roads should be brought to the attention of the authorities.
- Farmers leaving the programme: From the number of farmers that fall out because they are required to pay a higher percentage of the input costs, we feel the structure of the programme should be thoroughly interrogated. It is believed that this sector of rural farmers might require a percentage subsidy from government for a long period. They are truly poor farmers, who need the income from the crop to meet their daily household requirements.

- Ons het dit ook reggekry om befondsing te verkry om aan elke boer 1 kg droëboonsaad te verskaf. Ons hoop om boere aan te moedig om hierdie hoërproteïengewasse in hulle tuine te kweek om die vlak van proteïene in die gesin se dieet te verbeter. Namate die boere se vaardighede verbeter, kan ons hulle bekendstel aan ander gewasse wat moeiliker is om te bestuur as mielies. Mielies is die stapelvoedsel en dit is goed om van produksie te leer deur mielies te verbou.
- Kursusse oor voeding en droëboonproduksie is aangebied. Namate die boere ten opsigte van produksie vorder, voel ons dit is nodig om te begin om op aspekte van huishoudelike voeding te fokus – daar was voorheen 'n probleem met die verkryging van die stapelvoedsel (mielies), maar danksy hierdie program produseer boere meer mielies as wat hulle vir huishoudelike verbruik nodig het. Met hierdie prestasie het hulle toegang tot die stapelvoedsel, en dit het dit vir ons moontlik gemaak om hulle te begin leer om hulle dieet te balanseer (veral met proteïen, wat een van die duurste aspekte van 'n dieet is). Ons sal aan die boere bonesaad verskaf om in die volgende seisoen in hulle tuine te plant – vandaar die opleiding oor boneproduksie.
- Ons het 'opleiding vir die opleier'-sessies oor die Nixtamilization-proses gehou en was baie beïndruk met die manier waarop die 20 dames (verteenwoordigers uit ses streke) die proses ten opsigte van die voorbereiding van kos (voorbereiding van kos wat nie vir ons mense vreemd is nie, terwyl dit ook die proses insluit wat meer proteïen en kalsium uit die mielies beskikbaar te stel) kon assimileer.

Projekteleurstellings

- Tydige lewering van insette: Dit bly 'n uitdaging – die logistiek om insette in die afgeleë landelike gebied te laat aflewer (in die reënseisoen).
- Die dorsproses: Hierdie proses is ook stadig vir hierdie boere, aangesien heelwat met die hand of met klein dorsmasjiene gedoen word.
- Omheining van grond: Samewerking met die Departement van Landbou en Landelike Ontwikkeling ten opsigte van die omheining van grond in die gemeenskaplike gebiede sal die boere baie help. Die arm landelike boere kan nie die geweldige koste dra om hulle grond te omhein nie.
- Voeding: Boere word baie bevoordeel omdat hulle nou toegang tot die stapelvoedsel (mielies) vir hulle huishouding sowel as vir die mak vee het. Dit is egter nodig om hulle oor gebalanseerde voeding te leer (wat tot groter belangstelling in ander gewasse sal lei).
- Verslagdoenings- en moniteringsinstrumente: Dit is ingewikkeld om met bestaansboere te werk, omdat talle van hulle feitlik ongeletterd is. Wanneer die verslagdoenings- en moniteringsinstrumente ontwerp word, moet dit in gedagte gehou word. Ons ervaar uitdagings ten opsigte van die boerderykalenders en die vereiste dat die boere die dae wat hulle elke maand werk, moet aanteken. (Meer as 43 000 dokumente is as deel van die vlak 1-bewyse op die Graan SA Landbouontwikkeling-webwerf opgelaai.)
- Swak paaie: In die afgeleë landelike gebiede maak die swak toestand van die paaie die lewering van insette uitdagend. Die kommersiële sektor gebruik 34 ton-*interlinks*, wat goeie paaie vereis. Die uitdaging van swak paaie moet onder die aandag van owerhede gebring word.
- Boere wat die program verlaat: As gevolg van die getal boere wat onttrek omdat hulle 'n groter persentasie van die insetkoste moet betaal, voel ons dat die struktuur van die program deeglik ondersoek moet word. Daar word geglo dat hierdie sektor van plattelandse boere moontlik vir 'n lang tydperk 'n persentasie subsidie van die regering kan benodig. Hulle is uiters arm boere wat die inkomste uit die gewas nodig het om in hulle daaglikse huishoudelike behoeftes te voorsien.

- The safe storage of maize: The safe storage of maize for own use and for the market is crucial to the entire maize chain. Most subsistence farmers keep the maize on the cob until they need it – this affords the fungi and bacteria time for growth. We are embarking on a process to try to acquire safe storage tanks for farmers. Most families need 1 ton of maize for own use for the year and a cost-effective storage tank stores 5 tons (at a cost of R40 000). We are looking to government and other partners for assistance in this project.

One project, many partnerships

It must to be mentioned with great appreciation that this project has been made possible because of an incredible network made up of many partnerships. Our team members in the field have identified needs, we've mentioned those needs and in no time at all we would get feedback that that issue was being addressed by one of the partners.

The founding partners of this platform 'from subsistence to abundance', namely Grain SA Farmer Development, The Jobs Fund, The Sasol Agricultural Trust, Monsanto, Africa Lime Industries, Kynoch, Syngenta and Villa Crop, have created a vehicle onto which other donors could link to become part of something greater. This collaboration has achieved something truly special which is the birth of new hope for developing farmers at subsistence and smallholder levels.

- The Department of Science and Technology facilitated the following:
  - Cob cages for the safer storage of maize.
  - Training on safe storage of maize and the dangers of mycotoxins.
  - Training on household nutrition.
  - Training on dry bean production.
  - Supply of 1 kg of dry bean seed for each farmer in the programme for the 2018/2019 production season.
  - Training on the process of Nixtamilization (treatment of dry maize with slaked lime which reduces toxins, makes more protein available and facilitates the use of maize in many dishes).
  - Threshing machines, scales and bag stitching machines (so as to enable the farmers to thresh the maize quickly, package the maize and weigh it accurately and stitch the bags closed as is the standard in the industry).
- Santam Agri supplied the following:
  - GPS devices for use by the mentors.
  - The purchase of threshing machines for the farmers.
- Sasol Base Chemicals donated the following:
  - 25 sets of threshing machines, scales and handheld bag-sewing machines for the farmers.
- The Department of Rural Development and Agrarian Reform in the Eastern Cape provided:
  - 19 interns to work on the project.
  - Money for engaging contractors to assist the farmers to plant 3 656 ha.
- Monsanto also kindly gave each farmer a rain gauge so that they can measure their rainfall and capture this information in their diaries.

Comment

This project had a positive impact on so many lives. It has changed the face of subsistence and small scale agriculture and brought renewed hope to some of the most rural and impoverished corners of this country. We need to urgently impress upon policy makers that this is an initiative that is good and right and must continue.

- Die veilige stoor van mielies: Die veilige stoor van mielies vir eie gebruik en vir die mark is noodsaaklik vir die hele mielieketting. Die meeste bestaansboere hou die mielies op die kop totdat hulle dit nodig het, en dit gee aan die swamme en bakterieë tyd om te groei. Ons begin met 'n proses om te probeer om veilige stoortenks vir boere te bekom. Die meeste gesinne het 1 ton mielies vir eie gebruik vir 'n jaar nodig, en 'n kostedoeltreffende stoortenk stoor 5 ton (teen 'n koste van R40 000). Ons is op soek na regerings- en ander vennote vir hulp met hierdie projek.

Een projek, talle vennootskappe

Daar moet met groot waardering gemeld word dat hierdie projek moontlik gemaak word deur 'n ongelooflike netwerk van talle vennootskappe. Ons spanlede in die veld het geïdentifiseerde behoeftes. Ons meld hierdie behoeftes, en voor ons ons oë kan uitvee, kry ons terugvoer dat die kwessie deur een van die vennote hanteer word.

Die stigtervennote van hierdie platform, van bestaan tot oorvloed, naamlik Graan SA Landbou-ontwikkeling, die Jobs Fund, die Sasol Landboutrust, Monsanto, Africa Lime Industries, Kynoch, Syngenta en Villa Crop, het 'n medium geskep waarmee ander skenkers kan skakel om deel van iets groters te word. Hierdie samewerking het iets werklik spesiaals bereik, naamlik nuwe hoop vir ontwikkelende boere op bestaans- en kleinskaalse vlak.

- Die Departement Wetenskap en Tegnologie het die volgende gefasiliteer:
  - Kophokke vir die veiliger stoor van mielies.
  - Opleiding oor die veilige stoor van mielies en die gevare van mikotoksiene.
  - Opleiding oor huishoudelike voeding.
  - Opleiding oor droëboonproduksie.
  - Verskaffing van 1 kg droëboonsaad vir elke boer in die program vir die 2018/2019-produksieseisoen.
  - Opleiding oor die proses van Nixtamalization (behandeling van droë mielies met gebluste kalk, wat toksiene verminder, meer proteïen beskikbaar stel en die gebruik van mielies in talle geregte vergemaklik).
  - Dorsmasjiene, skale en saktoewerkmasjiene (sodat boere hulle mielies vinnig kan dors, dit kan verpak en akkuraat weeg en die sakke kan toewerk volgens die standaard in die bedryf).
- Santam Agri het die volgende verskaf:
  - GPS-toestelle vir gebruik deur die mentors.
  - Die aankoop van dorsmasjiene vir die boere.
- Sasol Base Chemicals het die volgende geskenk:
  - 25 stelle dorsmasjiene, skale en hand-saktoewerkmasjiene vir die boere.
- Die Departement van Landelike Ontwikkeling en Landbouhervorming in die Oos-Kaap het die volgende verskaf:
  - 19 interns om aan die projek te werk.
  - Geld om kontrakteurs aan te stel om die boere te help om 3 656 ha aan te plant.
- Monsanto het ook goedgunstiglik aan elke boer 'n reënmeter gegee sodat hulle hulle reënval kan meet en hierdie inligting in hulle dagboeke kan aanteken.

Kommentaar

Hierdie projek het 'n positiewe impak op soveel lewens gehad. Dit het die aansig van bestaans- en kleinskaalse landbou verander en nuwe hoop vir sommige van die mees afgeleë en verarmde uithoeke van hierdie land gebring. Ons moet beleidmakers dringend daarvan bewus maak dat hierdie inisiatief goed en reg is en voortgesit moet word.

GRAIN SA INTERNSHIP PROGRAMME IN PARTNERSHIP WITH DRDAR

An expert in anything was once a beginner!

We need to change perceptions that college graduates only have 'head knowledge' and are not able to assist with practical solutions in the field. We believe there are many knowledgeable graduates from agricultural colleges who can be empowered further to make a difference in the sector if they are given the opportunity to gain more experience by getting involved in the field and learning first-hand from experts. We know this both builds confidence and increases insight and knowledge.

It is also true that one of the challenges Grain SA Farmer Development has is finding competent mentors for the ever expanding programme – especially those willing to work in deep rural areas where the need is great. We are eager 'to cultivate' young mentors who share our passion for land transformation and sustainable farmer development through an internship programme like this.

We see the benefit as being twofold:

1. The interns gain relevant experience, which builds their confidence and empowers them so they are equipped and positioned to apply for good jobs.
2. Grain SA Farmer Development is given the opportunity to train the calibre of mentors we need in the field for future farmer development.

In November 2016 Grain SA Farmer Development team members approached the Provincial Department of Agriculture for their assistance with more mechanisation for the farmers being mentored by them. During this discussion the idea of an internship programme was born. The goal would be that **19 graduates in agriculture would be employed and become members of the Grain SA Farmer Development team as interns**. This programme would then run in conjunction with the mechanisation contributed to the programme by the Department. The interns' objective is to gain practical experience with the primary focus being grain production and farmer development.

The exposure will include practical experience, where the Interns will be hands-on doing the following themselves and then teaching other farmers to do:

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

The interns will also participate in training and will assist with Grain SA farmer training courses in grain production. Other learning and skills development experience will be acquired during the Grain SA social facilitation tasks which include study group meetings, farmers days and advanced farmer encounters.

Interns will participate in administrative and reporting activities and will benefit from computer training and skills development through:

- Accurate record keeping.
- Log book maintenance.
- Detailed accountability for reporting to all our partners.

The key role played by the DRDAR is to:

1. Fund the mechanisation made available to Grain SA Farmer Development for the farmers.
2. Contribute to the stipend received by the graduates who are appointed as interns with Grain SA.

GRAAN SA-INTERNSKAPPROGRAM IN VENNOOTSKAP MET DIE DLOLH

'n Kundige op enige gebied was eens op 'n tyd 'n beginner!

Ons moet persepsies verander dat kollegegegradueerdes net "kopkennis" het en nie met praktiese oplossings in die veld kan help nie. Ons glo dat daar talle kundige gegradueerdes uit landboukolleges is wat verder bemagtig kan word om 'n verskil in die sektor te maak as hulle die geleentheid gegun word om meer ervaring te verkry deur in die veld betrokke te raak en eerstehands by kundiges te leer. Ons weet dit bou selfvertroue en verhoog insig en kennis.

Dit is ook waar dat een van die uitdagings van Graan SA Landbou-ontwikkeling is om bevoegde mentors te kry vir die program wat voortdurend uitbrei – veral diegene wat bereid is om in afgeleë landelike gebiede te werk waar die behoefte groot is. Ons is gretig om deur 'n internskapprogram hierdie jong mentors te "kweek" wat ons passie vir grondhervorming en volhoubare landbou-ontwikkeling deel.

Ons beskou die voordeel as tweeledig:

1. Die interns verwerf relevante ervaring, wat hulle selfvertroue bou en hulle bemagtig sodat hulle toegerus en geposisioneer is om vir goeie werk aansoek te doen.
2. Graan SA Landbou-ontwikkeling kry die geleentheid om die kaliber mentors op te lei wat ons vir toekomstige landbou-ontwikkeling in die veld nodig het.

In November 2016 het Graan SA se Landbou-ontwikkeling-spanlede die provinsiale Departement van Landbou genader om hulp met meer meganisering vi die boere wat deur hulle gementor word. Tydens hierdie gesprek is die idee van 'n internskapprogram gebore. Die doel is dat **19 gegradueerdes in landbou as interns aangestel word deur en lede van die Graan SA Landbou-ontwikkeling-span word**. Hierdie program sal dan bedryf word saam met die meganisering wat deur die departement tot die program bygedra word. Die interns se doelwit is om praktiese ervaring op te doen, met graanproduksie en landbou-ontwikkeling as hulle primêre fokuspunt.

Die blootstelling sal praktiese ervaring insluit, met die interns wat self die volgende doen en dan ander boere leer om dit te doen:

- Planterkalibrering
- Balkspuitkalibrering
- Kartering van grond met behulp van GPS
- Instandhouding van plaastoerusting
- Oesopbrengsskattings

Die interns sal ook aan opleiding deelneem en met Graan SA se boeropleidingskursusse in graanproduksie help. Ander leer- en vaardigheidsontwikkelingervaring sal verwerf word tydens Graan SA se sosiale fasiliteringstake, wat studiegroepvergaderings, boeredae en ontmoetings met gevorderde boere insluit.

Interns sal aan administratiewe en verslagaktiwiteite deelneem en by rekenaaropleiding en vaardigheidsontwikkeling baat deur middel van:

- Akkurate rekordhouding.
- Hou van 'n logboek.
- Gedetailleerde aanspreeklikheid vir verslagdoening aan al ons vennote.

Die sleutelrol wat deur die DLOLH gespeel word, is om:

1. Die meganisering te befonds wat vir die boere aan Graan SA Landbou-ontwikkeling beskikbaar gestel word.
2. By te dra tot die toelae wat die gegradueerdes wat as interns by Graan SA aangestel word, ontvang.

The key role of Grain SA Farmer Development is to:

1. Conduct overall supervision and monitoring of the interns through Grain SA's development managers in the province.
2. Enable interns by assigning them to accompany experienced mentors in conducting their daily tasks.
3. Interns will be given specific tasks and be monitored and coached by mentors.
4. Mentors will continue carrying out their duties with one or two Interns assigned to them.
5. Every Friday, weekly reports are submitted to the provincial co-ordinator for assessment.

Project progress

Sticks in a bundle are unbreakable – together we are making a difference.

We are pleased to report that the DRDAR and Grain SA Farmer Development Programme have already signed a five-year memorandum of understanding which started in the 2017/2018 season – so we are already about to embark on the second year of this inspiring project. The interns have made the most of every opportunity presented them so far in the programme. It is clear that they are excited by the learning interventions they are being exposed to. They express particular appreciation for the hands-on experience they are getting in practical aspects of farming and farm management. The general response shows their growing confidence in their own ability to visit other farmers and make recommendations to them.

We have had such positive feedback from the project so far, that both partners have been convinced that through this joint approach we could **unlock job creation, commercialise rural farmers quicker, and ensure engaged youth involvement** in the agricultural sector.

#TogetherWeMakeADifference! We are not shy to say we are very excited to be part of growing the youth in the agricultural sector.

GRAIN SA'S SCHOOLS PROGRAMME

The global population is expected to increase to 9 billion by 2050 with the youth, aged between 15 to 24 years, making up at least 14% of this total. According to the Food and Agriculture Organisation, rural youth are the key to future food security. The dilemma we face is that around the world few young people see a future for themselves either in agriculture or in living in rural areas. It is a fact that most of the world's food is produced by smallholder farmers who are ageing – and older farmers are less likely to adopt new technologies, which are necessary for sustainable farming in a changing world exacerbated by issues like growing populations and climate change.

Howard Blight, founder of Agricolleges International, says one of the major misconceptions that needs to be addressed is that the youth still perceive agriculture to be an 'old-fashioned' industry. In reality access to technology, information and better communication, together with improved equipment are changing the way we think and the way things are done. There is therefore an urgent need to engage youth in agriculture. Youth engagement can only happen if there are visionary policymakers who create opportunities for young people to be informed in a way that they see value and hope in the sector. Young people need to be able to see themselves as part of an agricultural evolution which will guide and sustain themselves and their communities into the future.

Die sleutelrol van Graan SA Landbou-ontwikkeling is om:

1. Algehele toesig oor die interns te hou en hulle te moniteer deur middel van Graan SA se ontwikkelingsbestuurders in die provinsie.
2. Interns te bemagtig deur hulle toe te wys om ervare mentors te vergesel wat hulle daaglikse take uitvoer.
3. Aan interns spesifieke take te gee en hulle deur mentors te laat moniteer en afrig.
4. Mentors toe te laat om hulle pligte uit te voer met een of twee interns wat aan hulle toegewys word.
5. Elke Vrydag weeklikse verslae vir evaluering aan die provinsiale bestuurder voor te lê.

Projekvordering

Stokke in 'n bondel is onbreekbaar – saam maak ons 'n verskil.

Ons is ook trots om te rapporteer dat die DLOLH en Graan SA se Landbou-ontwikkelingsprogram reeds 'n vyfjaar-memorandum van verstandhouding onderteken het wat in die 2017/2018-seisoen begin het. Ons begin dus reeds met die tweede jaar van hierdie inspirerende projek. Die interns het elke geleentheid wat tot dusver in die program aan hulle verskaf is, optimaal benut. Dit is duidelik dat hulle opgewonde is oor die leergeleenthede waaraan hulle blootgestel word. Hulle spreek veral waardering uit oor die praktiese ervaring wat hulle opdoen ten opsigte van die alledaagse boerdery en plaasbestuur. Die algemene reaksie toon hulle toenemende vertroue in hulle eie vermoë om ander boere te besoek en aanbevelings aan hulle te maak.

Ons het tot dusver uiters positiewe terugvoer oor die projek ontvang, en albei vennote is oortuig dat ons deur middel van hierdie gesamentlike benadering **werkskepping kan ontsluit, landelike boere vinniger kan laat kommersialiseer, en die geïnteresseerde betrokkenheid van die jeug in die landbousektor kan verseker**.

#TogetherWeMakeADifference! Ons is nie skaam om te sê dat ons baie opgewonde is om die jeug in die landbousektor te laat groei nie.

GRAAN SA SE SKOLEPROGRAM

Die wêreldbevolking sal na verwagting teen 2050 tot 9 miljard gegroei het, met jongmense tussen 15 en 24 jaar oud wat ten minste 14% van hierdie totaal sal uitmaak. Volgens die Voedsel- en Landbou-organisasie is die landelike jeug die sleutel tot toekomstige voedselsekerheid. Die dilemma waarvoor ons te staan kom, is dat min jongmense regoor die wêreld vir hulleself 'n toekoms in landbou of in landelike gebiede sien. Dit is 'n feit dat die meeste van die wêreld se voedsel geproduseer word deur kleinskaalse boere wat besig is om te verouder – en ouer boere is minder geneig om nuwe tegnologie te aanvaar, wat vir volhoubare boerdery in 'n veranderende wêreld nodig is. Die uitdaging word deur kwessies soos groeiende bevolkings en klimaatverandering vererger.

Howard Blight, stigter van Agricolleges International, sê een van die groot wanopvattings wat hanteer moet word, is dat jongmense landbou steeds as 'n outydse bedryf beskou. In werklikheid is toegang tot tegnologie, inligting en beter kommunikasie, tesame met beter toerusting, besig om die manier te verander waarop ons dink en waarop dinge gedoen word. Daar is dus 'n dringende behoefte om jongmense by landbou te betrek. Jongmense se betrokkenheid kan net verkry word as daar visionêre beleidmakers is wat vir jongmense geleenthede skep om ingelig te bly op 'n manier wat hulle die waarde van en hoop vir die sektor laat besef. Jongmense moet hulleself as deel beskou van 'n landbou-evolusie wat hulle en hulle gemeenskappe in die toekoms sal lei en volhoubaar sal maak.

The driving motivation behind the Schools Programme initiative is two-fold:

1. We identified a need to educate future consumers about the complexities of the agricultural sector so they will become informed consumers.
2. We became aware of the need to alert learners to potential careers in the sector.

During the budget year under discussion a total of 361 visits, sponsored by the Maize Trust and AgriSETA, were made by trained Grain SA Farmer Development facilitators during the first, second and third terms of 2018.

Feedback

- Teacher, Mr Dlamini of Macingwane High School, said he felt the learners had learned that most food consumed comes from agriculture and were able to understand that there are a number of careers to pursue in agriculture. He said they would appreciate it if learners could receive pamphlets with information they have seen from the video clips – also with names of careers to pursue in a particular field of production.
- Learner, Tshabalala Nokulunga, said: This visit was of great value to me, because I've learnt a lot about agriculture. I learnt about food from which grains and cereals are made, learned about tuberous plants, vegetables, fruits, nuts, beverages, cotton and fibre. I also learned about cotton fibre that is grown by farmers, food from animals like cows that produce meat and milk. Pigs produce pork meat from which sausages are made. Clothes like shirts, skirts, T-shirts and so on are made from fibres like cotton. Sheep produce wool from which jerseys, hats, scarfs, gloves and socks are made.

Conclusion

In today's world of dynamic growth and rapid change, the 'business as usual' approach no longer applies in any sector – and least of all in a multi-faceted, multi-functional agricultural environment. If attention is not paid to farmer development on all levels, we will never be able to claim opportunity for all and neither will we declare there was **#NoFarmerLeftBehind**. Small scale farmers and developing commercial farmers must be supported by an enabling environment, which includes favourable policies and investments. We must continue to pursue agro-ecological approaches, the empowerment of women in agriculture and the education and equipping of our youth. If we hope to meet the increased demand for nutritious, affordable and safe food which is produced in an environmentally and socially sustainable manner, then both agricultural and farmer development must be a priority for the sake of a brighter, food secure future for all.

Die dryfveer agter die skoleprograminisiatief is tweeledig:

1. Ons het 'n behoefte geïdentifiseer om toekomstige verbruikers op te voed oor die kompleksiteite van die landbousektor sodat hulle ingeligte verbruikers kan word.
2. Ons het bewus geword van die behoefte om leerders van potensiële loopbane in die sektor bewus te maak.

Tydens die begrotingsjaar – in die eerste, tweede en derde kwartaal van 2018 – is 'n totaal van 361 besoeke, geborg deur die Mielietrust en AgriSETA, deur opgeleide Graan SA Landbou-ontwikkeling-fasiliteerders gemaak.

Terugvoering

- Mnr Dlamini, 'n onderwyser van die Macingwane Hoërskool, sê hy voel die leerders het geleer dat die meeste kos wat verbruik word uit landbou kom, en hulle kon dus verstaan dat daar 'n aantal loopbane is wat in landbou gevolg kan word. Hy sê hulle sal dit waardeer as leerders pamflette kan ontvang met die inligting wat hulle in videosnitte sien – ook met die loopbane wat hulle op 'n spesifieke produksiegebied kan volg.
- 'n Leerder, Tshabalala Nokulunga, sê: Hierdie besoek was vir my van groot waarde, want ek het baie oor landbou geleer. Ek het geleer oor kos wat van graan gemaak word, oor knolplante, groente, vrugte, neute, drankies, katoen en vesel. Ek het ook geleer oor katoenvesel wat deur die boere gekweek word, kos van diere soos koeie, wat vleis en melk produseer. Varke produseer varkvleis, waarvan wors gemaak word. Klere soos hemde, T-hemde ensovoorts word van vesel soos katoen gemaak. Skape produseer wol, waaruit truie, hoede, serpe, handskoene en sokkies gemaak word.

Slot

In vandag se wêreld van dinamiese groei en vinnige verandering geld die benadering van "sake soos gewoonlik" nie meer in enige sektor nie – en minste van almal in die veelfasettige, multifunksionele landbou-omgewing. Indien daar nie op alle vlakke aan landbou-ontwikkeling aandag geskenk word nie, sal ons nooit vir almal geleenthede kan verskaf nie, en sal ook nie kan sê **#NoFarmerLeftBehind** nie. Kleinskaalse boere en ontwikkelende kommersiële produsente moet deur 'n bemagtigende omgewing ondersteun word wat gunstige beleide en beleggings insluit. Ons moet voortgaan om landbou-ekologiese benaderings te volg, vroue in landbou te bemagtig en ons jeug op te voed en toe te rus. As ons die groter vraag na voedsame, bekostigbare en veilige kos wat op 'n omgewings- en maatskaplik-volhoubare manier geproduseer word, wil bevredig, moet landbou- en boere-ontwikkeling die prioriteit wees ter wille van 'n helderder, voedselveilige toekoms vir ons almal.

1 Nico Vermaak
MANAGER: CORPORATE SERVICES
BESTUURDER: KORPORATIEWE DIENSTE

2 Elda-Beth van den Berg
SECRETARY
SEKRETARESSE

3 Coretha Usher
HUMAN RESOURCES OFFICER
MENSEHULPBRONNEBEAMPTE

4 Clarissa Chinian
RECEPTIONIST
ONTVANGSKLERK

5 Nydia Odendaal
COMMITTEE OFFICER
KOMITEEBEAMPTE

6 Eva Lehabe
OFFICE CLERK/MESSENGER
KANTOORKLERK/BODE

7 Louisa Mohlala
CLEANER
SKOONMAKER

STRATEGIC FOCUS AREAS

- Administrative support for Congress, the Executive and staff
- Meeting the information technology needs of the Grain SA Group
- Human resources management
- Partnership with funders

STRATEGIESE FOKUSAREAS

- Administratiewe steun vir Kongres, Hoofbestuur en personeel
- Voorsien in die inligtingstegnologie-behoeftes van die Graan SA Groep
- Menslikehulpbronbestuur
- Vennootskap met befondsers

HIGHLIGHTS

- Congress 2018.
- Executive function and farewell to retired Executive members.
- Recommendations regarding conflicting interests as policy for Grain SA.
- Amendments to Grain SA's Constitution.

HOOGTEPUNTE

- Kongres 2018.
- Hoofbestuursfunksie en afskeid van uitgetrede Hoofbestuurslede.
- Aanbevelings oor botsende belange as beleid vir Graan SA.
- Wysigings aan die Graan SA-grondwet.

BUILDING A PROFITABLE GRAIN INDUSTRY

BOU 'N WINSGEWENDE GRAANBEDRYF

Congress, the Executive and Executive Committee

ANNUAL CONGRESS

The annual Congress took place at NAMPO Park on 7 and 8 March 2018. The Congress was constituted, with a total of 374 delegates, representing 32 grain producing regions.

The Congress theme focused on 'Building blocks towards profitability'. Delegates discussed the following themes:

- The seven wonders of grain production – Prof Fred Below (Professor of Plant Physiology, Department of Crop Sciences, University of Illinois).
- International export and value adding opportunities to the South African grain and oilseeds industry – Ronald Jetten (Head of South Africa for China National Cereals, Oils and Foodstuffs Corporation [COFCO] South Africa (Pty) Ltd – a member of COFCO International).

Kongres, Hoofbestuur en Dagbestuur

JAARLIKSE KONGRES

Die jaarlikse Kongres het op 7 en 8 Maart 2018 by NAMPO Park plaasgevind. Die Kongres is gekonstitueer met 'n totaal van 374 afgevaardigdes, wat 32 graanproduserende streke verteenwoordig het.

Die Kongrestema het gefokus op "Boublokke na winsgewendheid". Afgevaardigdes het die volgende temas bespreek:

- Die sewe wonders van graanproduksie – prof Fred Below (Professor in Plantfisiologie, Departement van Gewaswetenskap, Universiteit van Illinois).
- Internasionale uitvoer- en waardetoevoegingsgeleenthede vir die Suid-Afrikaanse graan- en oliesadebedryf – Ronald Jetten (Hoof van Suid-Afrika vir China National Cereals, Oils and Foodstuffs Corporation [COFCO] South Africa (Edms) Bpk – 'n lid van COFCO International).

THE GRAIN SA LEADERS WHO FACILITATED CONGRESS 2018: RAMODISA MONAISA (VICE-CHAIRPERSON), NICO VERMAAK (MANAGER: CORPORATE SERVICES), JACO MINNAAR (CHAIRPERSON), JANNIE DE VILLIERS (CEO) AND DEREK MATHEWS (VICE-CHAIRPERSON).

DIE LEIERS VAN GRAAN SA WAT DIE 2018 KONGRES GEFASILITEER HET: RAMODISA MONAISA (VISEVOORSITTER), NICO VERMAAK (BESTUURDER: KORPORATIEWE DIENSTE), JACO MINNAAR (VOORSITTER), JANNIE DE VILLIERS (HUB) EN DEREK MATHEWS (VISEVOORSITTER).

DELEGATES TOOK PART IN ROUND TABLE DISCUSSIONS.

AFGEVAARDIGDES HET AAN RONDETAFELGESPREKKE DEELGENEEM.

THE SPEAKERS AT CONGRESS WERE PROF FRED BELOW, PROF GUY MIDGLEY, RONALD JETTEN, PROF MOHAMMAD KARAAN AND BRAND PRETORIUS.

DIE SPREKERS OP DIE KONGRES WAS PROF FRED BELOW, PROF GUY MIDGLEY, RONALD JETTEN, PROF MOHAMMAD KARAAN EN BRAND PRETORIUS.

- Climate resilience – Prof Guy Midgley (Stellenbosch University).
- Policy environment for future sustainable commercial and developing grain production – Prof Mohammad Karaan (Agricultural Economist).
- Inspirational speaker – Brand Pretorius (Retired Chief Executive of McCarthy Limited).

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.

RECOGNITION TO ROLE-PLAYERS IN THE GRAIN VALUE CHAIN

During Congress recognition was given to:

- Partners for the Farmer Development Programme
  - Monsanto – Kobus Steenekamp
  - Pioneer – Heinz Oellermann
  - Pannar – Nick Goble
  - CORTEVA AgriScience – Tony Esmeraldo

- Klimaataanpasbaarheid – prof Guy Midgley (Universiteit Stellenbosch).
- Beleidsomgewing vir toekomstige volhoubare kommersiële en ontwikkelende graanproduksie – prof Mohammad Karaan (Landbou-ekonoom).
- Inspirasiespreker – Brand Pretorius (afgetrede Uitvoerende Hoof van McCarthy Beperk).

Groepbesprekings na 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:

- Vennote van die Landbou-ontwikkelingsprogram
  - Monsanto – Kobus Steenekamp
  - Pioneer – Heinz Oellermann
  - Pannar – Nick Goble
  - CORTEVA AgriScience – Tony Esmeraldo

- AFGRI
- Sasol Base Chemicals – Dr Erik Adriaanse
- Maize Trust – Dr Sandile Ndlungwane
- The mentors for the Farmer Development Programme.
- Johan van den Berg for his dedication to analyse long and short term climate trends.
- Fanie van Zyl for pioneering work done by him to establish sound management practices in Grain SA. He was Executive member from 2002 to 2012 in Grain SA's Region 3 and Chairperson of the Audit Committee from 2006 to 2018.
- Industry role-players for 20 years of service to the grain and oilseeds industry:
  - South African Grain Laboratory (SAGL) – Wiana Louw
  - South African Grain Information Systems (SAGIS) – Nico Hawkins
  - Maize Trust – John Purchase
  - Sorghum Trust – Anton Nebe
  - Oil and Protein Seeds Development Trust (OPDT) – Gerhard Keun
  - Winter Cereal Trust – Ishmael Tshiame

- AFGRI
- Sasol Base Chemicals – dr Erik Adriaanse
- Mielietrust – dr Sandile Ndlungwane
- Die mentors van die Landbou-ontwikkelingsprogram.
- Johan van den Berg vir sy toewyding om lang- en korttermyn-klimaatstendense te ontleed.
- Fanie van Zyl vir baanbrekerswerk wat hy gedoen het ten einde goeie bestuurspraktyke in Graan SA te vestig. Hy was vanaf 2002 tot 2012 Hoofbestuurslid in Graan SA se Streek 3 en vanaf 2006 tot 2018 Voorsitter van die Ouditkomitee.
- Bedryfsrolspelers vir 20 jaar se diens aan die graan- en oliesadebedryf:
  - Suider Afrikaanse Graanlaboratorium (SAGL) – Wiana Louw
  - Suid-Afrikaanse Graan Inligtingstelsels (SAGIS) – Nico Hawkins
  - Mielietrust – John Purchase
  - Sorghumtrust – Anton Nebe
  - Olie- en Proteïensade-ontwikkelingstrust (OPOT) – Gerhard Keun
  - Wintergraantrust – Ishmael Tshiame

PARTNERS IN THE GRAIN SA DEVELOPMENT PROGRAMME, WHO CO-FUND THE REGIONAL OFFICES THROUGHOUT SOUTH AFRICA, WERE ALSO ACKNOWLEDGED: DR SANDILE NDLUNGWANE (MAIZE TRUST), HEINZ OELLERMANN (PIONEER), NICK GOBLE (PANNAR), JANNIE DE VILLIERS AND RAMODISA MONAISA (BOTH FROM GRAIN SA, WHO PRESENTED THE CERTIFICATES), TONY ESMERALDO (CORTEVA AGRISCIENCE), DR ERIK ADRIAANSE (SASOL BASE CHEMICALS) AND KOBUS STEENEKAMP (MONSANTO).

VENNOTE IN DIE GRAAN SA-ONTWIKKELINGSPROGRAM WAT DIE STREEKSKANTORE REGDEUR SUID-AFRIKA HELP BEFONDS, HET OOK ERKENNING ONTVANG: DR SANDILE NDLUNGWANE (MIELIETRUST), HEINZ OELLERMANN (PIONEER), NICK GOBLE (PANNAR), JANNIE DE VILLIERS EN RAMODISA MONAISA (ALBEI VAN GRAAN SA, WAT DIE SERTIFIKATE OORHANDIG HET), TONY ESMERALDO (CORTEVA AGRISCIENCE), DR ERIK ADRIAANSE (SASOL BASE CHEMICALS) EN KOBUS STEENEKAMP (MONSANTO).

JOHAN VAN DEN BERG FROM SANTAM WAS ACKNOWLEDGED FOR HIS COMMITMENT TO ANALYSING SHORT AND LONG TERM CLIMATE TRENDS AND THEREFORE SUPPORTING PRODUCERS TO MAKE INFORMED DECISIONS.

JOHAN VAN DEN BERG VAN SANTAM HET ERKENNING ONTVANG VIR SY VERBINTENIS TOT DIE ONTLEDING VAN KORT- EN LANGTERMYN-KLIMAATTENDENSE EN DUS DIE ONDERSTEUNING VAN PRODUSENTE OM INGELIGTE BESLUITE TE NEEM.

FANIE VAN ZYL (CHAIRPERSON OF THE AUDIT COMMITTEE FROM 2006 TO 2018 AND EXECUTIVE MEMBER IN GRAIN SA'S REGION 3 FROM 2002 TO 2012) WAS RECOGNISED FOR THE PIONEERING WORK HE DID TO ESTABLISH SOUND MANAGEMENT PRACTICES IN GRAIN SA.

FANIE VAN ZYL (VOORSITTER VAN DIE OUDITKOMITEE VANAF 2006 TOT 2018 EN HOOFBESTUURSLID IN GRAAN SA SE STREEK 3 VANAF 2002 TOT 2012) HET ERKENNING ONTVANG VIR DIE BAANBREKERSWERK WAT HY GEDOEN HET TEN EINDE GOEIE BESTUURSPRAKTYKE IN GRAAN SA TE VESTIG.

INDUSTRY ROLE-PLAYERS RECEIVED RECOGNITION FOR 20 YEARS' SERVICE TO THE GRAIN AND OILSEEDS INDUSTRY: WIANA LOUW (SAGL), ANTON NEBE (SORGHUM TRUST), DR JOHN PURCHASE (MAIZE TRUST), GERHARD KEUN (OPDT), ISHMAEL TSHIAME (WINTER CEREAL TRUST) AND NICO HAWKINS (SAGIS). THE CERTIFICATES WERE PRESENTED BY JANNIE DE VILLIERS (CEO) AND JACO MINNAAR (CHAIRPERSON) OF GRAIN SA (BACK).

BEDRYFSROLSPELERS HET ERKENNING ONTVANG VIR 20 JAAR SE DIENS AAN DIE GRAAN- EN OLIESADEBEDRYF: WIANA LOUW (SAGL), ANTON NEBE (SORGHUMTRUST), DR JOHN PURCHASE (MIELIETRUST), GERHARD KEUN (OPOT), ISHMAEL TSHIAME (WINTERGRAANTRUST) EN NICO HAWKINS (SAGIS). DIE SERTIFIKATE IS DEUR JANNIE DE VILLIERS (HUB) EN JACO MINNAAR (VOORSITTER) VAN GRAAN SA (AGTER) OORHANDIG.

ATTENDANCE BY GUESTS AND MEDIA

Support of the news media and attendance by large numbers of guests and senior government officials were indicative that the Grain SA Congress is viewed as a highlight on the agricultural calendar. An estimated number of 600 persons attended the Congress at NAMPO Park.

THE EXECUTIVE AND EXECUTIVE COMMITTEE

The Executive Committee 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, namely 1 February, 8 March, 24 to 25 July and 27 September 2018.

A network with the grain value chain is maintained, with Executive members serving on several boards, 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 Executive Committee was elected after Congress by the Executive and comprises of the following members:

- Jaco Minnaar (Chairperson ex officio)
- Preline Swart (Vice-chairperson ex officio)
- Derek Mathews (Vice-chairperson ex officio)
- Anton Botha
- Chris Schoonwinkel
- Richard Krige
- Ramodisa Monaisa

The Executive Committee focuses on policy, strategic planning, financial and staff related matters and also deals with delegated powers when the Executive is not in session. During 2018 the Executive Committee met on 23 January, 11 and 12 April, 8 May, 14 June, 3 September, and 25 October.

A strategic planning session was completed by the Executive Committee and the Management Team in April 2018. 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 24 July 2018. 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.

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 600 persone het die Kongres by NAMPO Park bygewoon.

HOOFBESTUUR EN DAGBESTUUR

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 1 Februarie, 8 Maart, 24 tot 25 Julie en 27 September 2018.

'n Netwerk word met die graanwaardeketting gehandhaaf, met hoofbestuurslede wat in verskeie direksies, trusts, forums, tegniese komitees en 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 is ná die Kongres deur die Hoofbestuur gekies en bestaan uit die volgende lede:

- Jaco Minnaar (Voorsitter ex officio)
- Preline Swart (Visevoorsitter ex officio)
- Derek Mathews (Visevoorsitter ex officio)
- Anton Botha
- Chris Schoonwinkel
- Richard Krige
- Ramodisa Monaisa

Die Dagbestuur fokus op beleid, strategiese beplanning, finansiële en personeel-verwante sake, en hanteer ook gedelegeerde magte wanneer die Hoofbestuur nie in sitting is nie. Die Dagbestuur het in 2018 op 23 Januarie, 11 en 12 April, 8 Mei, 14 Junie, 3 September en 25 Oktober vergader.

'n Strategiese beplanningsessie is in April 2018 deur die Dagbestuur en die Bestuurspan gehou. Die resultate van die beplanningsessie 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 24 Julie 2018 by NAMPO Park gehou. Die aand het aan uitgetrede Hoofbestuurslede die geleentheid gegee om hul kollegas te groet en aan Graan SA om sy waardering aan hierdie uitgetrede Hoofbestuurslede te betoon.

JACO BREYTENBACH (REGION 19) RECEIVED THE AWARD FOR EXCELLENCE. THIS AWARD IS PRESENTED TO EXECUTIVE MEMBERS ANNUALLY FOR EXCELLENT SUPPORT AND SERVICE WITHIN THE EXECUTIVE.

JACO BREYTENBACH (STREEK 19) ONTVANG DIE TOEKENNING VIR UITNEMENDHEID. HIERDIE TOEKENNING WORD JAARLIKS GEMAAK AAN HOOFBESTUURSLEDE WAT UITSTEKENDE ONDERSTEUNING EN DIENS IN DIE HOOFBESTUUR GELEWER HET.

Recognition was given to:

- Cobus van Coller
- Fanie van Zyl
- Theo Ferreira (Apology)
- Gift Mafuleka (Apology)
- Emile de Klerk (Apology)
- Bart Harmse (Apology)

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 awarded to Jaco Breytenbach of Region 19.

Grain SA information technology

IT RELATED NETWORKS, DESKTOP SUPPORT AND IT SECURITY

A project was completed to investigate the quality and costing of the IT infrastructure service providers, to ensure that Grain SA uses the most cost effective and applicable solutions on all levels. The IT support and infrastructure services was transferred to Hambisana in March 2018.

GRAIN SA WEBSITE (*WWW.GRAINSA.CO.ZA*)

The Grain SA website is maintained by Thoughtcorp. A data management system for the Farmer Development section to support interactive management inputs from the various regions and mentors is maintained.

Staff management

STAFF TURNOVER

The staff turnover for the reporting period comprises two persons. The full staff corps numbers 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 2017 to March 2018. 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.

Erkenning is gegee aan:

- Cobus van Coller
- Fanie van Zyl
- Theo Ferreira (Verskoning)
- Gift Mafuleka (Verskoning)
- Emile de Klerk (Verskoning)
- Bart Harmse (Verskoning)

Toekenning vir uitnemendheid

Erkenning vir uitnemendheid word jaarliks aan 'n Hoofbestuurslid wat uitstekende ondersteuning en diens in die Hoofbestuur gelewer het, gegee. Hierdie jaar is die toekenning aan Jaco Breytenbach van Streek 19 gemaak.

Graan SA inligtingstegnologie

IT-VERWANTE NETWERKE, LESSENAARONDERSTEUNING EN IT-SEKURITEIT

'n Projek is goedgekeur om die gehalte en koste van alle IT-verwante diensverskaffers te ondersoek om te verseker dat Graan SA die kostedoeltreffendste en toepaslikste oplossings op alle vlakke gebruik. Die IT-ondersteuning en infrastruktuurdienste is in Maart 2018 aan Hambisana oorgedra.

GRAAN SA-WEBWERF (*WWW.GRAINSA.CO.ZA*)

Die Graan SA-webwerf word deur Thoughtcorp in stand gehou. 'n Databestuurstelsel vir die Landbou-ontwikkelingsafdeling om interaktiewe bestuursinsette van die onderskeie streke en mentors te ondersteun, word bygehou.

Personeelbestuur

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-, Lichtenburg-, Kokstad- en Dundee-kantore.

VAARDIGHEIDSONTWIKKELING EN OPLEIDING

'n Vaardigheidsontwikkelingsplan vir die tydperk April 2017 tot Maart 2018 is by die AgriSETA ingedien. Graan SA streef na die deurlopende ontwikkeling en bemagtiging van alle personeel en verskillende opleidingsgeleenthede en kursusse is vir personeel aangebied. 'n Vaardigheidsontwikkelingskomitee vergader elke kwartaal.

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 department heads. The results are taken into account by the Remuneration Committee.

PENSION FUND

An investigation for amendments to the pension fund scheme was completed. After membership consultation sessions, recommendations were referred to the Remuneration Committee for approval.

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 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 the external auditors of Grain SA (PricewaterhouseCoopers) are, where requested, submitted to support financial reporting.

Grain SA would like to express its gratitude to the Sasol 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:

- The term of office for office bearers.
- Proxy votes.
- Associate membership to external entities.

The Executive considered recommendations and referred them to the 2019 Congress for consideration.

Conclusion

The Corporate Services Department offers support at various levels to the Executive, Management and the staff team. New technology is increasingly used for more effective liaison with members.

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 Ondersoek vir wysigings aan die pensioenfondsskema is afgehandel. Ná ledekonsultasiesessies is aanbevelings vir goedkeuring na die Vergoedingskomitee verwys.

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 Trust voor. Tussentydse verslae word ingevolge die beleide en prosedures van die trusts aan die onderskeie trusts voorgelê. Feitelike bevindings deur die eksterne ouditeurs van Graan SA (PricewaterhouseCoopers) word, waar versoek, ingedien om finansiële verslagdoening te ondersteun.

Graan SA wil graag sy dank teenoor die Sasol Trust, die Wintergraantrust, die Mielietrust, die Sorghumtrust en die Olie- en Proteïensade-ontwikkelingstrust uitspreek vir hulle deurlopende steun aan verskeie Graan SA-projekte.

Grondwettaakspan

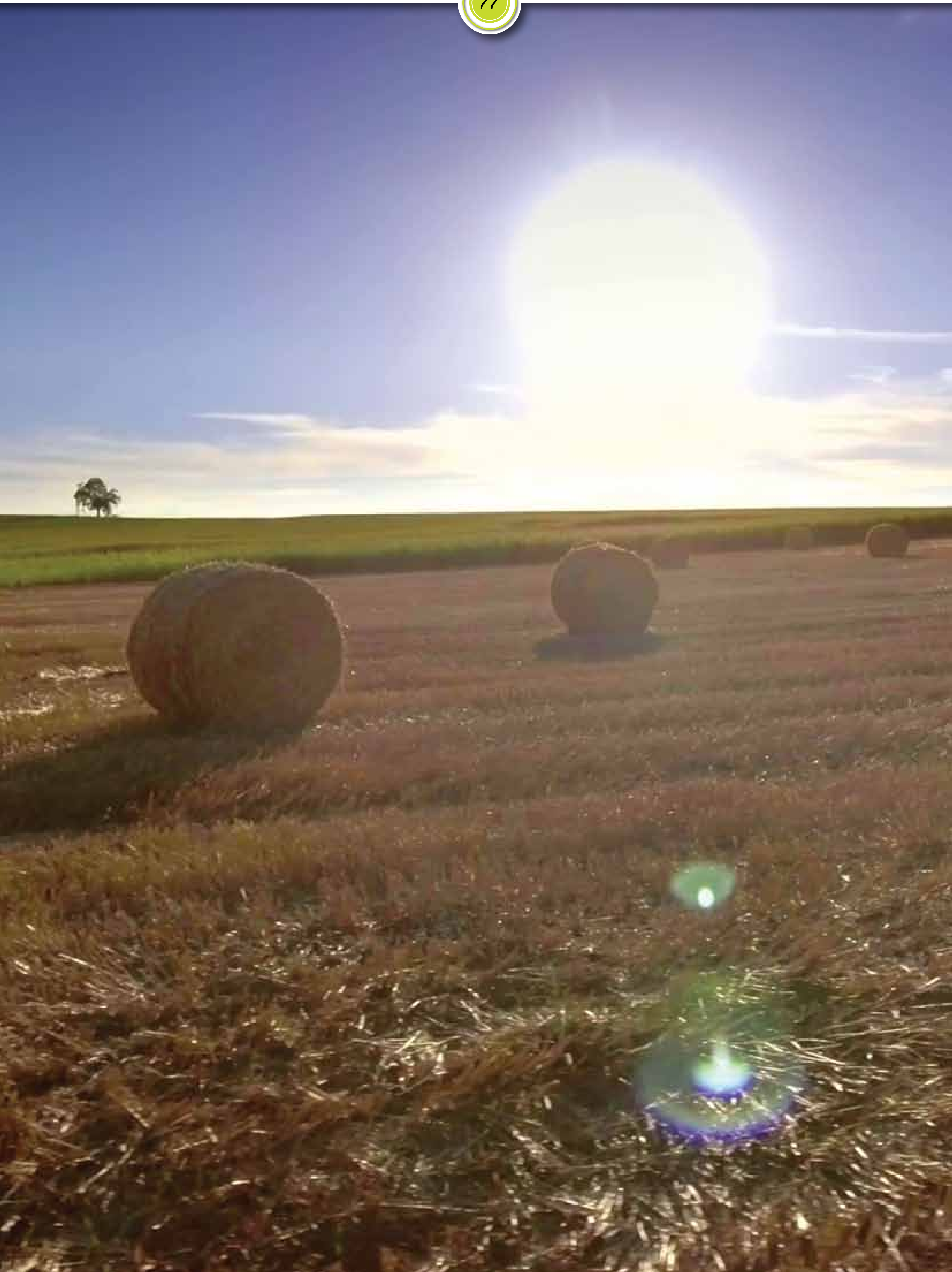
Grondwetlike wysigings is aangevra vir:

- Die ampstermyn van ampsdraers.
- Volmagstemme.
- Assosiaatlidmaatskap aan eksterne entiteite.

Die Hoofbestuur het aanbevelings oorweeg en dit na die 2019 Kongres verwys vir oorweging.

Slot

Die Departement Korporatiewe Dienste verskaf steun op verskeie vlakke aan die Hoofbestuur, Bestuur en die personeelspan. Nuwe tegnologie word toenemend vir meer doeltreffende skakeling met lede gebruik.



MOISTURE DEFICIENCY AFFECTS RESULTS

TEKORT AAN VOG AFFEKTEER RESULTATE

Production conditions in the 2017/2018 production season for summer grains and 2017/2018 season for winter grains

The 2017/2018 production season of summer grains to a great extent started out like the previous season, with an extremely unsteady planting time. Initially, early in the season, it rained reasonably well – which rekindled hope for the new season.

As the season progressed, long periods in the optimal planting window passed with insufficient rain for soil moisture and therefore planting could not take place optimally.

In the more western parts of the country (North West and the western Free State), a large part of the summer grain plantings took place outside the optimal plant window. In the eastern parts of the country there were – especially during December and January – challenging times with high heat units and a shortage of enough moisture. The result was damage to the crops in some areas where crops experienced quite a critical shortage of moisture during this period.

Regardless of the challenges facing the producers during the 2017/2018 production season, the average yields of most of the summer grains were reasonably good for the season. The maize took particularly long to dry this season, and harvesting took place until the end of September in certain areas of the country, while other parts had started planting new season maize already.

Most of the summer grain planting areas declined in the 2017/2018 season, measured against those of the 2016/2017 season – with only the areas of yellow maize, soybeans, groundnuts and dry beans being higher during the 2017/2018 season. The changes in the areas for summer grains planted in the 2017/2018 season, compared to those of the 2016/2017 season, are as follows: White maize: -23%, yellow maize: +6,6%, soybeans: +37%, sunflower seed: -5%, sorghum: -32%, groundnuts: +0,5% and dry beans: +18%.

To the Western Cape, which is the biggest winter grain producing region, the 2017/2018 season was an extremely challenging one in view of the drought conditions prevailing in the Western Cape. These conditions took their toll of the winter grains, and the production of wheat, barley and canola was under major pressure during the 2017/2018 season.

The total wheat production for the season was 20% lower than for the previous season, while that of barley and canola were 13% and 11% lower respectively. The area planted for malt barley as well as that for canola was higher for the 2017/2018 season than for the 2016/2017 season, while the production for both these crops was lower. This

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

Luan van der Walt
AGRICULTURAL ECONOMIST
LANDBOU-EKONOOM

Produksie-omstandighede in die 2017/2018-produksieseisoen vir somergrane en 2017/2018-seisoen vir wintergrane

Die 2017/2018-produksieseisoen van somergrane het tot 'n groot mate soos die vorige seisoen, met 'n uiters wankelrige planttyd, afgeskop. Dit het aanvanklik, vroeg in die plantseisoen, redelik goed gereën – wat hoop vir die nuwe seisoen laat opvlam het.

Namate die seisoen gevorder het, het daar lang tydperke in die optimale plantvenster verbygegaan waar daar nie genoeg reën was vir voldoende grondvog nie en aanplanting kon derhalwe nie optimaal plaasvind nie.

In die meer westelike gedeeltes van die land (Noordwes en Wes-Vrystaat) het 'n groot gedeelte van die somergraanaanplantings buite die optimale plantvenster plaasgevind. In die oostelike gedeeltes van die land was daar – veral tydens Desember en Januarie – uitdagende tye met hoë hitte-eenhede en tekorte aan genoeg vog. Dit het veroorsaak dat daar in sommige gedeeltes skade aan die gesaaides was wat gedurende hierdie tydperk 'n redelike kritiese tekort aan vog beleef het.

Ten spyte van die uitdagings wat tydens die 2017/2018-produksieseisoen aan die produsente gestel is, was die gemiddelde opbrengste van die meeste somergrane vir die seisoen redelik goed. Die mielies het in hierdie seisoen veral geweldig lank gevat om af te droog en daar is nog tot einde September toe in sekere gedeeltes van die land gestroop, terwyl ander gedeeltes reeds weer nuwe seisoen-mielies begin plant het.

Die meeste van die somergrane se aangeplante oppervlaktes in die 2017/2018-seisoen het afgeneem, gemeet teen dié van die 2016/2017-seisoen – met slegs die oppervlakte van geelmielies, sojabone, grondbone en droëbone wat hoër gedurende die 2017/2018-seisoen was. Die verandering in die oppervlaktes vir somergraan wat in die 2017/2018-seisoen aangeplant is, gemeet teen dié van die 2016/2017-seisoen is soos volg: Witmielies: -23%, geelmielies: +6,6%, sojabone: +37%, sonneblomsaad: -5%, sorghum: -32%, grondbone: +0,5% en droëbone :+18%.

Vir die Wes-Kaap, wat die grootste wintergraanproduserende streek is, was die 2017/2018-seisoen 'n uiters uitdagende seisoen met die droogtetoestande wat in die Wes-Kaap oorheers het. Hierdie omstandighede het sy tol op die wintergrane geëis en die produksie van koring, gars en kanola was almal tydens die 2017/2018-seisoen onder geweldige druk.

Die totale koringproduksie vir die seisoen was 20% laer as die vorige seisoen se produksie, terwyl dié van gars en kanola onderskeidelik 13% en 11% laer was. Die oppervlakte aangeplant van beide moutgars en kanola was vir die 2017/2018-seisoen hoër

makes the impact of the dry conditions on the crops cultivated mainly in the Western Cape very clear. However, the new winter grain season appears to be promising and the production conditions in the Western Cape are also considerably better than a year ago – which holds good prospects for the 2018/2019 season, which starts soon.

MAIZE

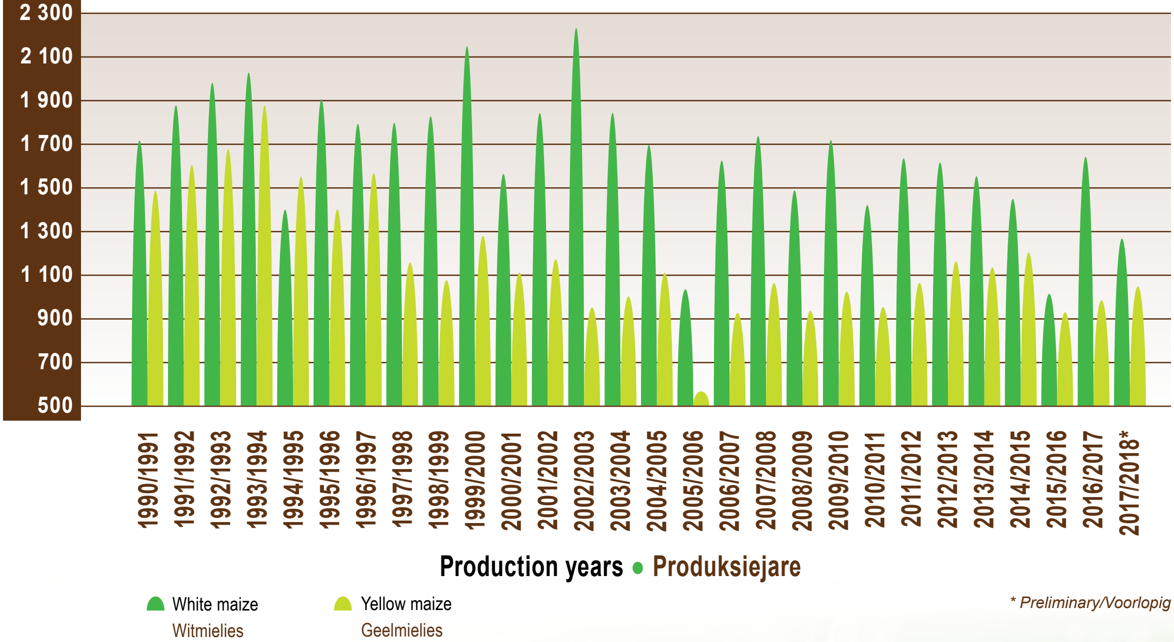
The total maize plantings for the 2017/2018 production season declined by about 310 000 ha (12%) from the previous season's planting. The biggest decrease in the area planted was that for white maize, which decreased by about 23% since the previous season, while the yellow-maize area increased by 6% for the season (see **Graph 1**). The difference in the plantings for white and yellow maize can be largely attributed to the price difference that occurred between these two crops in the course of the season. The previous season's record production caused the prices to start trading closer to export parity, and that is why a premium of between R100/ton and R120/ton higher than white maize was paid for yellow maize for the biggest part of the season. This encouraged the increase in the yellow-maize plantings, while there was a slight decrease in the area planted with white maize.

as vir die 2016/2017-seisoen, terwyl die produksie vir beide hierdie gewasse laer was. Dit maak die impak wat die droë omstandighede op die gewasse het wat hoofsaaklik in die Wes-Kaap verbou word, duidelik. Die nuwe wintergraanseisoen blyk egter belowend te wees en die produksieomstandighede in die Wes-Kaap is ook aansienlik beter as 'n jaar gelede – wat goeie vooruitsigte inhou vir die 2018/2019-seisoen wat eersdaags begin.

MIELIES

Die totale mielie-aanplantings vir die 2017/2018-produksieseisoen het met ongeveer 310 000 ha (12%) afgeneem vanaf die vorige seisoen se aanplantings. Die grootste afname in die oppervlakte aangeplant, was dié van witmielies wat met ongeveer 23% van die vorige seisoen afgeneem het, terwyl die geelmielie-oppervlakte vir die seisoen met ongeveer 6% toegeneem het (sien **Grafiek 1**). Die verskil in die aanplantings tussen wit- en geelmielies kan grootliks toegeskryf word aan die prysverskil wat deur die loop van die seisoen tussen hierdie twee gewasse voorgekom het. Die vorige seisoen se rekordproduksie het veroorsaak dat die pryse nader aan die uitvoerpariteit begin verhandel het en daarom is daar vir die grootste gedeelte van die seisoen 'n premie van tussen R100/ton en R120/ton bo witmielies vir geelmielies betaal. Dit het die toename in die geelmielie-aanplantings aangemoedig, terwyl daar 'n effense afname in aangeplante witmielie-oppervlakte was.

1 **Total area planted to maize**
Totale oppervlakte onder mielies

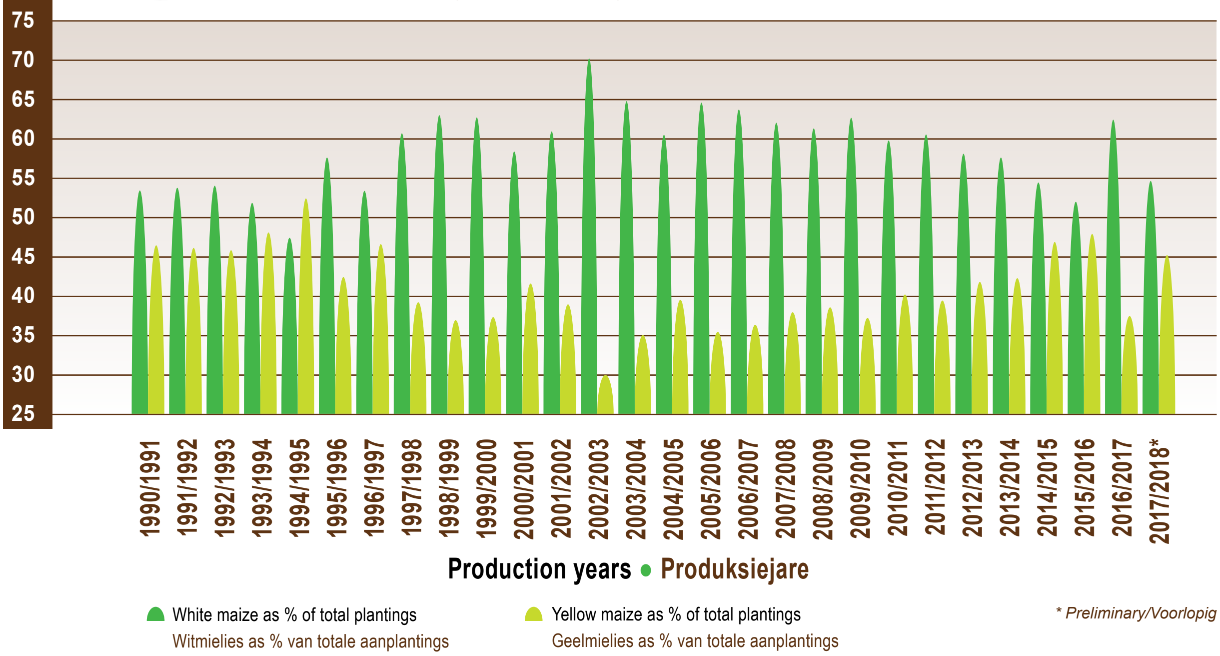


** Preliminary/Voorlopig*

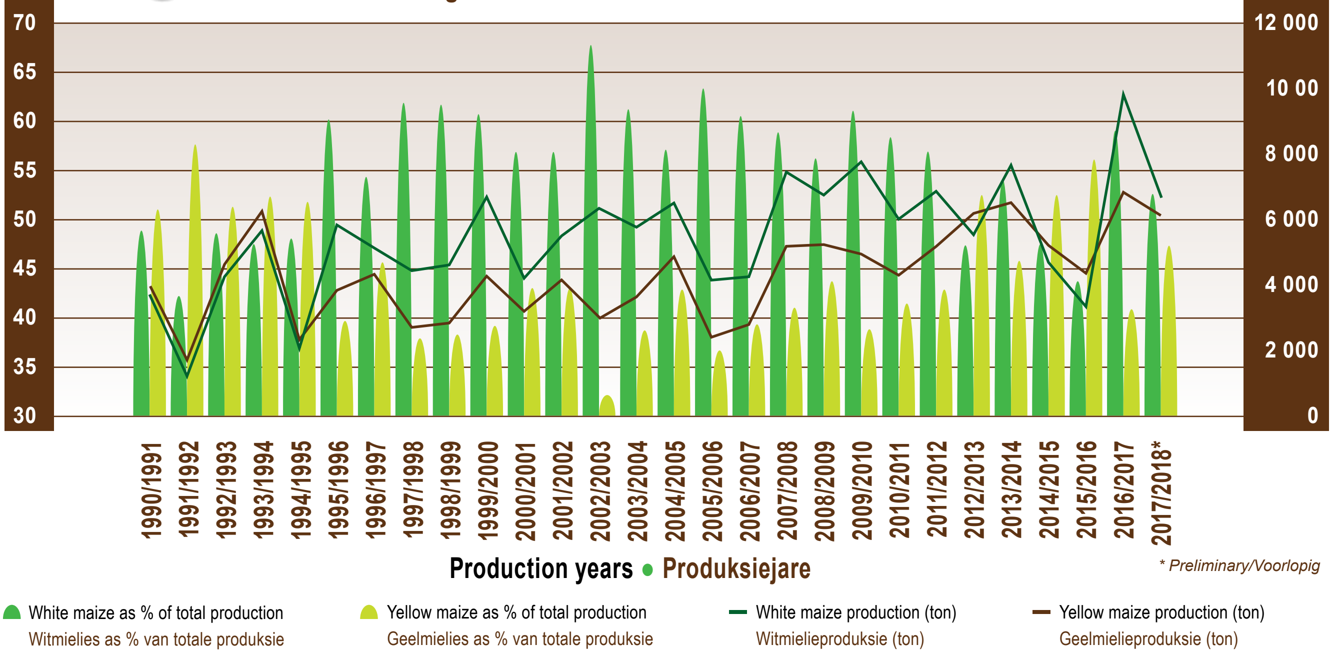
Graph 2 indicates the plantings of white and yellow maize from the 1990/1991 season until the 2017/2018 season as a percentage. In the 2017/2018 production season the white maize plantings contributed approximately 55% to the total area planted under maize, while the plantings of yellow maize covered 45% of the total hectares. In the previous season, white maize plantings contributed approximately 63% to the total area, while yellow maize accounted for 37% of the total area. **Graph 3** 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 2017/2018 season. It is clear that the ratio of production between white and yellow maize in the 2017/2018 season moved much closer to each other again, while the previous season's white maize production was considerably higher.

Grafiek 2 dui die aanplantings van wit- en geelmielies vanaf die 1990/1991-seisoen tot en met 2017/2018-seisoen as 'n persentasie aan. In die 2017/2018-produksieseisoen het die witmielie-aanplantings ongeveer 55% tot die totale oppervlakte onder mielies aangeplant bygedra, terwyl die aanplantings van geelmielies 45% van die totale hektare beslaan het. In die vorige seisoen het witmielie-aanplantings ongeveer 63% van die totale oppervlakte beslaan, terwyl geelmielies 37% van die totale oppervlakte beslaan het. **Grafiek 3** 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 2017/2018-seisoen. Dit is duidelik dat die verhouding van produksie tussen wit en geelmielies in die 2017/2018-seisoen weer baie nader aan mekaar beweeg het, terwyl die vorige seisoen se witmielieproduksie aansienlik hoër was.

2 Percentage plantings of white and yellow maize
Persentasie aanplantings van wit- en geelmielies



3 Production of white and yellow maize
Produksie van wit- en geelmielies



SORGHUM

Graph 4 shows the sorghum area planted, the production and average yield since the 1990/1991 season. It is clear that sorghum production showed a downward trend over this period, while the yield showed an upward trend. The sorghum area of 28 800 ha planted during the 2017/2018 season was the smallest area yet planted since the 1990/1991 season. However, the production for the season was not unsatisfactory. The final production estimate for the 2017/2018 season by the National Crop Estimates Committee (CEC) stood at 109 900 tons. Although it is roughly 28% less than that for the previous season, the average yield for the season was about 6% higher than for the previous season. The average yield of 3,81 t/ha is a new South African record yield for sorghum. It is higher than the previous season's record yield of 3,58 t/ha and also considerably higher than the long-term average yield of 2,68 t/ha.

SUNFLOWER SEED

The sunflower seed area of 601 500 hectares that was planted during the 2017/2018 production season was approximately 5,4% smaller than that for the previous season. The sunflower seed plantings in the western parts of the country occurred particularly late because of the late rain in those areas. This left the market very sceptical initially in terms of yield expectations. The sunflower seed production for this season eventually recovered quite well, and according to the CEC's final production estimate for the 2017/2018 season the sunflower seed production stood at 858 605 tons. This was approximately 2% lower than the previous season's production. The average yield of 1,43 t/ha for the season was approximately 3,8% higher than that for the previous season, while the long-term average yield was approximately 1,25 t/ha. **Graph 5** (on page 82) shows the area planted with sunflower seed, production and the average yield from the 1990/1991 season up to the 2017/2018 season.

GROUNDNUTS

Graph 6 (on page 83) shows the area planted, production and the average yield of groundnuts in South Africa since the 2000/2001 season. It is clear that the plantings as well as the production

SORGHUM

Grafiek 4 toon die sorghumoppervlakte aangeplant, die produksie en gemiddelde opbrengs sedert die 1990/1991-seisoen. Dit is duidelik dat die sorghumproduksie oor hierdie tydperk 'n afwaartse tendens getoon het, terwyl die opbrengste 'n stygende tendens getoon het. Die sorghumoppervlakte van 28 800 ha, wat gedurende die 2017/2018-seisoen aangeplant is, is die kleinste oppervlakte nóg wat sedert die 1990/1991-seisoen aangeplant is. Die produksie vir die seisoen was egter nie onbevredigend nie. Die Nasionale Oesskattingskomitee (NOK) se finale produksieskatting vir die 2017/2018-seisoen word op 109 900 ton geskat. Alhoewel dit ongeveer 28% minder is as die vorige seisoen se skatting, is die gemiddelde opbrengs vir die seisoen ongeveer 6% hoër as die vorige seisoen se opbrengs. Die gemiddelde opbrengs van 3,81 t/ha is 'n nuwe Suid-Afrikaanse rekordopbrengs vir sorghum. Dit is hoër as die vorige seisoen se rekord gemiddelde opbrengs van 3,58 t/ha en ook aansienlik hoër as die langtermyngemiddelde opbrengs van 2,68 t/ha.

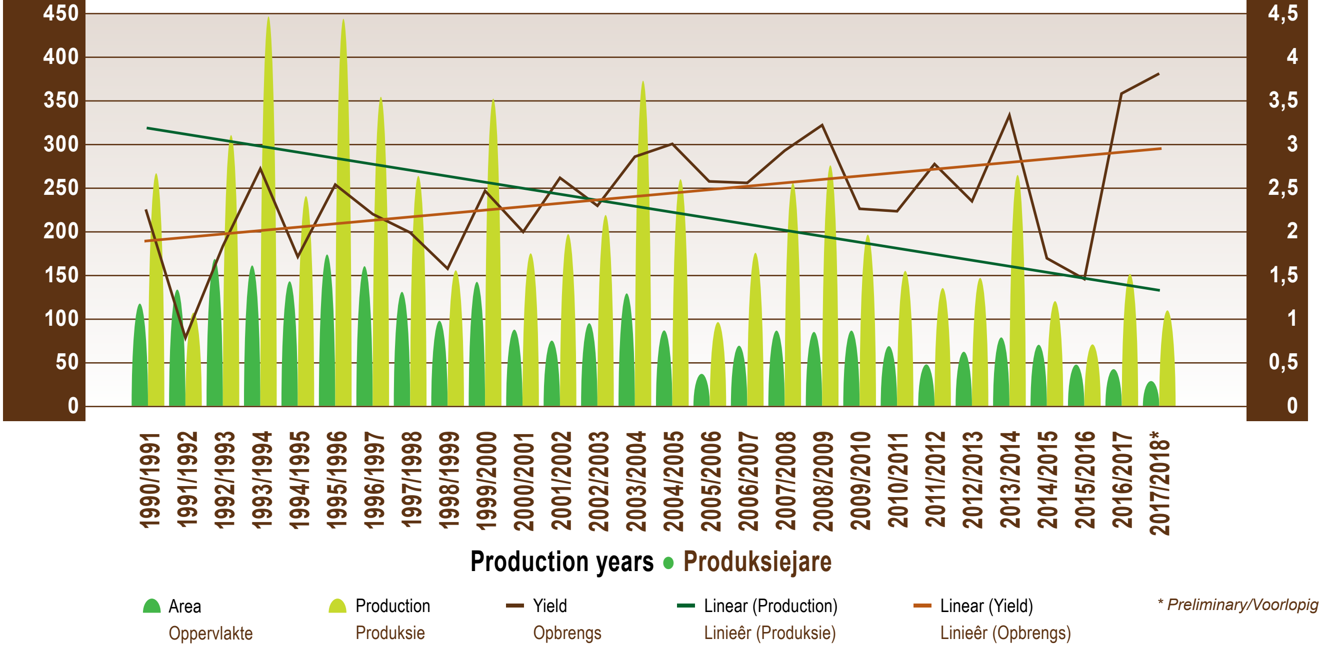
SONNEBLOMSAAD

Die sonneblomsaad-oppervlakte van 601 500 hektaar wat gedurende die 2017/2018-produksieseisoen aangeplant is, is ongeveer 5,4% kleiner as wat die vorige seisoen se aanplantings was. Die sonneblomsaad-aanplantings het in die westelike gedeeltes van die land, as gevolg van die reën wat laat was, in hierdie gedeeltes besonder laat plaasgevind. Dit het die mark aanvanklik bitter skepties gelaat in terme van opbrengsverwagtinge. Die sonneblomsaadproduksie vir die seisoen het op die ou einde redelik goed herstel en volgens die NOK se finale produksieskatting vir die 2017/2018-seisoen staan die sonneblomsaadproduksie op 858 605 ton. Dit is ongeveer 2% laer as die vorige seisoen se produksie. Die gemiddelde opbrengs van 1,43 t/ha vir die seisoen is ongeveer 3,8% hoër as die vorige seisoen se opbrengs, terwyl die langtermyngemiddelde opbrengs ongeveer 1,25 t/ha is. **Grafiek 5** (op bladsy 82) toon sonneblomsaad se oppervlakte aangeplant, produksie asook die gemiddelde opbrengste vanaf die 1990/1991-seisoen tot en met die 2017/2018-seisoen.

GRONDBONE

Grafiek 6 (op bladsy 83) toon die oppervlakte aangeplant, produksie en gemiddelde opbrengs van grondbone in Suid-Afrika sedert die

4 Sorghum area planted and production
Sorghumoppervlakte geplant en produksie



of groundnuts has come under pressure over the past few years and that it is demonstrating a significant downward trend. Factors contributing to this decline are increasing labour costs, the price ratio between groundnuts and maize, and the high capital costs of mechanising groundnut cultivation. The total area of 56 300 hectares planted during the 2017/2018 season was only 300 hectares more than the previous season's area of 56 000 hectares planted. The total production for the season was considerably lower than the previous seasons' production, and in general it was an extremely challenging year for groundnut production. This season also faced considerable challenges in terms of the quality of the local crop. The total production of 53 750 tons for the season was 42% lower than the previous season's production. The average yield of 0,95 t/ha for the season was also considerably lower than the previous season's average yield of 1,64 t/ha.

SOYBEANS

South Africa's soybean production achieved a new record level again during the 2017/2018 production season – both in terms of the area planted and production for the season. The total area of 787 200 hectares planted during the 2017/2018 season was approximately 37% more than the previous season's area planted. The total production of 1,551 million tons was a new record. It topped the previous season's record by 18%. According to the CEC's final crop estimate, the average yield for the season was 1,97 t/ha. Although this was lower than the previous season's yield, it was still, after the previous season's record yield of 2,29 t/ha and the 2,17 t/ha of the 2008/2009 season, the third highest average yield ever obtained in South Africa. **Graph 7** shows the total area planted, production and the average yield of soybeans in South Africa since the 1990/1991 season.

DRY BEANS

The dry-bean plantings for the 2017/2018 season were 53 360 hectares, which represents an increase of 18% in the area planted compared to that of the 2016/2017 season. According to the CEC's final estimate of summer grains the production for the season was 69 360 tons. It increased by approximately 1,2% from the previous season's 68 525 tons. The average yield of 1,3 t/ha for the season

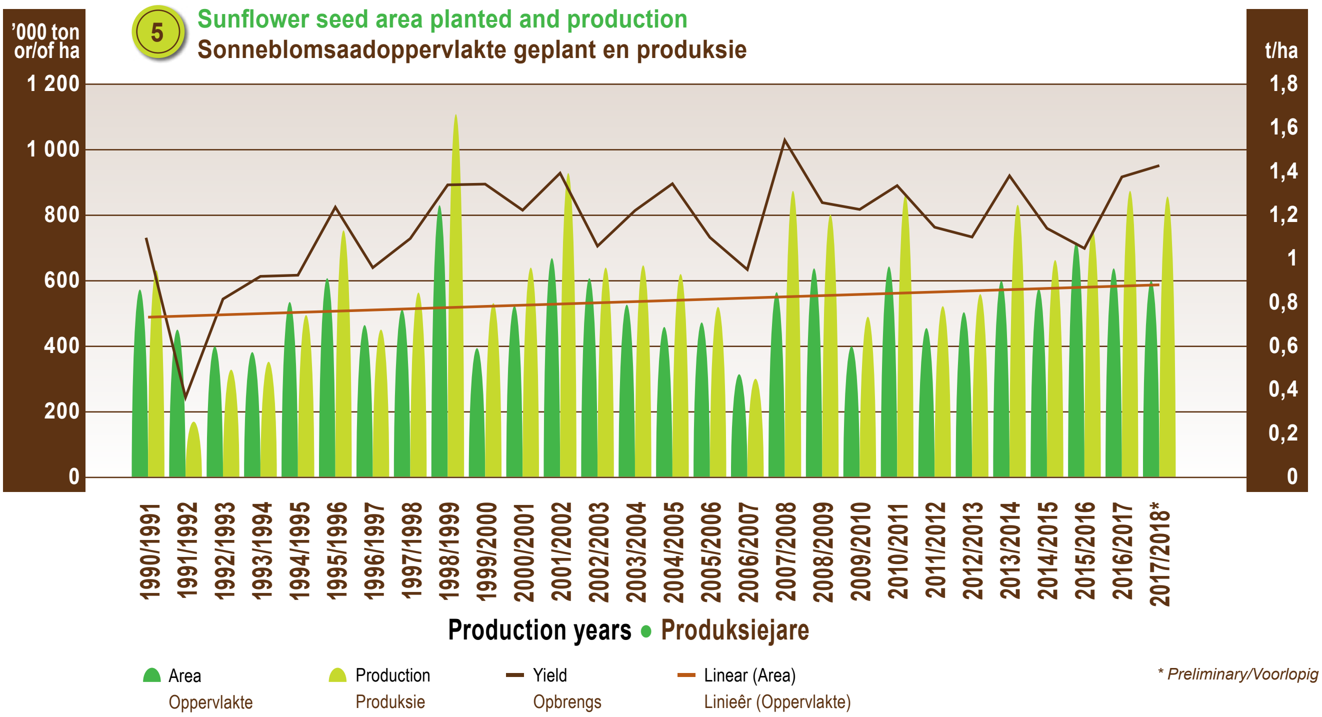
2000/2001-seisoen. Dit is duidelik dat die aanplantings, sowel as die produksie van grondbone, die afgelope paar jaar onder druk gekom het en dat dit 'n duidelike afwaartse tendens toon. Bydraende faktore tot hierdie afname is stygende arbeidskoste, die prysverhouding tussen grondbone en mielies asook die hoë kapitaalkoste verbonde aan die meganisering van grondboonverbouing. Die totale oppervlakte van 56 300 hektaar, wat gedurende die 2017/2018-seisoen aangeplant is, is slegs 300 hektaar meer as die vorige seisoen se oppervlakte van 56 000 ha aangeplant. Die totale produksie vir die seisoen was aansienlik laer as die vorige seisoen se produksie en oor die algemeen was dit 'n uiters uitdagende jaar vir grondboonproduksie. Daar was hierdie seisoen ook heelwat uitdagings in terme van kwaliteit met die plaaslike oes. Die totale produksie van 53 750 ton vir die seisoen is 42% laer as die vorige seisoen se produksie. Die gemiddelde opbrengs van 0,95 t/ha vir die seisoen is ook aansienlik laer as die vorige seisoen se gemiddelde opbrengs van 1,64 t/ha.

SOJABONE

Suid-Afrika se sojaboonproduksie het gedurende die 2017/2018-produksieseisoen weer 'n nuwe rekordvlak bereik – beide in terme van die oppervlakte aangeplant en produksie vir die seisoen. Die totale oppervlakte van 787 200 hektaar, wat gedurende die 2017/2018-seisoen aangeplant is, is ongeveer 37% meer as die vorige seisoen se oppervlakte aangeplant. Die totale produksie van 1,551 miljoen ton is 'n nuwe rekord. Dit het die vorige seisoen se rekord met 18% getroef. Die gemiddelde opbrengs vir die seisoen is volgens die NOK se finale produksieskatting 1,97 t/ha. Alhoewel dit laer as verlede seisoen se opbrengs is, is dit steeds, naas verlede seisoen se rekordopbrengs van 2,29 t/ha en die 2008/2009-seisoen se 2,17 t/ha, die derde hoogste gemiddelde opbrengs wat nóg in Suid-Afrika verkry is. **Grafiek 7** toon die totale oppervlakte aangeplant, produksie en gemiddelde opbrengs van sojabone sedert die 1990/1991-seisoen.

DROËBONE

Die droëboonaanplantings vir die 2017/2018-seisoen was 53 360 hektaar, wat 'n toename van 18% in die oppervlakte aangeplant, gemeet teen dié van die 2016/2017-seisoen, verteenwoordig. Die produksie vir die seisoen was volgens die NOK se finale skatting van somergrane 69 360 ton. Dit het met ongeveer 1,2% vanaf die vorige seisoen se



was also considerably lower than the previous season's average yield of 1,52 t/ha. The yield for the season was higher than the long-term average of 1,2 tons/ha, however. **Graph 8** (on page 84) shows the area planted, production and the average yield for dry beans in South Africa from the 1990/1991 up to the 2017/2018 season.

WHEAT

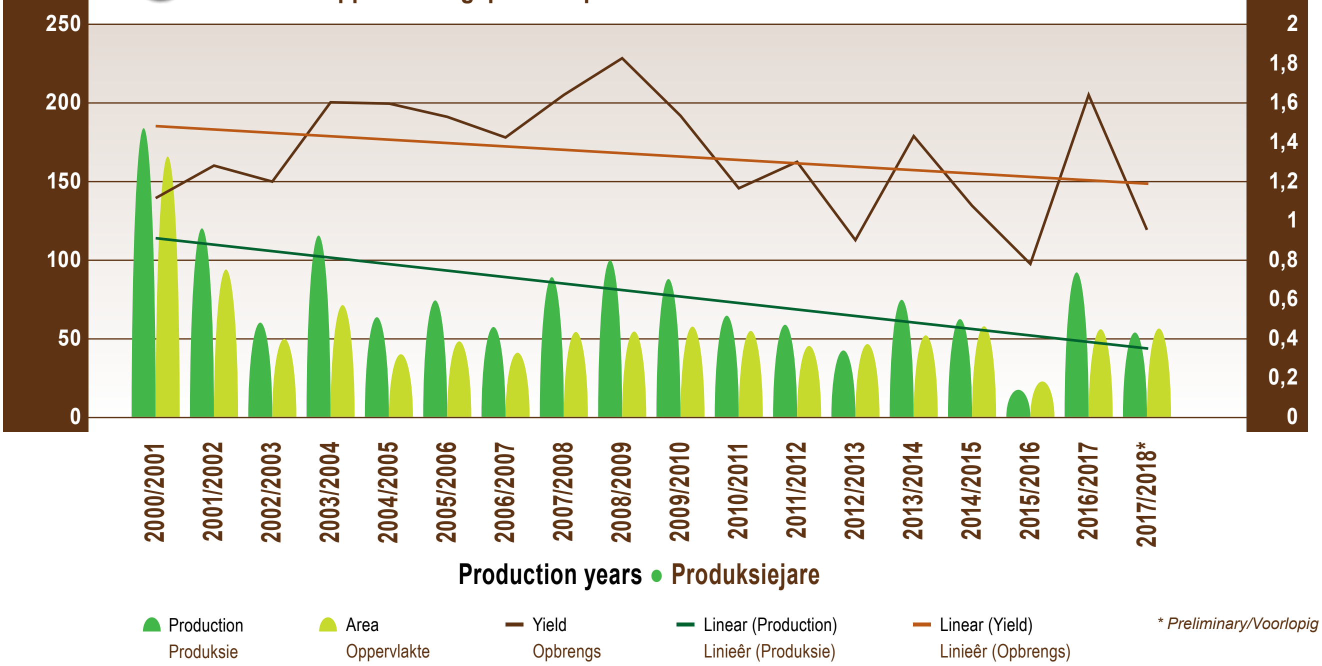
The 2017/2018 season was an extremely challenging one for wheat production, with the environmental conditions in the Western Cape in particular being extremely unfavourable. The biggest part of the production season was dominated by drought conditions. This led to a considerable decrease in the local wheat production.

68 525 ton toegeneem. Die gemiddelde opbrengs vir die seisoen was ongeveer 1,3 t/ha, wat heelwat laer as die vorige seisoen se gemiddelde opbrengs van 1,52 t/ha is. Die opbrengs vir die seisoen was wel hoër as die langtermyngemiddeld van 1,2 t/ha. **Grafiek 8** (op bladsy 84) toon die oppervlakte aangeplant, die produksie asook die gemiddelde opbrengste vanaf 1990/1991 tot en met die 2017/2018-seisoen vir droëbone in Suid-Afrika.

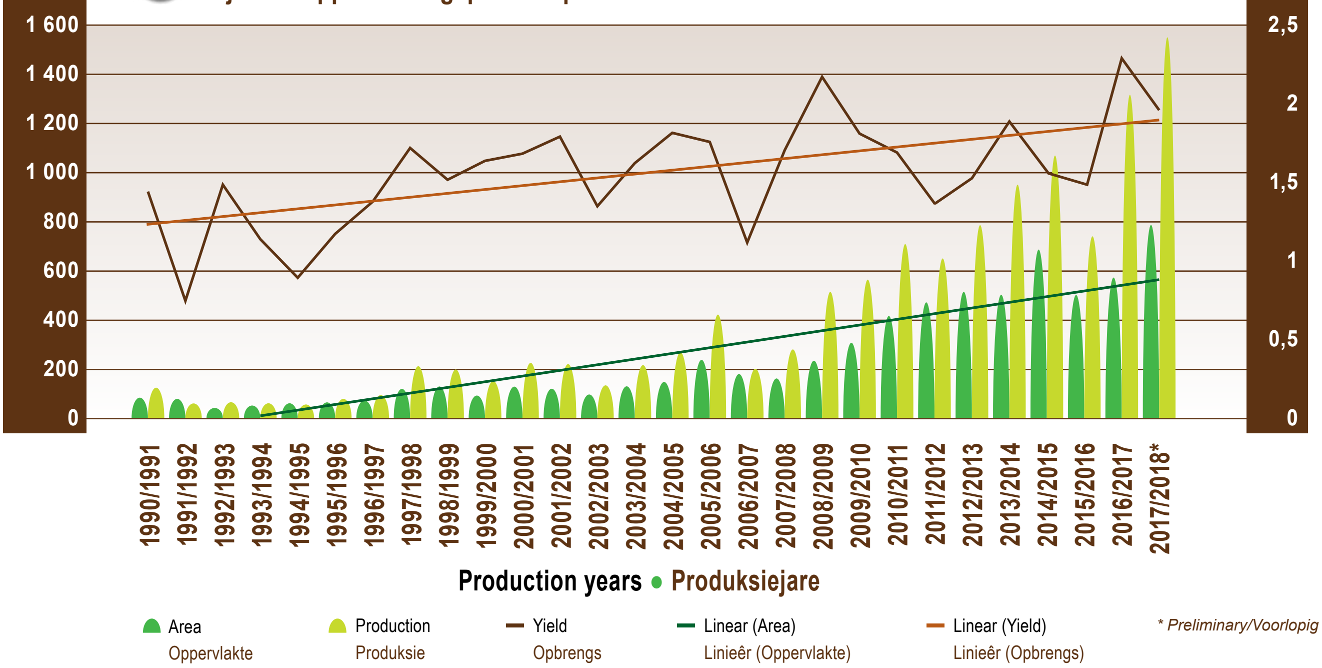
KORING

Die 2017/2018-seisoen was 'n uiters uitdagende seisoen vir koring-produksie – met die omgewingstoestande wat veral in die Wes-Kaap uiters ongunstig was. Die grootste gedeelte van die produksieseisoen

6 Groundnuts area planted and production
Grondboonoppervlakte geplant en produksie



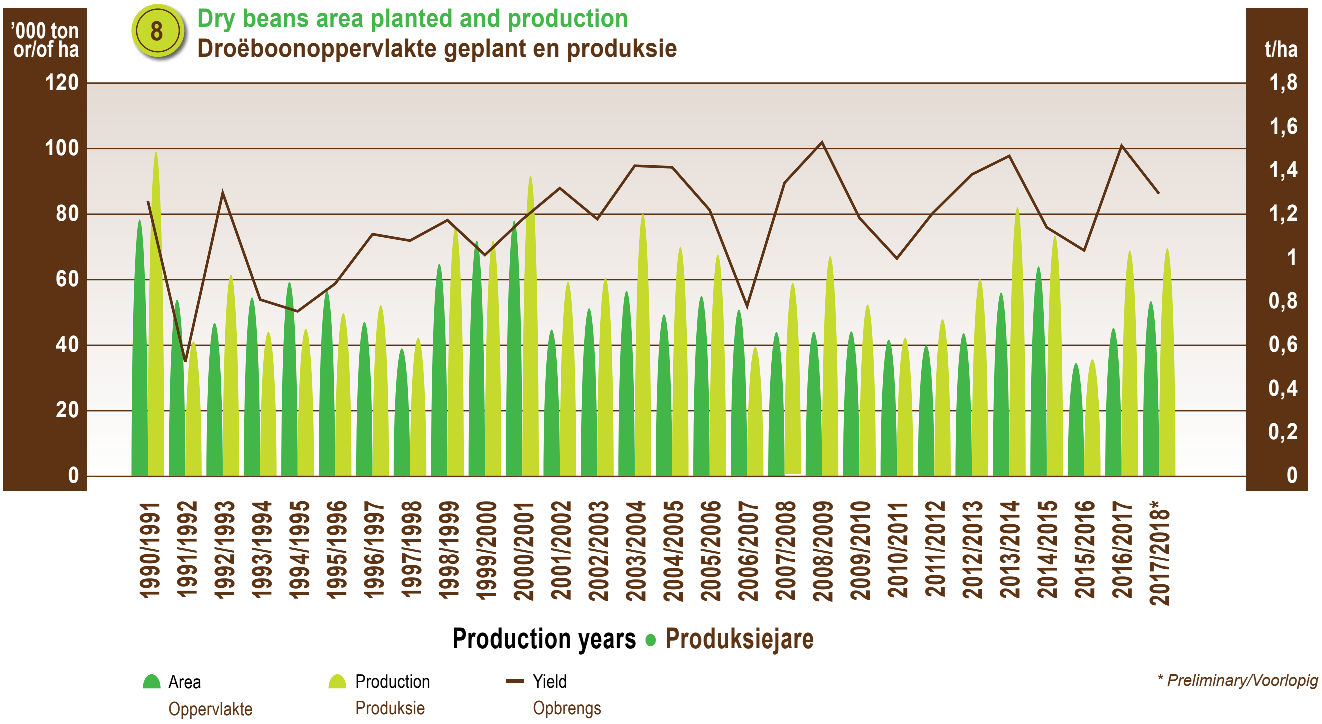
7 Soybeans area planted and production
Sojaboonoppervlakte geplant en produksie



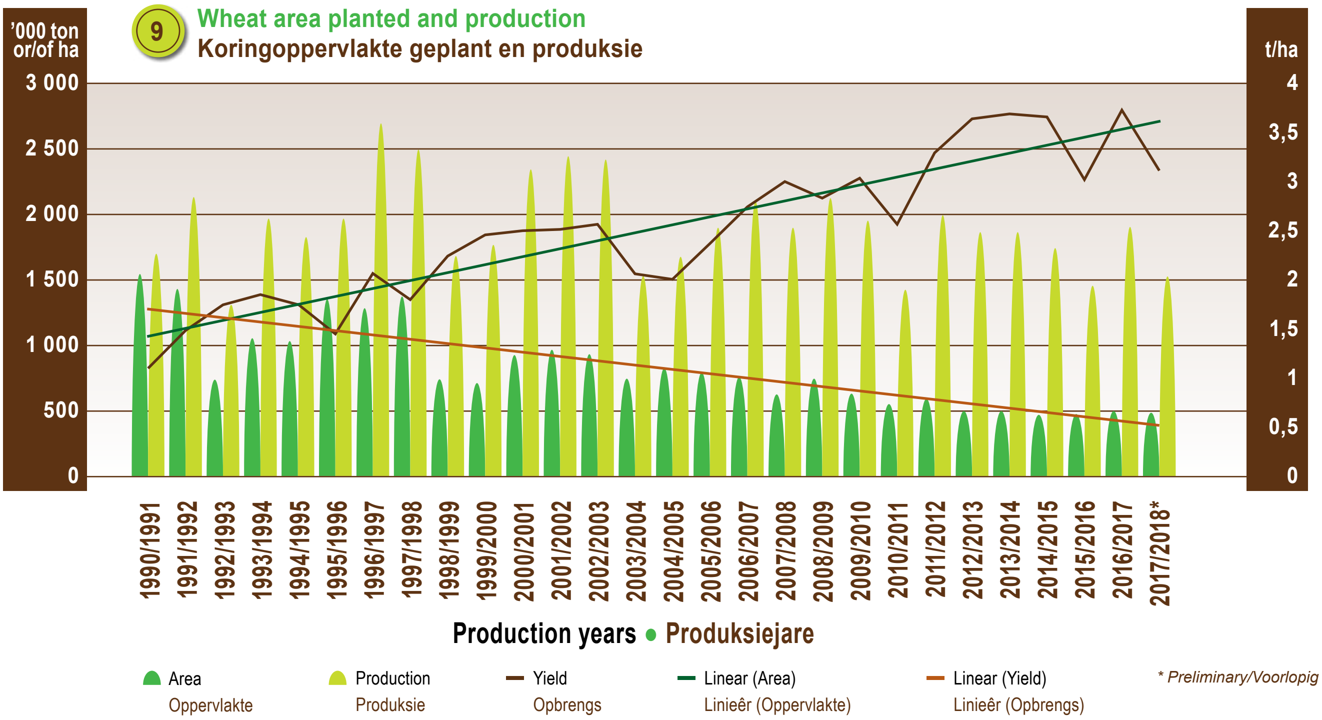
The total area of 491 600 ha planted during the 2017/2018 season was approximately 3% lower than the previous season's plantings of 508 365 ha. According to the CEC's final estimate for winter grains, the total production for the 2017/2018 season amounted to 1 535 000 tons. This was approximately 20% lower than the previous season's production. The lower production can be largely attributed to the dry conditions prevailing in the Western Cape. This province's total production for the season was reported to be 586 800 tons. This represents a drop of 47% from the previous season's wheat production in the Western Cape. The average yield of 2017/2018 season was reported as 3,12 t/ha, which was lower than the previous season's average yield of 3,76 t/ha. The Western Cape's average yield for the season was 1,8 t/ha, compared to the

is oorheers deur droogtetoestande. Dit het gelei tot 'n aansienlike daling in die plaaslike koringproduksie. Die totale oppervlakte van 491 600 ha, wat gedurende die 2017/2018-seisoen aangeplant is, is ongeveer 3% laer as die vorige seisoen se aanplantings van 508 365 ha. Die totale produksie vir die 2017/2018-seisoen kom volgens die NOK se finale skatting vir wintergrane op 1 535 000 ton te staan. Dit is ongeveer 20% laer as die vorige seisoen se produksie. Die laer produksie kon grootliks toegeskryf word aan die droë toestande wat in die Wes-Kaap geheers het. Hierdie provinsie se totale produksie vir die seisoen is op 586 800 ton gerapporteer. Dit verteenwoordig 'n daling van 47% vanaf die vorige seisoen se koringproduksie in die Wes-Kaap. Die gemiddelde opbrengs vir die 2017/2018-seisoen is as 3,12 t/ha gerapporteer, wat laer is as die vorige seisoen se gemiddelde opbrengs van 3,76 t/ha. Die Wes-Kaap

8 **Dry beans area planted and production**
Droëboonoppervlakte geplant en produksie



9 **Wheat area planted and production**
Koringoppervlakte geplant en produksie



previous season's 3,4 t/ha. **Graph 9** shows the total area planted, production and the average yield of wheat since the 1990/1991 season.

MALT BARLEY

In the 2017/2018 season the area planted with malt barley was reported as 91 380 ha – which represented an increase of approximately 3% from the area that was planted in the 2016/2017 season. According to the CEC's final estimate for winter grains, the production for the 2017/2018 season was 307 000 tons, which was 13% lower than the previous season's production. In spite of the increase in the area planted, the lower production was once again a result of the unfavourable production conditions in the Western Cape during the production season. The average yield for the 2017/2018 season was reported as 3,36 t/ha, which was lower than the previous season's average yield of 3,99 t/ha. The long-term average yield of barley was approximately 3,3 t/ha. **Graph 10** shows the total area planted, production and the average yield of malt barley in South Africa since the 2000/2001 season.

CANOLA

Graph 11 (on page 86) shows the area planted, production and average yield of canola from the 1998/1999 production season up to the 2017/2018 production season. The total area planted from the 2016/2017 season up to the 2017/2018 season increased by about 23% and was reported to be 84 000 hectares. During this period the total production dropped by about 11%, and according to the CEC's second production estimate for the 2017/2018 season was estimated at 93 500 tons, measured against the 105 000 tons for the previous

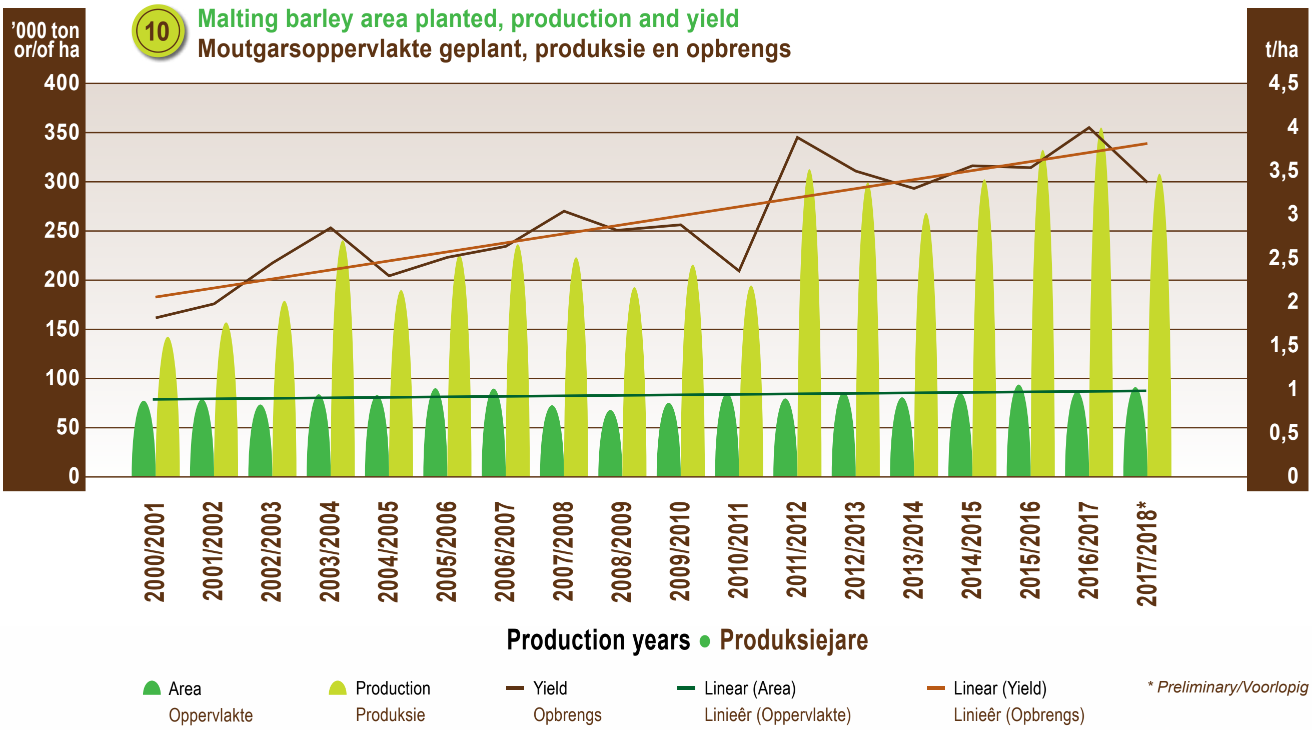
se gemiddelde opbrengs vir die seisoen was 1,8 t/ha teenoor die vorige seisoen se 3,4 t/ha. **Grafiek 9** toon die koringoppervlakte aangeplant, produksie en gemiddelde opbrengs sedert die 1990/1991-seisoen.

MOUTGARS

In die 2017/2018-seisoen is die oppervlakte wat met moutgars beplant is as 91 380 ha gerapporteer – wat 'n toename van ongeveer 3% vanaf die oppervlakte wat gedurende die 2016/2017-seisoen aangeplant is, verteenwoordig. Die produksie vir die 2017/2018-seisoen was, volgens die NOK se finale skatting vir wintergrane, 307 000 ton – wat 13% laer is as die vorige seisoen se produksie. Die laer produksie was, ten spyte van die toename in die oppervlakte wat aangeplant is, ook weer eens 'n resultaat van die ongunstige produksietoestande wat gedurende die produksieseisoen in die Wes-Kaap geheers het. Die gemiddelde opbrengs vir die 2017/2018-seisoen is op 3,36 t/ha gerapporteer – wat laer is as die vorige seisoen se 3,99 t/ha. Die langtermyngemiddelde opbrengs van gars is ongeveer 3,3 t/ha. **Grafiek 10** toon die oppervlakte aangeplant, produksie en gemiddelde opbrengs van moutgars sedert die 2000/2001-seisoen.

KANOLA

Grafiek 11 (op bladsy 86) toon die oppervlakte aangeplant, produksie en gemiddelde opbrengs van kanola vanaf 1998/1999-produksieseisoen tot en met die 2017/2018-produksieseisoen. Die totale oppervlakte aangeplant het met ongeveer 23% vanaf die 2016/2017-seisoen tot en met die 2017/2018-seisoen toegeneem en is as 84 000 ha gerapporteer. Die totale produksie het gedurende hierdie tydperk met ongeveer 11% gedaal en is volgens die NOK se finale produksieskatting vir die 2017/2018-seisoen op 93 500 ton geskat, gemeet teen die vorige



season. The average yield for the 2017/2018 season was estimated at 1,11 t/ha, compared to 1,54 t/ha for the previous season, and the ten-year average yield of 1,34 t/ha. The weather conditions in the Western Cape, where all the canola is produced, were unfavourable during the biggest part of the production season due to the drought conditions. This placed the production for the season under pressure, which can be seen clearly from the average yield obtained in the season.

National Crop Estimates Committee

The CEC has constantly proven itself to be credible over the years by making credible and accurate estimates. The CEC estimates the production per province for the different crops, but also announces the yield of maize per magisterial district for the three main maize-producing provinces of South Africa, namely the Free State, Mpumalanga and North West. The committee estimates the average yields only on a provincial basis and those that are released on the basis of magisterial district are obtained from a sample done by the Department of Agriculture, Forestry and Fisheries. **Table 1**, **Table 2** and **Table 3** show the average yield per magisterial district for the Free State, Mpumalanga and North West respectively. The yields are compared to those for the previous season.

From Table 1 it is clear that the yields obtained in the Free State during the 2017/2018 season were lower than those for the previous season in most parts of the province. The previous season was an absolute record production season, with exceptional average yields reported for the season. However, there are some parts of the Free State, like Wesselsbron, Hoopstad, Frankfort and Odendaalsrus, where the average yield during the 2017/2018 season was in fact higher than for the 2016/2017 season. The average maize yield for the Free State was estimated at 5,21 t/ha.

In Mpumalanga (Table 2) the average yield for most of the areas was also lower in the 2017/2018 season than in the 2016/2017 season. The regions in Mpumalanga where the average yield for the season was higher than that for the previous season were Lydenburg, Belfast, Middelburg and Hoëveldrif. The average yield for Mpumalanga during the 2017/2018 season was 6 t/ha.

seisoen se 105 000 ton. Die gemiddelde opbrengs vir die 2017/2018-seisoen was 1,11 t/ha gemeet teen die vorige seisoen se 1,54 t/ha en die tien jaar gemiddelde opbrengs van 1,34 t/ha. Die weersomstandighede in die Wes-Kaap, waar al die kanola geproduseer word, was vir die grootste gedeelte van die produksieseisoen ongunstig as gevolg van droë toestande wat daar voorgekom het. Dit het die produksie vir die seisoen onder druk geplaas, wat duidelik in die laer gemiddelde opbrengs wat in die seisoen verkry is, gesien kan word.

Nasionale Oesskattingskomitee

Die NOK het hulself deur die jare as geloofwaardig bewys deur deurlopend geloofwaardige en akkurate skattings te maak. Die NOK skat die produksie per provinsie vir die verskillende gewasse, maar maak ook die opbrengste van mielies per landdrosdistrik bekend vir drie hoofmielieproduserende provinsies in die land, naamlik die Vrystaat, Mpumalanga en die Noordwes Provinsie. Die komitee skat die gemiddelde opbrengste net op 'n provinsiale basis en dié wat bekend gemaak word op 'n landdrosdistrikbasis word vanaf 'n steekproef, wat deur die Departement Landbou, Bosbou en Visserye gedoen word, verkry. **Tabel 1**, **Tabel 2** en **Tabel 3** toon die gemiddelde opbrengs per landdrosdistrik vir die Vrystaat, Mpumalanga en Noordwes onderskeidelik. Die opbrengste word vergelyk met die vorige seisoen se opbrengste.

Uit Tabel 1 is dit duidelik dat die opbrengste wat gedurende die 2017/2018-seisoen in die Vrystaat verkry is, in meeste gedeeltes van die provinsie laer as die vorige seisoen se opbrengste was. Die vorige seisoen was 'n absolute rekordproduksiejaar, met uitsonderlike gemiddelde opbrengste wat vir die seisoen gerapporteer is. Daar is egter sommige gedeeltes in die Vrystaat, soos Wesselsbron, Hoopstad, Frankfort en Odendaalsrus, waar die gemiddelde opbrengs gedurende die 2017/2018-seisoen wel hoër as dié vir die 2016/2017-seisoen was. Die gemiddelde mielie-opbrengs vir die Vrystaat is op 5,21 t/ha geskat.

In Mpumalanga (Tabel 2) was die gemiddelde opbrengs ook vir meeste van die areas gedurende die 2017/2018-seisoen laer as gedurende die 2016/2017-seisoen. Die streke in Mpumalanga waar die gemiddelde opbrengs vir die seisoen wel hoër was as dié van die vorige seisoen is Lydenburg, Belfast, Middelburg en Hoëveldrif. Die gemiddelde opbrengs vir Mpumalanga gedurende die 2017/2018-seisoen is 6 t/ha.

11 Canola area planted, production and yield
Kanola-oppervlakte geplant, produksie en opbrengs

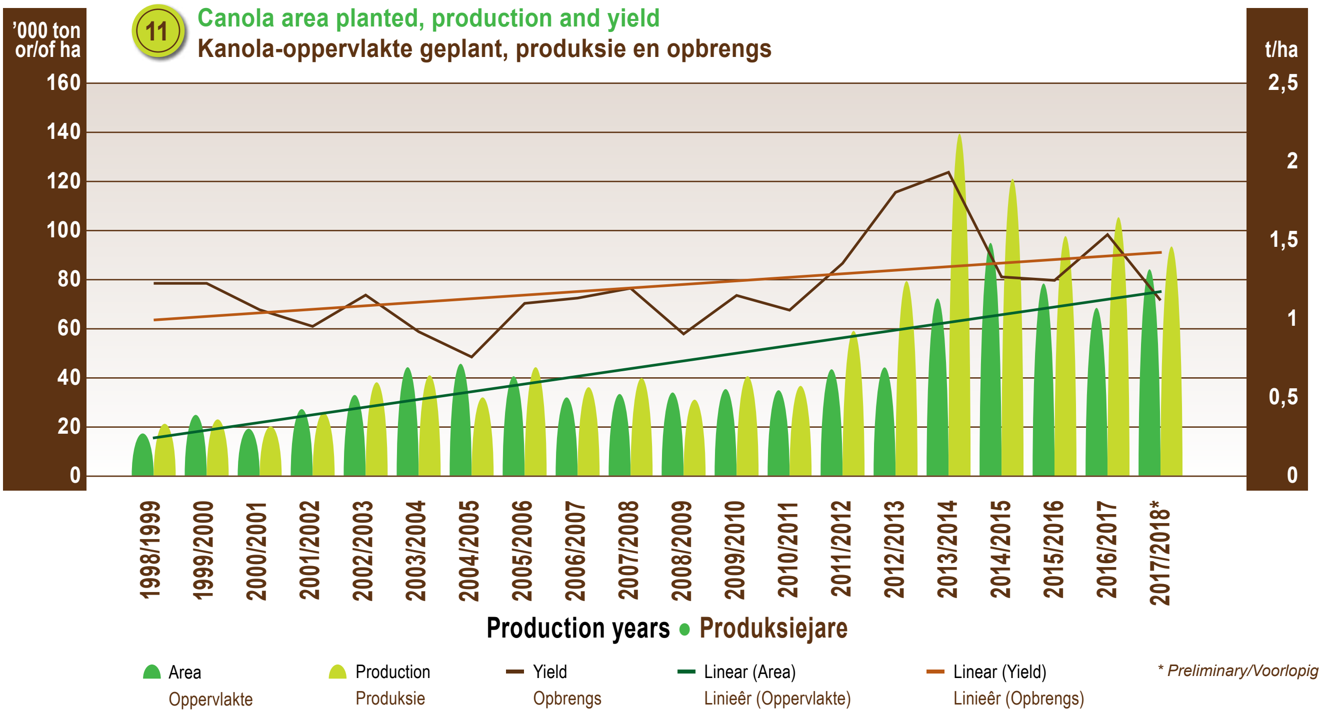


Table 3 shows the average yield per region for North West. Here the same trend as in most of the other provinces could be observed – with the average yield during the 2017/2018 season being largely lower than during the 2016/2017 season. The two districts in North West where the average yield for the 2017/2018 season was higher than during the 2016/2017 season were Potchefstroom and Vryburg. The average yield for the 2017/2018 season for North West was 5,54 t/ha.

If you do not already participate in the crop estimate, Grain SA encourages you to complete the questionnaires that are sent to you. If you do not receive the questionnaire, contact Rona Beukes, member of the CEC, at 012 319 8032 or send her an email at *RonaB@daff.gov.za*.

Tabel 3 toon die gemiddelde opbrengs per streek vir die Noordwes Provinsie. Hier het dieselfde tendens, wat in meeste van die ander provinsies waargeneem is, voorgekom – met die gemiddelde opbrengs wat gedurende die 2017/2018-seisoen meestal laer was as gedurende die 2016/2017-seisoen. Die twee distrikte in die Noordwes Provinsie waar die gemiddelde opbrengs vir die 2017/2018-seisoen hoër was as gedurende die 2016/2017-seisoen is die Potchefstroom- en Vryburg-distrikte. Die gemiddelde opbrengs vir die 2017/2018-seisoen vir die Noordwes is 5,54 t/ha.

Graan SA wil u aanmoedig om, indien u nie alreeds aan die oesskatting deelneem nie, asseblief die vraelyste wat aan u gestuur word, te voltooi. Indien u nie die vraelys ontvang nie, kontak Rona Beukes, lid van die NOK, gerus by 012 319 8032 of stuur vir haar 'n e-pos na *RonaB@daff.gov.za*.

1 Free state – final maize yields per magisterial district as obtained from producers
Vrystaat – finale mielie-opbrengste per landdrosdistrik soos verkry vanaf produsente

Magisterial district Landdrosdistrik	2016/2017 (t/ha)	2017/2018 (t/ha)
Bethlehem	6,74	5,96
Boshof	6,24	5,75
Bothaville	5,64	5,28
Bultfontein	5,60	3,16
Clocolan	6,18	4,73
Excelsior	4,38	3,27
Fouriesburg	6,99	6,21
Fauresmith	-	14,39
Frankfort	5,38	6,18
Harrismith	7,39	6,26
Heilbron	4,01	3,33
Hennenman	6,08	5,76
Hoopstad	6,15	6,47
Jacobsdal	12,86	-
Koppies	5,05	5,04
Kroonstad	7,39	4,64
Ladybrand	5,17	3,48
Lindley	5,51	4,40
Marquard	5,00	3,45
Odendaalsrus	4,70	5,12
Parys	4,33	3,09
Reitz	6,05	5,27
Sasolburg	5,83	4,26
Senekal	3,33	3,00
Theunissen	7,33	5,75
Viljoenskroon	6,99	5,84
Vrede	5,10	3,69
Vredefort	5,51	4,48
Wesselsbron	6,48	6,52
Winburg	3,51	3,50
Average (CEC)/Gemiddeld (NOK)	6,32	5,21

2 Mpumalanga – final maize yields per magisterial district as obtained from producers
Mpumalanga – finale mielie-opbrengste per landdrosdistrik soos verkry vanaf produsente

Magisterial district Landdrosdistrik	2016/2017 (t/ha)	2017/2018 (t/ha)
Belfast	7,03	7,07
Bethal	8,85	7,30
Carolina	5,62	5,40
Delmas	7,92	7,11
Ermelo	6,19	5,62
Highveld Ridge/Hoëveldrif	7,31	7,44
Lydenburg	7,41	7,90
Middelburg	5,79	6,27
Piet Retief	7,96	7,91
Standerton	7,40	5,66
Witbank	6,93	6,85
Average (CEC)/Gemiddeld (NOK)	7,00	6,00

3 North West – final maize yields per magisterial district as obtained from producers
Noordwes – finale mielie-opbrengste per landdrosdistrik soos verkry vanaf produsente

Magisterial district Landdrosdistrik	2016/2017 (t/ha)	2017/2018 (t/ha)
Bloemhof	12,55	6,47
Coligny	5,24	4,38
Delareyville	4,72	4,26
Klerksdorp	4,28	3,31
Koster	5,25	4,95
Lichtenburg	5,15	4,49
Potchefstroom	4,34	5,33
Schweizer-Reneke	5,17	5,06
Ventersdorp	5,08	4,12
Vryburg	5,11	6,23
Wolmaransstad	5,63	5,48
Average (CEC)/Gemiddeld (NOK)	4,98	4,54

SUSTAINABLE CROP PRODUCTION UNDER PRESSURE

VOLHOUBARE GEWASPRODUKSIE ONDER DRUK

Insufficient soil moisture for planting summer grains in the optimum planting window hampered the production of summer grains. In the Western Cape the extreme drought conditions took their toll with respect to the production of winter grains. In addition, the volatility of the rand and the increases in the price of Brent crude oil forced producers to consider their options carefully.

In spite of all these realities, the average yields of most summer grains were reasonably good, but winter grains collapsed under the most severe drought yet and poorer production figures than for the previous season were recorded.

This report focuses in particular on input costs, actual production costs and the income of producers in order to establish the sustainable production of the crops.

Corné Louw
SENIOR ECONOMIST: INPUTS
SENIOR EKONOOM: INSETTE

Petru Fourie
RESEARCH CO-ORDINATOR AND PRODUCTION COST ANALYST
NAVORSINGSKOÖRDINEERDER EN PRODUKSIEKOSTE-ANALIS

INPUT OVERVIEW

Input environment

INTRODUCTION

Most of South Africa's inputs are imported, therefore, international input prices, crude oil prices and the value of the rand has a direct impact on the price discovery of local input prices. Throughout the reporting period, the value of the rand was extremely volatile, varying between a monthly average strongest level of R11,81/$ in February and the weakest level of R14,76/$ in September 2018. From September 2017 to September 2018 the value of the rand has depreciated by 12,2%. Together with price changes in international markets, this volatility made decision-making with respect to effective purchases a challenge. The Brent crude oil price increased significantly over the reporting period, from an average of $57,68 per barrel in October 2017 to $79,13 per barrel in September 2018 (37%). The volatility in the exchange rate and the Brent crude oil price can be seen in **Graph 1**.

DISPUTE RESOLUTION

Grain SA assisted various members during the reporting period – particularly with respect to dispute resolution. Disputes with regards to 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 annually by Grain SA. Ongoing discussions with seed companies and the South African National Seed Organisation (SANSOR) are also held to communicate the needs and concerns of Grain SA members. The

Onvoldoende grondvog vir die aanplant van somergrane in die optimale plantvenster daarvoor, het die produksie van somergrane gekortwiek. In die Wes-Kaap het die uiterste droogtetoestande, wat die produksie van wintergrane betref, sy tol geëis. Daarby het die volatiliteit van die rand en die Brent-ruolieprysstygings produsente hul opsies versigtig laat oorweeg.

Ten spyte van al hierdie realiteite was die gemiddelde opbrengste van die meeste somergrane redelik goed; wintergrane het egter onder die ergste droogte nóg meegegee en swakker produksiesyfers as die vorige seisoen is opgeteken.

In hierdie verslag word veral gefokus op insetkoste, werklike produksiekoste en inkomste van produsente ten einde die volhoubare produksie van die gewasse te bepaal.

INSETOORSIG

Insetomgewing

INLEIDING

Die meeste van Suid-Afrika se insette word ingevoer, dus het internasionale insetpryse, ruoliepryse en die waarde van die rand 'n direkte impak op die prysbepaling van plaaslike insetpryse. Regdeur die verslagtydperk was die waarde van die rand uiters onbestendig en het dit tussen 'n maandelikse gemiddelde sterkste vlak van R11,81/$ in Februarie en swakste vlak van R14,76/$ in September 2018 gewissel. Vanaf September 2017 tot September 2018 het die waarde van die rand met 12,2% verswak. Saam met die prysveranderinge op internasionale markte het hierdie onbestendigheid besluitneming ten opsigte van doeltreffende aankope 'n uitdaging gemaak. Oor die verslagtydperk het Brent-ruolie se prys beduidend gestyg vanaf 'n gemiddeld van $57,68 per vat in Oktober 2017 tot $79,13 per vat in September 2018 (37%). Die onbestendigheid van die wisselkoers en die prys van Brent-ruolie kan in **Grafiek 1** gesien word.

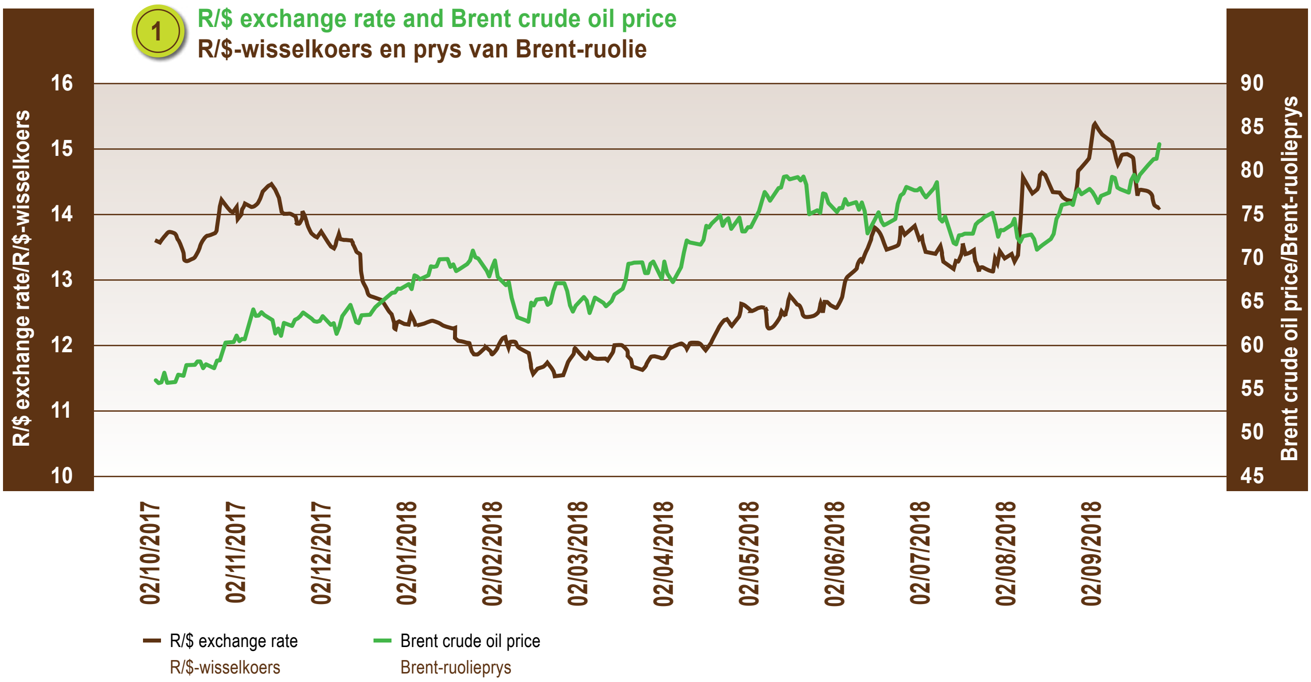
DISPUUTOPLOSSING

Graan SA het gedurende die verslagdoeningstydperk verskeie lede bygestaan – veral ten opsigte van geskilbeslegting. Geskille oor saadgehalte, landbouchemikalieë, BTW, die dieselkorting en kunsmis is in samewerking met Graan SA-lede hanteer.

Die saadbedryf

Saad is 'n belangrike produksie-inset, en afhangende van die plantdigtheid, beslaan dit tussen 10% en 17% van 'n mielieprodusent se veranderlike produksiekoste. 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

1 **R/$ exchange rate and Brent crude oil price**
R/$-wisselkoers en prys van Brent-ruolie



consistent increase in seed prices has always been a major concern to grain producers and some seed companies might start experiencing resistance to high prices.

Seed prices of companies such as Seed Co, Agri-Seed, Delta Seed and United Seed were included in the 2018/2019 production season for the first time.

SEED PRICES

Seven new wheat cultivars and two new barley cultivars were released in 2018. 33 wheat cultivars are commercially available in the northern production regions (including irrigation cultivars), whilst there are nine different cultivars in the Western Cape. Eleven barley cultivars are available for producers to plant in the Western Cape.

Wheat seed prices increased 3,7% on average on an annual basis. Some prices increased by 14%, while others decreased by as much as 6,7%. It is interesting to note that wheat seed prices in the northern production areas on average cost R344 per 25 kg bag, while seed prices in the Western Cape are R379 for a 50 kg bag. The prices of barley seed decreased by 0,5%. Canola seed prices were on average 5% higher than last year. There were canola cultivars that moved sideways, while others increased by up to 25%.

Maize seed prices for the 2018/2019 production season increased by 1,8% on average. Sunflower seed prices increased by 4,7% on average, grain sorghum seed prices by 7,5% and soybean seed prices by 0,5%. A good barometer for assessing price increases is the producer price index (PPI). Up until May 2018, when seed prices were published, the PPI was 4,4%. In other words, seen on an average basis – seed prices of especially sunflower and grain sorghum – increased more sharply than the production cost inflation of South Africa.

Maize seed prices can be analysed further by comparing them with maize prices. Since the 2001/2002 production season the maize price index (**Graph 2** on page 90) weakened significantly compared to the maize seed price index. With an estimated average producer price[1] of R1 984/ton for the coming season (2018/2019), the maize price index increased minimally more than maize seed prices.

se lede oor te dra. Die deurlopende verhoging in saadpryse was nog altyd 'n groot bekommernis vir graanprodusente, en sommige saadmaatskappye kan begin om weerstand teen hoë pryse te ervaar.

Die saadpryse van maatskappye soos Seed Co, Agri-Seed, Delta Seed en United Seed is in die 2018/2019-produksieseisoen vir die eerste keer ingesluit.

SAADPRYSE

Sewe nuwe koringkultivars en twee nuwe garskultivars is in 2018 vrygestel. 33 kultivars (insluitend besproeiingskultivars) is in die noordelike produksiestreke kommersieel beskikbaar, terwyl nege verskillende kultivars in die Wes-Kaap beskikbaar is. Elf garskultivars is beskikbaar vir produsente in die Wes-Kaap om te plant.

Koringsaadpryse het gemiddeld op 'n jaargrondslag met 3,7% gestyg. Sommige pryse het met 14% gestyg, terwyl ander met soveel soos 6,7% gedaal het. Dit is interessant om daarop te let dat koringsaad in die noordelike produksiegebiede gemiddeld R344 per 25 kg-sak kos, terwyl saad in die Wes-Kaap R379 per 50 kg-sak kos. Die prys van garssaad het met 0,5% gedaal. Kanolasaadpryse was gemiddeld 5% hoër as verlede jaar. Daar was pryse van kanolakultivars wat sywaarts beweeg het, terwyl ander met tot 25% gestyg het.

Mieliesaadpryse vir die 2018/2019-produksieseisoen het gemiddeld met 1,8% gestyg. Sonneblomsaadpryse het gemiddeld met 4,7% gestyg, graansorghumsaadpryse met 7,5%, en sojaboonsaadpryse met 0,5%.'n Goeie barometer vir die evaluering van prysverhogings is die produsenteprysindeks (PPI). Tot met Mei 2018, toe saadpryse gepubliseer is, was die PPI 4,4%. Met ander woorde, op 'n gemiddelde grondslag het die saadpryse van veral sonneblom en graansorghum skerper as die produksiekoste-inflasie van Suid-Afrika gestyg.

Mieliesaadpryse kan verder ontleed word deur dit met mieliepryse te vergelyk. Sedert die 2001/2002-produksieseisoen het die mielieprysindeks (**Grafiek 2** op bladsy 90) vergeleke met die mieliesaadprysindeks beduidend verswak. Met 'n geraamde gemiddelde produsenteprys[1] van R1 984/ton vir die komende seisoen (2018/2019), het die mielieprysindeks minimaal meer as mieliesaadpryse gestyg.

[1] *Average producer price = Safex, July 2018 price - average differential cost - handling costs*
[1] *Gemiddelde produsenteprys = Safex, Julie 2018-prys - gemiddelde differensiële koste - hanteringskoste*

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 soybean and wheat seed industry (in virtually all open-pollinated crops). According to seed companies it takes about twelve years and great expense to bring a new cultivar to the market. Without a proper funding model, this practice of holding back seed prevents new cultivars and the latest technology from coming to South Africa.

On 22 June 2018 the Minister of Agriculture, Forestry and Fisheries approved a statutory levy on soybeans in terms of which seed companies can be compensated for their performance in the soybean seed market. The levy collected will be paid to seed companies on the basis of their market share.

Grain SA regards the approval and implementation of this soybean breeding and technology levy as a major breakthrough. It will mean that producers have access to the newest cultivars and technology to enable them to compete with other countries.

The breeding and technology levy on soybeans has been approved for twice a year, effective from 1 March 2019. The levy is R65/ton for the first year and R80/ton for the second year.

These values were calculated as 1,2% of the average soybean price for the preceding marketing years and will be payable when producers sell their soybeans. For the first year's R65/ton the average price of soybeans for the 2015/2016 marketing year was used – 1,2% of R5 495/ton = R65/ton. For the second year's R80/ton the average price for the 2016/2017 marketing year was used (up to November 2016) – 1,2% of R6 647/ton = R80/ton. Therefore, as the levy continues (after this two-year term), the amount will vary depending on the trend of the soybean price and also the release of new technology.

In September 2018 the breeding an technology levy for wheat and barley was also renewed for a further two years and oats was included. The amounts for the next two marketing seasons will be R30/ton.

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 bose kringloop wat belegging in die sojaboon- en koringsaadbedryf (in feitlik alle oop-bestuifde gewasse) beperk en tot '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 verhinder hierdie praktyk om saad terug te hou dat nuwe kultivars en die jongste tegnologie na Suid-Afrika kom.

Die Minister van Landbou, Bosbou en Visserye het op 22 Junie 2018 'n statutêre heffing op sojabone goedgekeur, waarvolgens saadmaatskappye vergoed kan word vir hul prestasie in die sojaboonsaadmark. Die heffing wat ingevorder word, sal volgens saadmaatskappye se markaandeel aan hulle uitbetaal word.

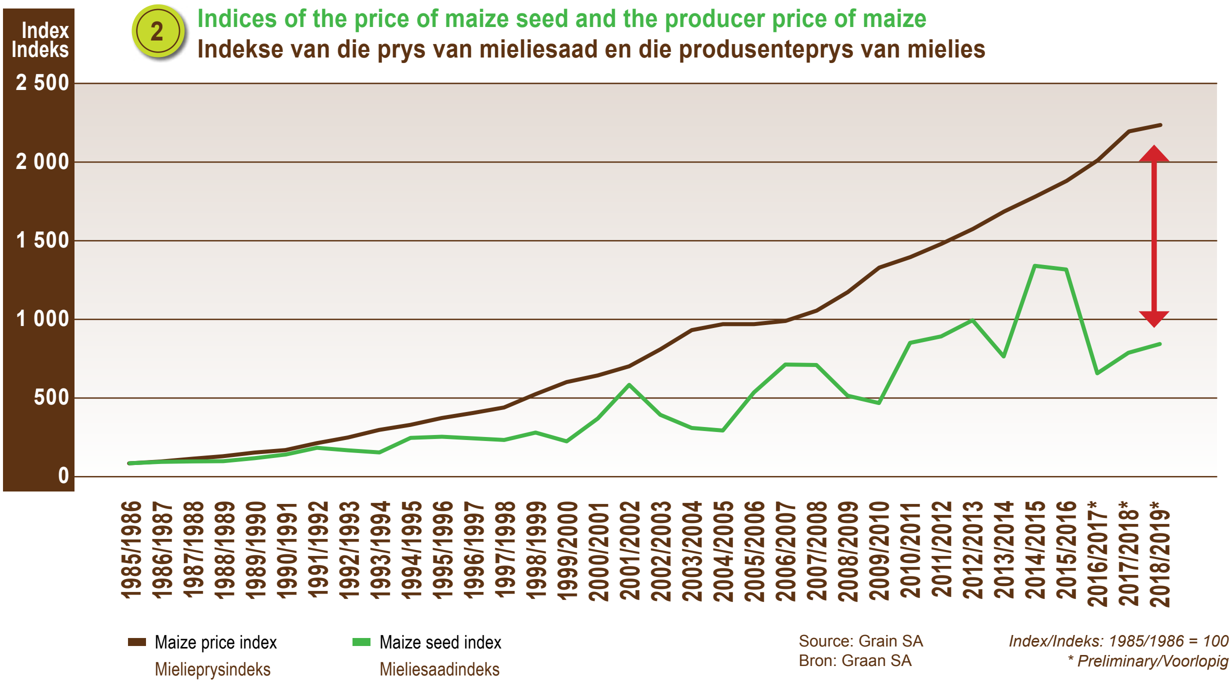
Graan SA sien die goedkeuring en implementering van hierdie sojaboon teling- en tegnologieheffing as 'n groot deurbraak. Dit sal meebring dat ons produsente toegang het tot die nuutste kultivars en tegnologie om sodoende met ander lande te kan meeding.

Die teling- en tegnologieheffing op sojabone is vir twee jaar goedgekeur, met ingang 1 Maart 2019. Die heffing is R65/ton vir die eerste jaar en R80/ton vir die tweede jaar.

Hierdie waardes is bereken as 1,2% van die voorafgaande bemarkingsjare se gemiddelde sojaboonprys en sal betaalbaar wees as produsente hulle sojabone verkoop. Vir die eerste jaar se R65/ton is die gemiddelde prys van die 2015/2016-bemarkingsjaar vir sojabone gebruik – 1,2% van R5 495/ton = R65/ton. Vir die tweede jaar se R80/ton is die gemiddelde prys van die 2016/2017-bemarkingsjaar gebruik (tot en met November 2016) – 1,2% van R6 647/ton = R80/ton. Soos die heffing vorder (na hierdie twee jaar-termyn), sal die bedrag dus varieer – afhangend van die tendens in die sojaboonprys en ook na aanleiding van die vrystelling van nuwe tegnologie.

In September 2018 is die teling- en tegnologieheffing vir koring en gars vir nog twee jaar hernu en is hawer ook hierby ingesluit. Die bedrae vir die volgende twee bemarkingseisoene gaan R30/ton beloop.

2 Indices of the price of maize seed and the producer price of maize
Indekse van die prys van mieliesaad en die produsenteprys van mielies



Source: Grain SA
Bron: Graan SA

Index/Indeks: 1985/1986 = 100
** Preliminary/Voorlopig*

SEED AVAILABILITY

SANSOR assured Grain SA during the annual meeting of the two organisations (2 August 2018) that a sufficient quantity of grain and oilseed seeds will be available for the 2018/2019 production season. They cautioned, however, that seed of certain popular sizes and varieties might be limited.

Liaison with SANSOR on a regular basis is important to ensure that challenges can be met 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 versus new active ingredients.
- Maize cultivar trials.
- SANSOR certification scheme.
- Possible alternative for thiram seed treatment.

The fertiliser industry

More and more fertiliser is imported into South Africa. This is not necessarily because of higher demand in South Africa, but because of a decrease in local fertiliser production. According to Fertasa, imports to South Africa are as follows:

Imports of fertiliser to South Africa:

- The import of fertiliser has grown considerably – from 1,9 million tons in 2016 to 2,2 million tons in 2017. Exports have increased from 0,75 million tons in 2016 to 0,83 million tons in 2017.
- The net imports therefore increased by a total of 26% for 2017, mainly as a result of net imports of 14% more urea and 39% more MAP.
- Total fertiliser consumption in South Africa for 2016/2017 was approximately 2,2 million physical tons of fertiliser, which represented 446 000 tons of nitrogen (N), 110 000 tons of phosphate (P), and 103 000 tons of potassium (K). (These figures came from Fertasa's calculations on the basis of crop plantings).

FERTILISER PRICES

From September 2017 to September 2018 international prices of ammonia, urea, DAP and potassium chloride increased significantly. **Table 1** shows the year-on-year price changes of international fertiliser prices in dollar terms.

BESKIKBAARHEID VAN SAAD

SANSOR het Graan SA tydens die jaarlikse vergadering van die twee organisasies (2 Augustus 2018) verseker dat 'n voldoende hoeveelheid graan- en oliesaad-saad vir die 2018/2019-produksieseisoen beskikbaar sal wees. Hulle het egter gewaarsku dat saad van sekere gewilde groottes en variëteite dalk beperk kan wees.

Dit is belangrik om op 'n gereelde grondslag met SANSOR te skakel om seker te maak dat uitdagings saam hanteer 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:

- Marktendense en produksiekoste vir die graan- en oliesadebedryf.
- Mieliesaaduitvoere na die VSA.
- Teling- en tegnologieheffing.
- Sclerotinia-teenwoordigheid in sonneblom- en sojaboonsaad.
- Alternaria in sonneblom.
- Nuwe kultivars teenoor nuwe aktiewe bestanddele.
- Mieliekultivar evaluasie proewe.
- SANSOR-sertifiseringskema.
- Moontlike alternatief vir saadbehandeling met tiraam.

Die kunsmisbedryf

Al hoe meer kunsmis word na Suid-Afrika ingevoer. Dit is nie noodwendig as gevolg van 'n groter vraag in Suid-Afrika nie, maar as gevolg van 'n afname in die plaaslike produksie van kunsmis. Volgens Fertasa het die invoere na Suid-Afrika soos volg daar uitgesien:

Invoere van kunsmis na Suid-Afrika:

- Die invoer van kunsmis het aansienlik toegeneem – van 1,9 miljoen ton in 2016 na 2,2 miljoen ton in 2017. Uitvoere het toegeneem vanaf 0,75 miljoen ton in 2016 na 0,83 miljoen ton in 2017.
- Die netto invoere het dus vir 2017 met altesaam 26% gestyg – hoofsaaklik as gevolg van netto invoere van 14% meer ureum en 39% meer invoere van MAP.
- Totale kunsmisverbruik in Suid-Afrika vir 2016/2017 is ongeveer 2,2 miljoen fisiese ton kunsmis, wat 446 000 ton stikstof (N) verteenwoordig, 110 000 ton fosfaat (P) en 103 000 ton kalium (K). (Hierdie syfers se oorsprong is Fertasa se berekeninge op grond van gewasaanplantings).

KUNSMISPRYSE

Vanaf September 2017 tot September 2018 het die internasionale prys van ammoniak, ureum, DAP en kaliumchloried beduidend gestyg. **Tabel 1** toon die jaar-tot-jaar-prysveranderinge van internasionale kunsmispryse in dollar-terme.

1 International fertiliser prices in dollar terms
Internasionale kunsmispryse in dollar-terme

Fertiliser Kunsmis	September 2017 (USD/ton)	September 2018 (USD/ton)	% change % verandering
Ammonia (Middle East)/Ammoniak (Midde-Ooste)	246	351	+42,7
Urea (46) (Eastern Europe)/Ureum (46) (Oos-Europa)	237	273	+15,2
DAP (USA Gulf)/DAP (VSA Golf)	339	438	+29,2
KCL (CIS)	235	260	+10,5
R/$ exchange rate/R/$-wisselkoers	**13,16**	**14,76**	**+12,2**

During the period under review, the exchange rate weakened by 12,2%. The effect of a weaker exchange rate from R13,16/$ in September 2017 to R14,76/$ in September 2018 has caused international prices to increase even more in rand value. **Table 2** indicates international fertiliser prices in rand terms, which shows the effect of the weaker exchange rate on price increases.

Gedurende die oorsigtydperk het die wisselkoers met 12,2% verswak. Die effek van 'n swakker wisselkoers vanaf R13,16/$ in September 2017 tot R14,76/$ in September 2018 het veroorsaak dat internasionale pryse nog verder in rand-waarde styg. **Tabel 2** dui internasionale kunsmispryse in rand-terme aan, wat die uitwerking van die swakker wisselkoers op prysverhogings toon.

2 International fertiliser prices in rand terms / Internasionale kunsmispryse in rand-terme

Fertiliser Kunsmis	September 2017 (R/ton)	September 2018 (R/ton)	% change % verandering
Ammonia (Middle East)/Ammoniak (Midde-Ooste)	3 237	5 156	+59
Urea (46) (Eastern Europe)/Ureum (46) (Oos-Europa)	3 119	4 010	+29
DAP (USA Gulf)/DAP (VSA Golf)	4 461	6 434	+44
KCL (CIS)	3 096	3 819	+23

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.

Local fertiliser prices between September 2017 and September 2018 also indicate a significant increase in prices. **Graph 3** below indicates the upward trend in international fertiliser prices over the past year (evident from the vertical blue line).

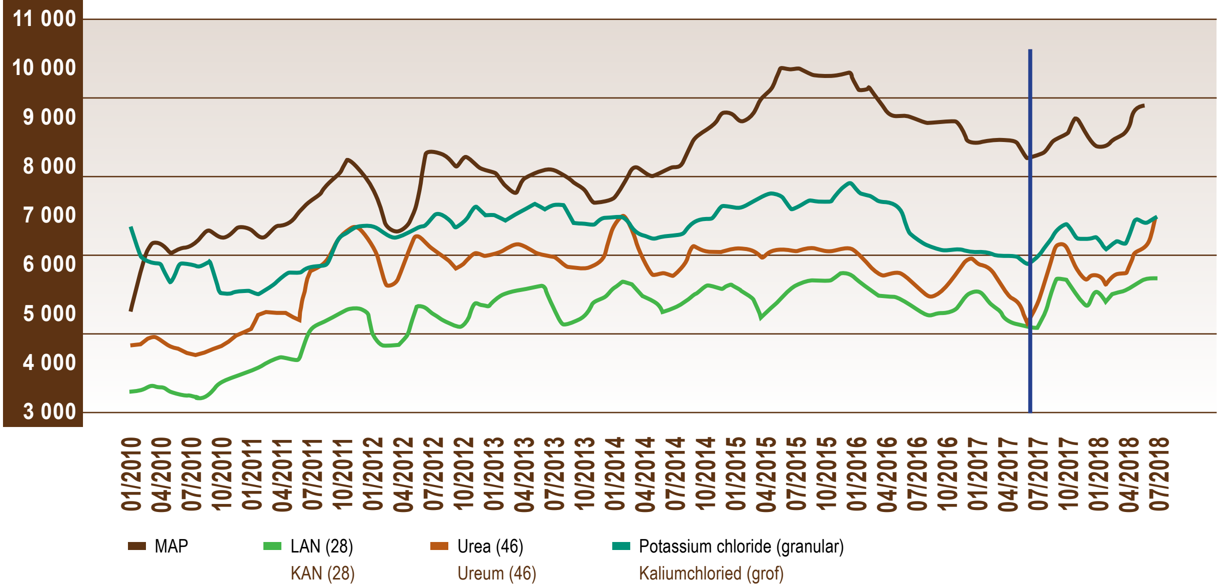
Graph 4 shows the fertiliser price index, compared to the maize price index since the 1985/1986 production season. At an estimated

Suid-Afrika voer meer as 80% van sy kunsmisbehoeftes 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.

Plaaslike kunsmispryse tussen September 2017 en September 2018 dui ook op 'n beduidende styging. **Grafiek 3** hiernaas toon die opwaartse tendens in internasionale kunsmispryse oor die afgelope jaar (die vertikale blou lyn).

Grafiek 4 toon die kunsmisprysindeks vergeleke met die mielieprysindeks sedert die 1985/1986-produksieseisoen. Teen 'n

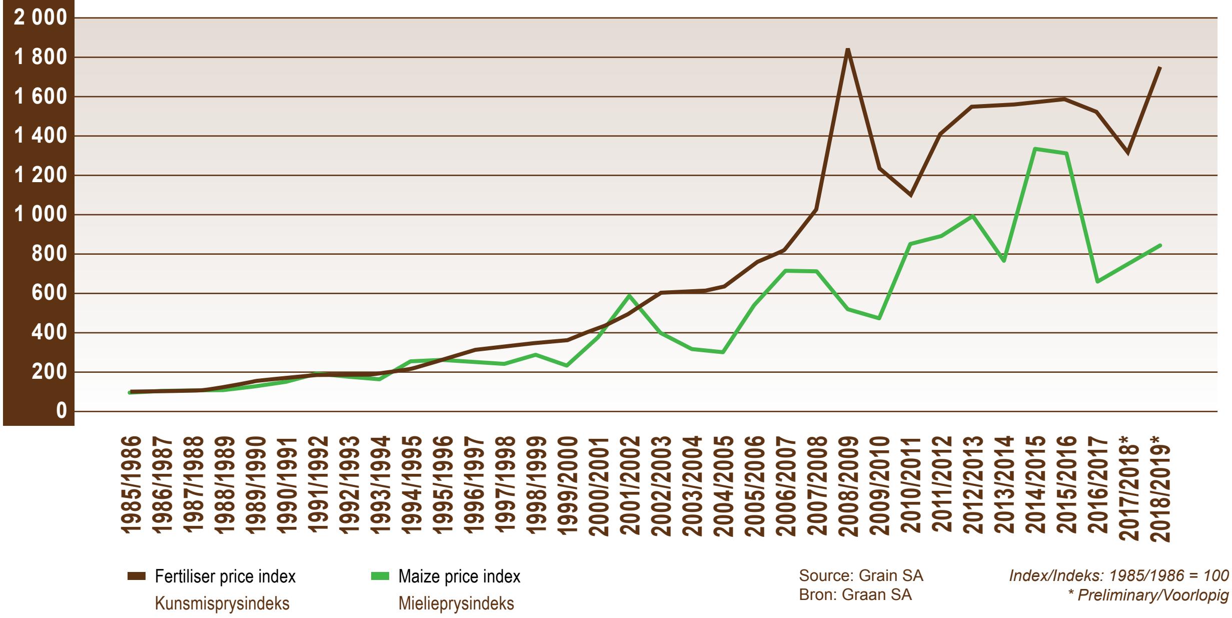
3 Local fertiliser prices / Plaaslike kunsmispryse



3 Local fertiliser prices / Plaaslike kunsmispryse

Fertiliser Kunsmis	September 2017 (R/ton)	September 2018 (R/ton)	% change % verandering
LAN (28)/KAN (28)	4 744	5 742	+21,0
Urea (46)/Ureum (46)	5 228	6 953	+33,0
MAP	8 254	9 398	+13,9
KCL/KCl	6 179	6 979	+12,9

4 **Indices of the producer price of maize and the prices of fertiliser**
Indeks van die produsenteprys van mielies en die prys van kunsmis



Source: Grain SA
Bron: Graan SA

Index/Indeks: 1985/1986 = 100
** Preliminary/Voorlopig*

average producer price[2] of R1 984/ton for the coming production season (2018/2019), the fertiliser price index is rising more sharply than the maize price index. Therefore, the gap between the two indices has widened further.

ANNUAL MEETING WITH FERTASA

The annual meeting between Grain SA and the Fertiliser Association of Southern Africa (Fertasa) took place on 26 July 2018.

Important matters discussed at the meeting include:

- Market trends in the grain and oilseed industry and production costs for the 2018/2019 production season.
- Fertiliser costs and sustainable grain production against export parity.
- International and local situation in the fertiliser industry.
- The availability of fertiliser and transport logistics.
- Lime industry trends.
- SA's dependence on imports.
- The fertiliser and lime monitoring project.
- Fertiliser Bill.
- Situation at Foskor.

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 carefully monitored as these play an important role in domestic price trends.

Table 4 (on page 94) shows the international prices of the active ingredients of five herbicides used in maize. The prices are in both dollar terms and rand terms.

Except for metolachlor, international herbicide price trends show increases year-on-year. From September 2017 to September 2018, international prices of glyphosate increased by 4,8%, while acetochlor, atrazine and trifluralin also indicated increases of 14,4%, 7,8% and 7,4%, respectively. Metolachlor was the exception, decreasing by 4,5%. In the same period, the R/$ exchange rate weakened by 12,2%.

geraamde gemiddelde produsenteprys[2] van R1 984/ton vir die komende produksieseisoen (2018/2019), styg die kunsmisprysindeks skerper as die mielieprysindeks. Die gaping tussen die twee indekse het dus verder vergroot.

JAARLIKSE VERGADERING MET FERTASA

Die jaarlikse vergadering tussen Graan SA en die Kunsmisvereniging van Suider-Afrika (Fertasa) het op 26 Julie 2018 plaasgevind.

Belangrike sake wat tydens die vergadering bespreek is, sluit in:

- Marktendense in die graanbedryf en produksiekoste vir die 2018/2019-produksieseisoen.
- Kunsmiskoste en volhoubare graanproduksie teen uitvoerpariteit.
- Internasionale en plaaslike situasie in die kunsmisbedryf.
- Die beskikbaarheid van kunsmis en vervoerlogistiek.
- Tendense in die kalkbedryf.
- SA se afhanklikheid van invoere.
- Die kunsmis- en kalkmoniteringsprojek.
- Kunsmiswetsontwerp.
- Situasie by Foskor.

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 versigtig gemoniteer, aangesien dit 'n belangrike rol in plaaslike prystendense speel.

Tabel 4 (op bladsy 94) toon die internasionale pryse van die aktiewe bestanddele van onkruiddoders wat by mielies gebruik word. Die pryse is in dollar- sowel as in rand-terme.

Buiten vir metolachloor toon internasionale onkruiddoderprystendense jaar-tot-jaar-stygings. Vanaf September 2017 tot September 2018 het die internasionale pryse van glifosaat met 4,8% gestyg, terwyl asetochloor, atrasien en trifluralien ook toenames van 14,4%, 7,8% en 7,4% onderskeidelik toon. Metolachloor was die uitsondering en het met 4,5% gedaal. In dieselfde tydperk het die R/$-wisselkoers met 12,2%

[2] *Average producer price = Safex, July 2018 price - average differential cost - handling costs*
[2] *Gemiddelde produsenteprys = Safex, Julie 2018-prys - gemiddelde differensiële koste - hanteringskoste*

4 International herbicide prices (year-on-year change [Sept 2017 - Sept 2018])
Internasionale onkruiddoderpryse (jaar-tot-jaar-verandering [Sept 2017 - Sept 2018])

	September 2017 (USD/ton)	September 2018 (USD/ton)	% change % verandering
Glyphosate/Glifosaat (95%)	4 262	4 467	+4,8%
Acetochlor/Asetochloor (92%)	3 218	3 680	+14,4%
Atrazine/Atrasien (97%)	3 117	3 359	+7,8%
Metolachlor/Metolachloor (97%)	3 928	3 750	-4,5%
Trifluralin/Trifluralien (95%)	4 521	4 854	+7,4%
International herbicide prices – year-on-year change Internasionale onkruiddoderpryse – jaar-tot-jaar-verandering			
	September 2017 (R/ton)	**September 2018 (R/ton)**	**% change % verandering**
Glyphosate/Glifosaat (95%)	56 087	65 927	+17,5%
Acetochlor/Asetochloor (92%)	42 349	54 315	+28,3%
Atrazine/Atrasien (97%)	41 014	49 581	+20,9%
Metolachlor/Metolachloor (97%)	51 692	55 356	+7,1%
Trifluralin/Trifluralien (95%)	59 491	71 650	+20,4%

The impact of the depreciation can be seen when international dollar prices are converted to rand, which meant that increases were more than in dollar terms.

Table 5 shows international insecticide prices, which are also used in maize (dollar and rand terms). Lambda-cyhalothrin and carbofuran both show significant increases of 79,1% and 25,2%, respectively; while imidacloprid and deltamethrin decreased by 1,6% and 5,1%, respectively. International prices in rand terms illustrate the effect of the weakening of the exchange rate.

verswak. Die impak van die waardevermindering kan gesien word wanneer internasionale dollar-pryse na rand omgeskakel word, wat beteken dat stygings groter was as in dollar-terme.

Tabel 5 toon die internasionale pryse van insekdoders wat ook op mielies gebruik word (dollar- en rand-terme). Lambda-sihalotrien en karbofuraan toon albei beduidende stygings van 79,1% en 25,2% onderskeidelik, terwyl imidaklopried en deltametrien met 1,6% en 5,1% onderskeidelik gedaal het. Internasionale pryse in rand-terme illustreer die uitwerking van die verswakking van die wisselkoers.

5 International insecticide prices (year-on-year change [Sept 2017 - Sept 2018])
Internasionale insekdoderpryse (jaar-tot-jaar-verandering [Sept 2017 - Sept 2018])

	September 2017 (USD/ton)	September 2018 (USD/ton)	% change % verandering
Imidacloprid/Imidaklopried (95%)	25 227	24 829	-1,6
Lambda-cyhalothrin/Lambda-sihalotrien (95%)	26 319	47 148	+79,1
Carbofuran/Karbofuraan (99%)	10 593	13 267	+25,2
Deltamethrin/Deltametrien (98%)	96 223	91 292	-5,1
International insecticide prices – year-on-year change Internasionale insekdoderpryse – jaar-tot-jaar-verandering			
	September 2017 (R/ton)	**September 2018 (R/ton)**	**% change % verandering**
Imidacloprid/Imidaklopried (95%)	332 993	366 471	+10,1
Lambda-cyhalothrin/Lambda-sihalotrien (95%)	347 414	695 899	+100,3
Carbofuran/Karbofuraan (99%)	139 826	195 826	+40,0
Deltamethrin/Deltametrien (98%)	1 270 141	1 347 472	+6,1

ANNUAL MEETING WITH THE CROP PROTECTION INDUSTRY

On 30 July 2018, 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 2018/2019 production season.
- Changes at CropLife.
- The international and local situation in the agrochemical industry.

JAARLIKSE VERGADERING MET DIE GEWASBESKERMINGSBEDRYF

Op 30 Julie 2018 het Graan SA se Produksie/inset-werkgroep met CropLife vergader, en die volgende sake is bespreek:

- Marktendense in die graanbedryf en produksiekoste vir die 2018/2019-mielieproduksieseisoen.
- Veranderinge by CropLife.
- Die internasionale en plaaslike situasie in die landbouchemikalieëbedryf.

- Price trends and availability of agrochemicals.
- National Agricultural Marketing Council (NAMC) value chain study.
- Progress with normal registration.
- Association of Veterinary and Crop Associations of South Africa (AVCASA) waste management programme.
- Clear indications of active ingredients on labels for chemicals – uniformity of a product throughout the season and colours of drum caps.
- New cultivars versus new active ingredients.
- Quality monitoring.
- New charts for chemical groups.

Diesel industry

During the reporting period, the domestic wholesale price of diesel in Gauteng increased by 29%, from R12,12 per litre in October 2017 to R15,64 per litre in October 2018.

PRICES

The factors that influence the local fuel price movements are Brent crude oil prices and the R/$ exchange rate, as well as local fuel levies. **Graph 5** below shows the international Brent crude oil prices and the Gauteng wholesale prices for diesel over time. Over a period of a year, Brent crude oil prices increased by 43% from US$55,33 per barrel in September 2017 to US$79,13 per barrel in September 2018. Over the same period, the rand weakened against the dollar from R13,16 to R14,76. The impact of an increase in Brent crude oil prices and a weaker rand led to the significant increase in domestic wholesale prices of diesel.

- Prystendense en beskikbaarheid van landbouchemikalieë.
- Nasionale Landboubemarkingsraad (NLBR) se waardekettingstudie.
- Vordering met normale registrasie.
- Vereniging van Veterinêre- en Gewasverenigings van Suid-Afrika (AVCASA) se afvalbestuursprogram.
- Duidelike aanduidings van aktiewe bestanddele op etikette vir chemikalieë – eenvormigheid van 'n produk regdeur die seisoen en kleure van dromme se proppe.
- Nuwe kultivars teenoor nuwe aktiewe bestanddele.
- Kwaliteitsmonitering.
- Nuwe kaarte vir groepe chemiese stowwe.

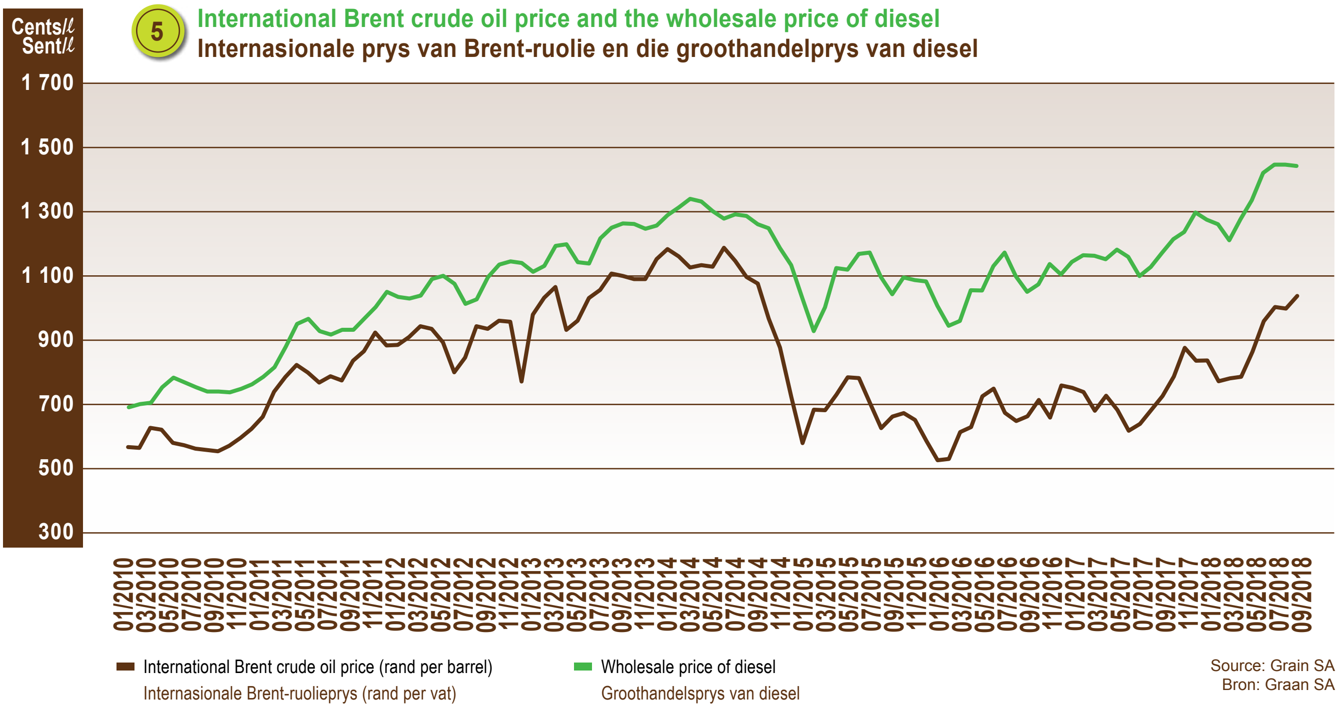
Dieselbedryf

Die plaaslike groothandelprys van diesel in Gauteng het in die oorsigtydperk met 29% vanaf R12,12 per liter in Oktober 2017 tot R15,64 per liter in Oktober 2018 gestyg.

PRYSE

Die faktore wat die plaaslike brandstofprysbewegings beïnvloed, is Brent-ruoliepryse en die R/$-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 die Brent-ruolie se prys met 43% gestyg – vanaf US$55,33 per vat in September 2017 tot US$79,13 per vat in September 2018. Oor dieselfde tydperk het die rand vanaf R13,16 tot R14,76 teenoor die dollar verswak. Die impak van 'n styging in Brent-ruolie se prys en 'n swakker rand het tot 'n beduidende styging in die plaaslike groothandelprys van diesel gelei.

5 International Brent crude oil price and the wholesale price of diesel
Internasionale prys van Brent-ruolie en die groothandelprys van diesel



The maize price index and the diesel price index are shown in **Graph 6**. Given an expected producer price[3] of R1 984/ton for maize for the coming season and the significant increase in diesel prices, the ratio between the diesel price and the maize price is significantly weaker.

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 2018 the Minister of Finance announced that the general fuel levy and the Road Accident Fund levy would increase by 22c/litre and 30c/litre respectively in April 2018. This meant that the diesel rebate increased from 283c/litre to 321,8c/litre in April for 80% of legal use. **Graph 7** illustrates how the diesel rebate increased over time.

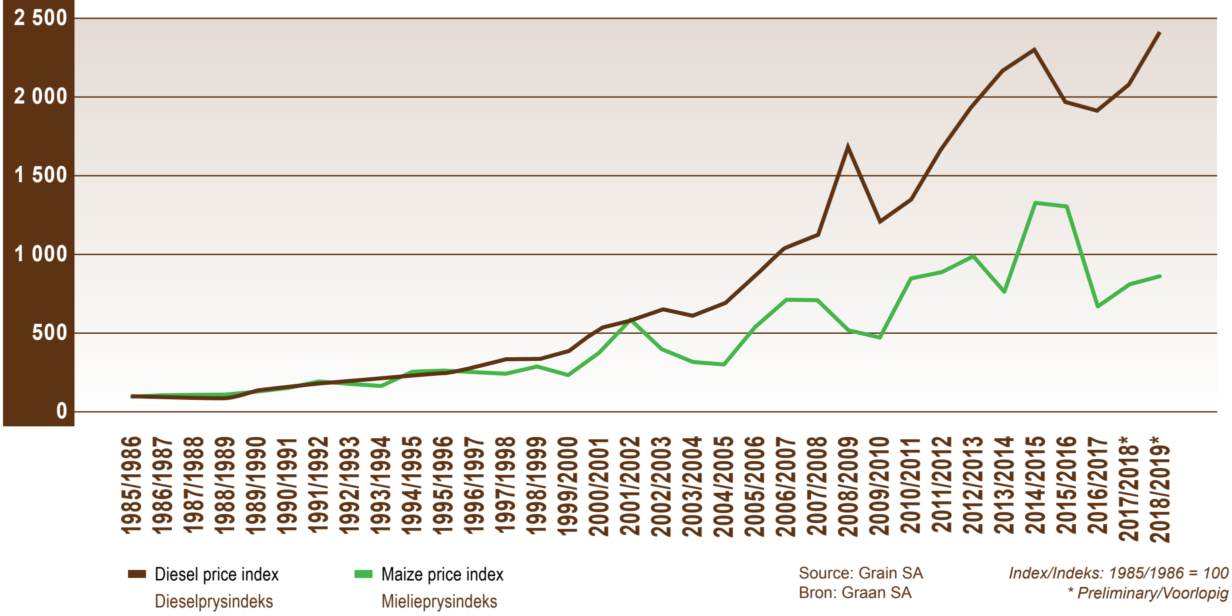
Die mielieprysindeks en die dieselprysindeks word in **Grafiek 6** getoon. Gegewe 'n verwagte produsenteprys[3] van R1 984/ton vir mielies vir die komende seisoen en die beduidende styging in die dieselprys is die verhouding tussen die dieselprys en die mielieprys aansienlik swakker.

DIESELRABAT

Die dieselrabat waarvoor produsente kwalifiseer, bestaan uit 40% van die algemene brandstofbelasting en 100% van die Padongelukfondsheffing.

Die Minister van Finansies het in Februarie 2018 aangekondig dat die algemene brandstofheffing en die Padongelukfondsheffing in April 2018 met 22c/liter en 30c/liter onderskeidelik gaan toeneem. Dit het meegebring dat die dieselrabat vanaf 283c/liter na 321,8c/liter in April toegeneem het – vir 80% van regmatige gebruik. **Grafiek 7** illustreer hoe die dieselrabat oor tyd toegeneem het.

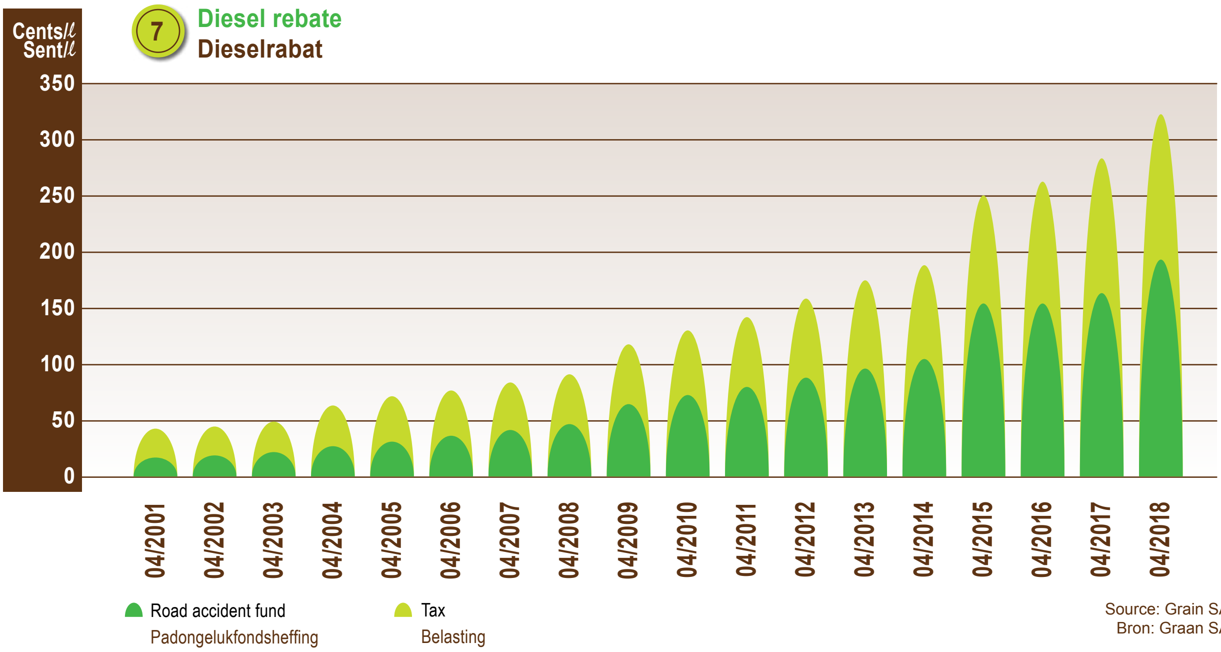
6 Indices of the producer price of maize and the wholesale price of diesel
Indeks van die produsenteprys van mielies en die groothandelprys van diesel



Source: Grain SA
Bron: Graan SA

Index/Indeks: 1985/1986 = 100
** Preliminary/Voorlopig*

7 Diesel rebate
Dieselrabat



Source: Grain SA
Bron: Graan SA

[3] Average producer price = Safex, July 2018 price - average differential cost - handling costs
[3] Gemiddelde produsenteprys = Safex, Julie 2018-prys - gemiddelde differensiële koste - hanteringskoste

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 cashflow problems. There were some delays in pay-outs by SARS without reasons given for the delays, whilst others were due to audits that have been done; challenges with communication and interpretation of logbook entries. Frequent meetings were held with SARS' head office in this regard. Grain SA also participated with Agri SA and the South African Institute of Tax Practitioners (SAIT) in a questionnaire, where valuable information was obtained that could be taken up with SARS and Treasury. Frequent discussions were also held with the Tax Ombud to bring problems experienced with delays to the attention of his office.

In 2017, Treasury published a discussion document for a new diesel rebate system. Grain SA commented on this. Treasury and SARS held industry workshops in August 2018 where the proposals for the diesel rebate review were properly discussed. In September 2018, Grain SA also finally commented on the proposed changes.

The agricultural machinery industry

Due to advanced international technology, South Africa imports most of its agricultural machines, once again making the R/$ 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 decreased on average by 2,3% from August 2017 to August 2018, and by 2,7% from September 2017 to September 2018. The year-on-year trend with respect to the change in the price decrease of the four classes of agricultural machinery, namely tractors, combine harvesters, hay and forage equipment as well as implements, on an annual basis, is displayed in **Table 6**.

DIESELRABAT

Die dieselrabat het weer eens in hierdie verslagdoeningstydperk prioriteitsaandag ontvang. Vertragings in die betaling van die dieselrabat en BTW-eise het veroorsaak dat produsente ernstige kontantvloeiprobleme ervaar het. Daar was vertragings in uitbetalings deur die SAID sonder dat redes vir die vertragings gegee word, terwyl ander die gevolg was van oudits wat gedoen is; uitdagings met kommunikasie en vertolking van logboekinskrywings. Gereelde vergaderings is met die SAID se hoofkantoor in hierdie verband gehou. Graan SA het ook met Agri SA en Suid-Afrikaanse Instituut van Belastingkundiges (SAIB) saamgewerk aan 'n vraelys wat waardevolle inligting verkry het wat met die SAID en Tesourie opgevolg kon word. Gereelde gesprekke is ook met die Belastingombud gevoer om probleme wat met vertragings ervaar word onder sy kantoor se aandag te bring.

In 2017 het die Tesourie 'n besprekingsdokument oor die nuwe dieselkortingstelsel gepubliseer. Graan SA het hieroor kommentaar gelewer. Die Tesourie en die SAID het in Augustus 2018 bedryfswerkswinkels aangebied waar die voorstelle vir die dieselkortinghersiening behoorlik bespreek is. In September 2018 het Graan SA ook finale kommentaar oor die beoogde veranderinge verskaf.

Die landboumasjineriebedryf

As gevolg van gevorderde internasionale tegnologie voer Suid-Afrika die meeste van sy landboumasjinerie in, wat weer eens die R/$-wisselkoers 'n belangrike faktor in prysbepaling maak. 'n Versterking van die rand dra dus tot laer pryse op landboumasjinerie by, terwyl 'n swakker rand tot hoër pryse bydra.

PRYSE

Die prys van landboumasjinerie het gemiddeld met 2,3% gedaal vanaf Augustus 2017 tot Augustus 2018, en met 2,7% van September 2017 tot September 2018. Die jaar-tot-jaar-tendens ten opsigte van die verandering in die prysdaling van die vier klasse landboumasjinerie, naamlik trekkers, stropers, hooi- en voertoerusting en implemente word in **Tabel 6** getoon.

6 Price changes in agricultural machinery equipment
Prysveranderings in landboumasjinerietoerusting

Equipment class / Toerustingklas	Year-on-year change (%) / Jaar-tot-jaar-verandering (%)		Trend / Tendens
	August/Augustus 2018	September 2018	
Tractors/Trekkers	-5,4	-5,1	Up/Opwaarts
Combine harvesters/Stropers	+3,4	+2,0	Down/Afwaarts
Hay and forage equipment/Hooi- en veevoertoerusting	-0,9	-2,0	Down/Afwaarts
Implements/Implemente	-0,7	-1,1	Down/Afwaarts
General/Algemeen	**-2,3**	**-2,7**	**Down/Afwaarts**

Source/ Bron: AGFACTS

Graph 8 (on page 98) 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 closed up a bit – especially due to lower tractor prices over the past year.

TRACTOR SALES

Graph 9 (on page 98) depicts what is currently happening to tractor sales in the South African market. Note that these figures exclude exports and only include local sales. Annual tractor sales during this period (1995 - 2017) varied between a minimum of 2 624 units in 1999 and a maximum of 7 899 units in 2012. Between 2016 and 2017, tractor sales increased by 8,7%, from 5 854 in 2016 to 6 362 units in 2017.

Grafiek 8 (op bladsy 98) vergelyk die prysindekse van trekkerpryse en die mielieprys sedert 1985/1986. Uit die grafiek is dit duidelik dat die prysverhouding tussen die trekkers en die mielieprys effens verklein het – veral as gevolg van laer trekkerpryse die afgelope jaar.

TREKKERVERKOPE

Grafiek 9 (op bladsy 98) toon wat tans in die Suid-Afrikaanse mark met trekkerverkope gebeur. Let daarop dat hierdie syfers uitvoere uitsluit, en slegs plaaslike verkope insluit. Jaarlikse trekkerverkope in hierdie tydperk (1995 - 2017) het gewissel tussen 'n minimum van 2 624 eenhede in 1999 en 7 899 eenhede in 2012. Tussen 2016 en 2017 het trekkerverkope met 8,7% gestyg – vanaf 5 854 in 2016 tot 6 362 eenhede in 2017.

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 reduced summer and winter grain plantings over time, as well as the increased sales of bigger than average sized (kW) tractors.

TRACTOR AGE

Currently the average age of tractors in the tractor fleet is seven years. **Graph 11** below indicates the trend in the age distribution of the tractor fleet. The percentage of tractors that are older than ten years is trending downwards, while that of tractors younger than ten years is trending upwards. The total number of tractors younger than ten years is currently about 62 600 units, which constitutes 71% 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.

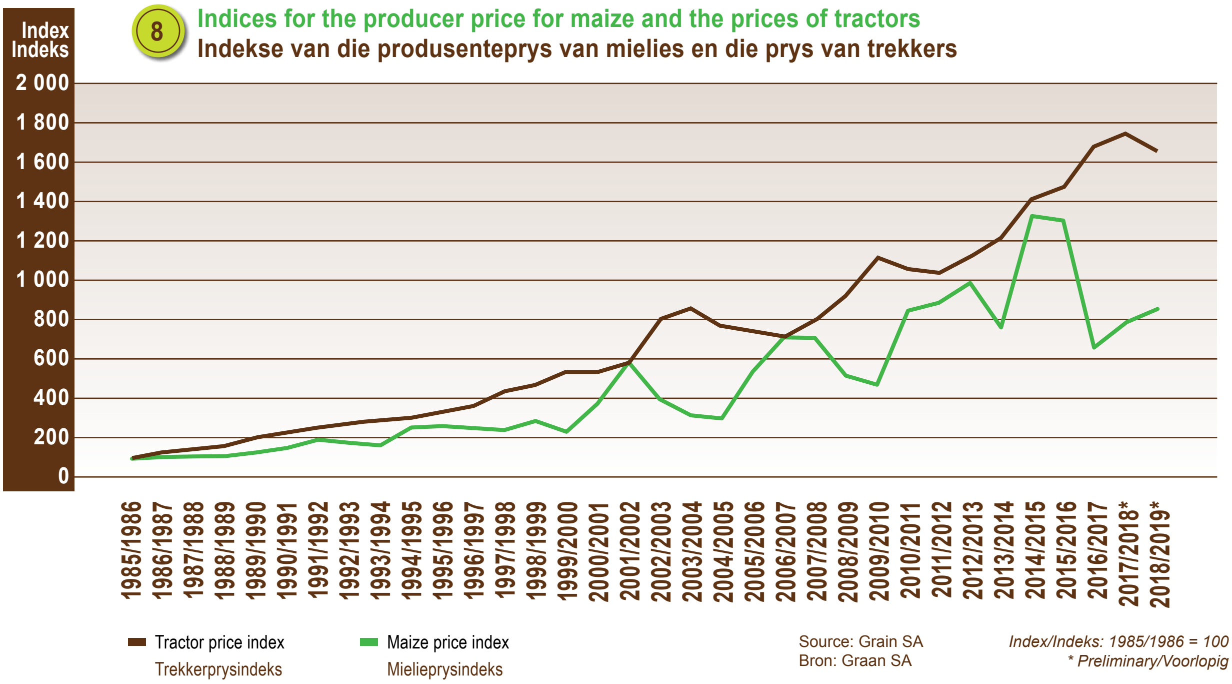
TREKKERVLOOT

Die land se huidige trekkervloot is 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 verhoogde verkope van groter as gemiddelde (kW) trekkers.

TREKKEROUDERDOM

Die gemiddelde ouderdom van trekkers in die trekkervloot is tans sewe jaar. **Grafiek 11** hieronder toon die tendens in die ouderdomsverspreiding van die trekkervloot. Die persentasie trekkers wat ouer as tien jaar is, neig afwaarts, terwyl dié van trekkers jonger as tien jaar styg. Die totale getal trekkers jonger as tien jaar oud is tans ongeveer 62 600 eenhede, wat 71% van die huidige trekkervloot beslaan. Die persentasie trekkers jonger as tien jaar was in 1993 op 'n laagtepunt, toe 35,8% van die trekkervloot jonger as tien jaar was.

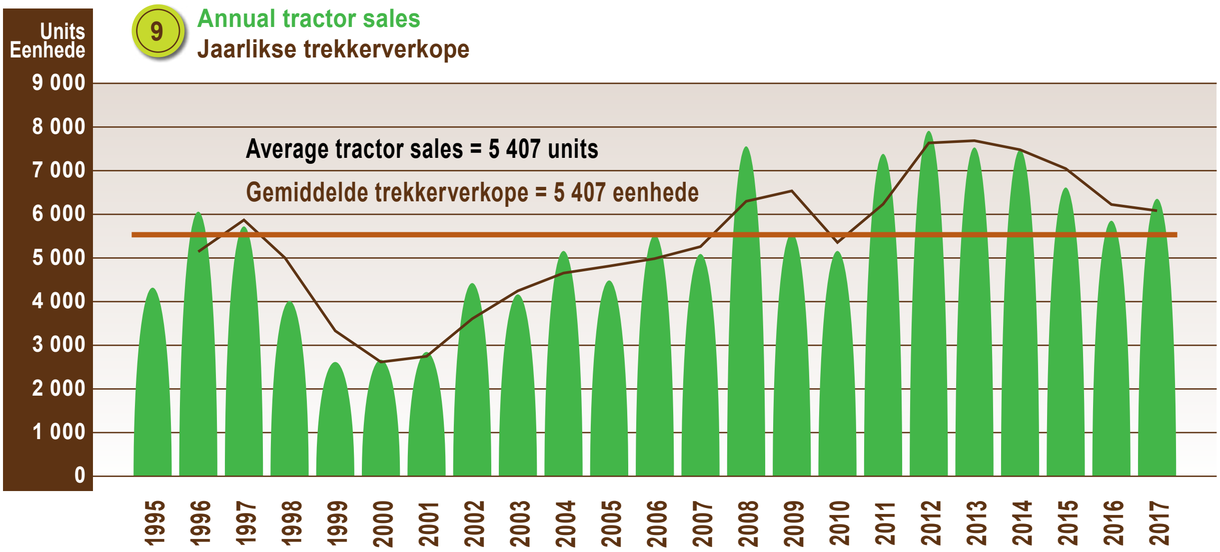
8 **Indices for the producer price for maize and the prices of tractors**
Indekse van die produsenteprys van mielies en die prys van trekkers



Source: Grain SA
Bron: Graan SA

Index/Indeks: 1985/1986 = 100
** Preliminary/Voorlopig*

9 **Annual tractor sales**
Jaarlikse trekkerverkope



Source: Grain SA
Bron: Graan SA

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. A sharp increase occurred over the past eight years.

In 1995 het die totale trekkers jonger as tien jaar 36,7% van die vloot beslaan, waarna die grootte van die trekkervloot jonger as tien jaar toenemend begin groei het. 'n Skerp toename het in die afgelope agt jaar plaasgevind.

CAPACITY OF TRACTOR FLEET

The total tractive power in the South African tractor fleet currently stands at 6,89 million kW (**Graph 12** on page 100). This has increased sharply since the tractive power reached a minimum of 4,26 million kW.

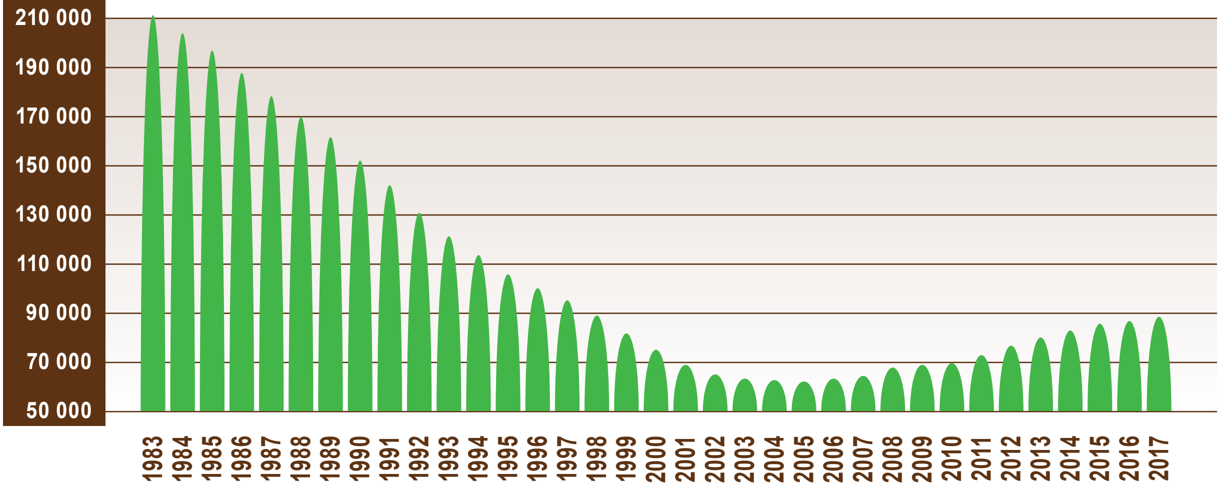
The average tractive power (kW) of tractors in the total tractor fleet increased gradually over the past few years. This increase in the average tractive power can be seen in **Graph 13** (on page 100) – it increased from 72,3 kW ten years ago to the current 78,1 kW.

KAPASITEIT VAN DIE TREKKERVLOOT

Die totale trekkrag in die Suid-Afrikaanse trekkervloot staan tans op 6,89 miljoen kW (**Grafiek 12** op bladsy 100). Dit het skerp toegeneem sedert die trekkrag 'n minimum van 4,26 miljoen kW bereik het.

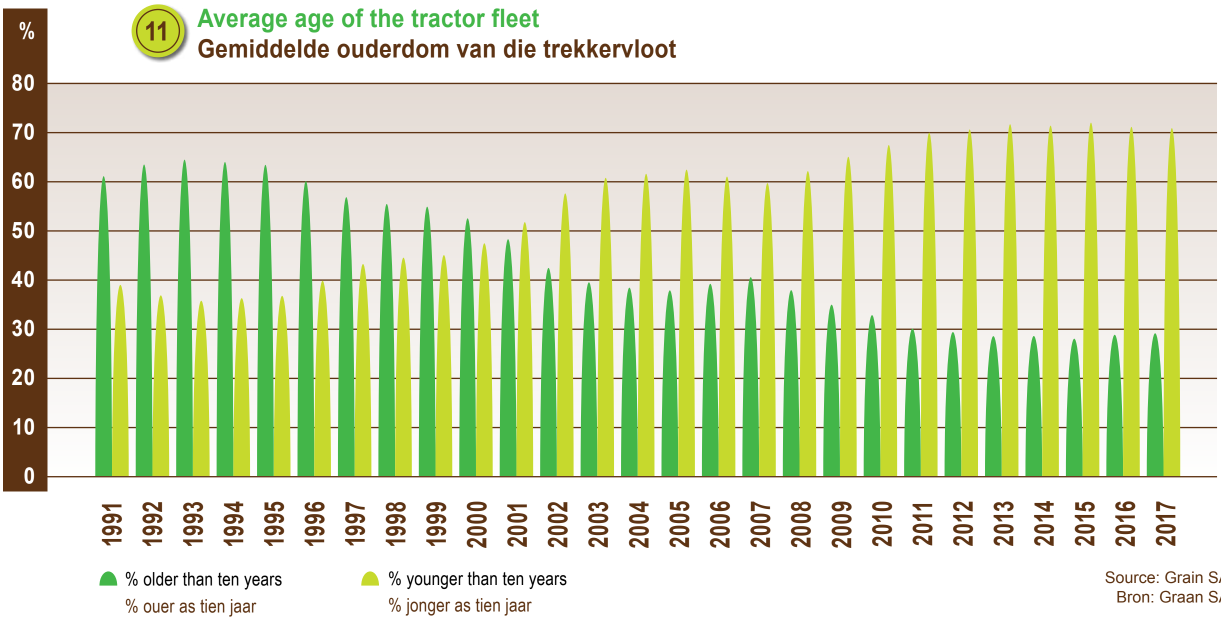
Die gemiddelde krag (kW) van trekkers in die totale trekkervloot het die afgelope paar jaar geleidelik toegeneem. Hierdie styging in gemiddelde krag kan in **Grafiek 13** (op bladsy 100) gesien word; dit het vanaf 72,3 kW (tien jaar gelede) tot die huidige 78,1 kW toegeneem.

10 Total tractor fleet
Totale trekkervloot



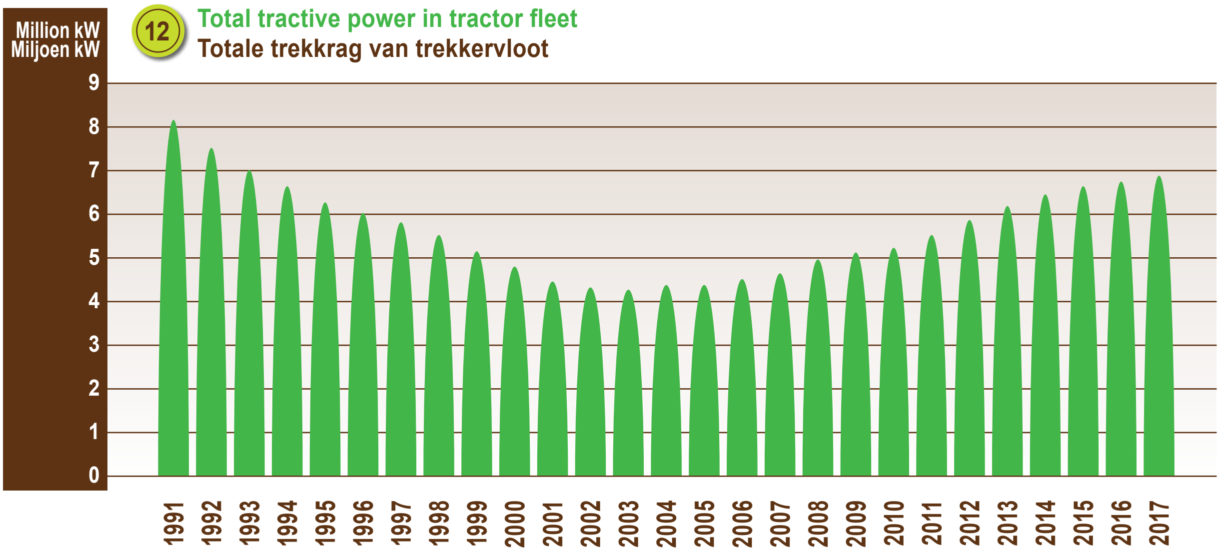
Source: Grain SA
Bron: Graan SA

11 Average age of the tractor fleet
Gemiddelde ouderdom van die trekkervloot



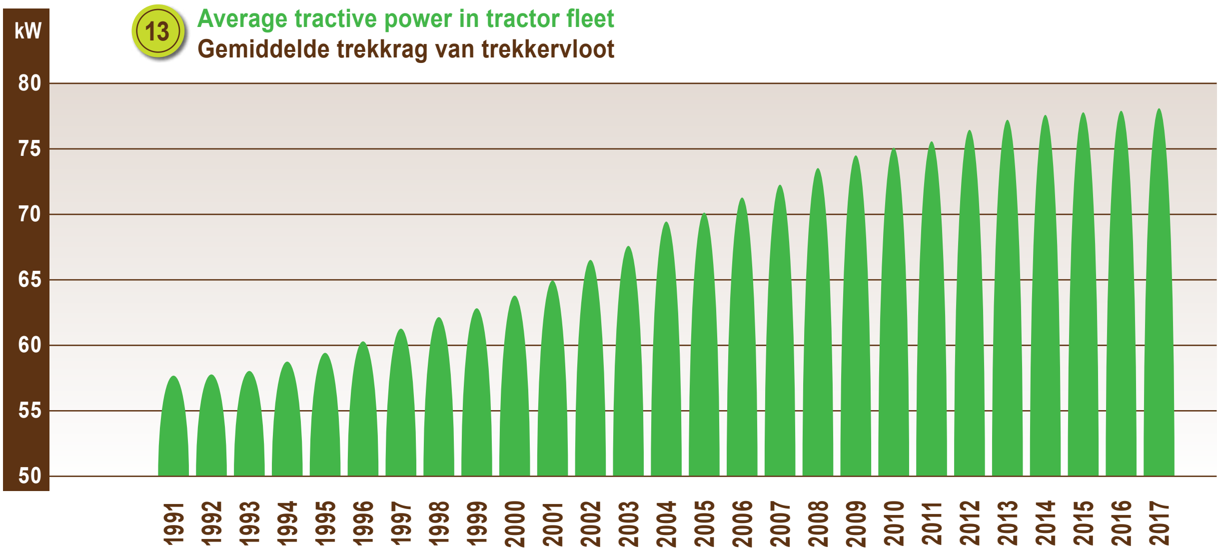
Source: Grain SA
Bron: Graan SA

12 **Total tractive power in tractor fleet**
Totale trekkrag van trekkervloot



Source: Grain SA
Bron: Graan SA

13 **Average tractive power in tractor fleet**
Gemiddelde trekkrag van trekkervloot



Source: Grain SA
Bron: Graan SA

Annual meeting with SAAMA

In 2018, Grain SA again met with the South African Machinery Association 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.
- Service delivery during planting time.
- Import rebate on tractor tyres.
- Precision support.
- Motor industry ombudsman.
- Diesel fuel quality.

Jaarlikse vergadering met SALMA

Graan SA het in 2018 weer met die Suid-Afrikaanse Landboumasjinerievereniging vergader om gemeenskaplike uitdagings in die graan- en oliesadebedryf te bespreek. Belangrike kwessies wat bespreek is, was die volgende:

- Marktendense en produksiekoste vir die graan- en oliesadebedryf.
- Tendense in die internasionale en plaaslike landboumasjineriebedryf.
- Logistiek van landboumasjinerie wat nie gelisensieer kan word nie.
- Dienslewering tydens planttyd.
- Invoerrabat op trekkerbande.
- Presisie-ondersteuning.
- Motorbedryf-ombudsman.
- Gehalte van dieselbrandstof.

OVERVIEW OF PRODUCTION COSTS

Actual production cost

Grain SA collected/bought data and information during December 2017 and January 2018 to determine the actual income and production costs of the major maize production areas for the 2016/2017 production season. Determining and gathering the historic actual income and production cost figures is important to the industry as it gives an idea of actual cost per input item and the profitability of a crop.

The actual income and production cost analysis for dry land maize for the 2016/2017 production season can be seen in **Table 1**. The table shows, for example, that the producers in specifically the North West Province and Free State Province achieved the most unfavourable prices compared to the producers in the other regions' study groups. The producer prices obtained in the North West and Eastern Free State were generally better. The table further shows that excellent yields were generally obtained.

PRODUKSIEKOSTE-OORSIG

Werklike produksiekoste

Graan SA het in Desember 2017 en Januarie 2018 data en inligting ingesamel/gekoop om die werklike inkomste en produksiekoste van die belangrikste mielieproduksiegebiede vir die 2016/2017-produksieseisoen te bepaal. Dit is vir die bedryf uiters belangrik dat die historiese werklike inkomste en produksiekostesyfers bepaal en ingesamel word, aangesien dit 'n idee gee van werklike koste per insetitem en die winsgewendheid van 'n gewas.

Die werklike inkomste en produksiekoste-ontleding vir droëlandmielies vir die 2016/2017-produksieseisoen word in **Tabel 1** getoon. Die tabel toon byvoorbeeld dat die produsente in veral Noordwes en die Vrystaat die ongunstigste pryse behaal het vergeleke met die produsente in die ander streke se studiegroepe. Die produsentepryse wat in Noordwes en die Oos-Vrystaat behaal is, was oor die algemeen beter. Die tabel toon verder dat uitstekende opbrengste in die algemeen behaal is.

1 **Actual income and production cost figures for dry land maize (2016/2017 year)**
Werklike inkomste en produksiekostesyfers vir droëlandmielies (2016/2017-jaar)

Production cost per hectare Produksiekoste per hektaar	North West Noordwes (R)	North Western Free State Noordwes-Vrystaat (R)	Eastern Free State Oos-Vrystaat (R)	KwaZulu-Natal (R)
1. Variable cost/Veranderlike koste				
Seed/Saad	677,74	855,59	1470,00	1 989,00
Fertiliser and lime/Kunsmis en kalk	1 522,56	2 482,08	2 499,00	4 052,00
Weed and pest control/Onkruid- en plaagbeheer	818,20	714,65	1175,00	1 245,00
Fuel/Brandstof	540,81	757,70	997,00	997,00
Repairs and parts/Herstelwerk en onderdele	428,54	569,51	1 140,00	1 029,00
Crop insurance/Gewasversekering	90,36	86,68	362,00	324,00
Casual labour/Losarbeid	127,19	55,73	63,00	92,00
Permanent labour/Permanente arbeid	334,89	310,54	880,00	927,00
License and insurance/Lisensie en versekering	0,00	84,56	0,00	295,00
Marketing cost/Bemarkingskoste	260,00	68,89	85,00	0,00
Drying and cleaning cost/Droog- en skoonmaakkoste	0,00	35,90	278,00	0,00
Interest on production credit/Rente op produksiekrediet	381,77	510,19	748,43	852,15
Contract work/Kontrakwerk	53,46	241,60	258,00	305,00
Other cost/Ander koste	236,54	539,16	772,00	107,00
Total variable cost/Totale veranderlike koste	**5 472,06**	**7 312,78**	**10 727,43**	**12 214,15**
2. Capital cost/Kapitaalkoste	**1 005,61**	**1 063,27**	**849,59**	**1 430,18**
Total cost per hectare/Totale koste per hektaar	**6 477,67**	**8 376,05**	**11 577,01**	**13 644,33**
Yield/Opbrengs (t/ha)	3,98	6,84	7,00	8,00
Income/Inkomste				
Producer price/Produsenteprys (R/ton)	2 188,46	1 599,00	2 045,00	1 902,00
Producer price/Produsenteprys (R/ha)	8 710,07	10 937,16	14 315,00	15 216,00
Profit/Loss per ha/Wins/Verlies per ha	**2 232,40**	**2 561,11**	**2 737,99**	**1 571,67**

Actual income and production cost figures for dry land maize

While Table 1 depicts the actual production figures for the 2016/2017 year for the main different production regions, **Graph 1**, **2**, **3** and **4** 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 seen since 2000/2001.

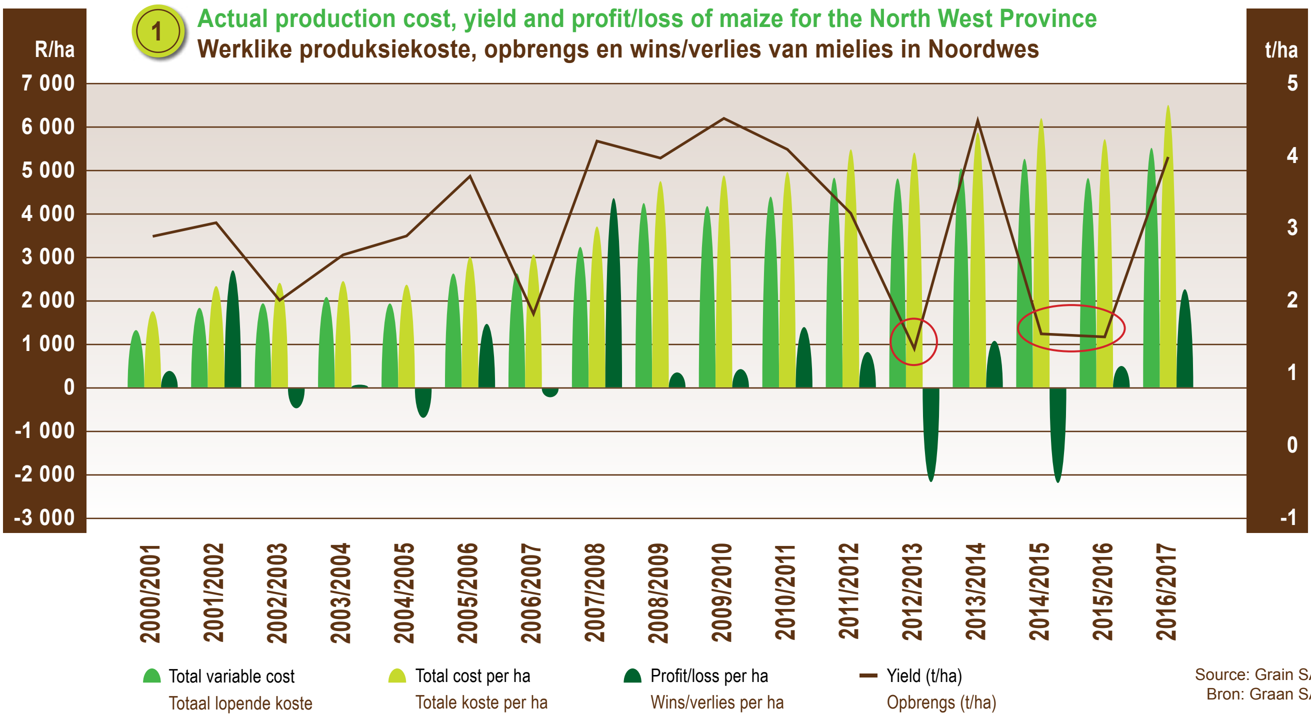
From Graphs 1 to 4, it is clear that production costs are constantly increasing over time. These increases on a year-on-year basis are fairly high and have a huge impact on producers to adapt and make adjustments with their current production systems in order to produce maize profitably.

Werklike inkomste en produksiekostesyfers vir droëlandmielies

Terwyl Tabel 1 die werklike produksiesyfers vir die 2016/2017-jaar vir die vernaamste verskillende produksiestreke aandui, verskaf **Grafiek 1, 2, 3** en **4** die langtermyn- werklike produksiekoste, opbrengste en wins/verlies-situasie van Noordwes, Noordwes-Vrystaat, Oos-Vrystaat en KwaZulu-Natal sedert 2000/2001.

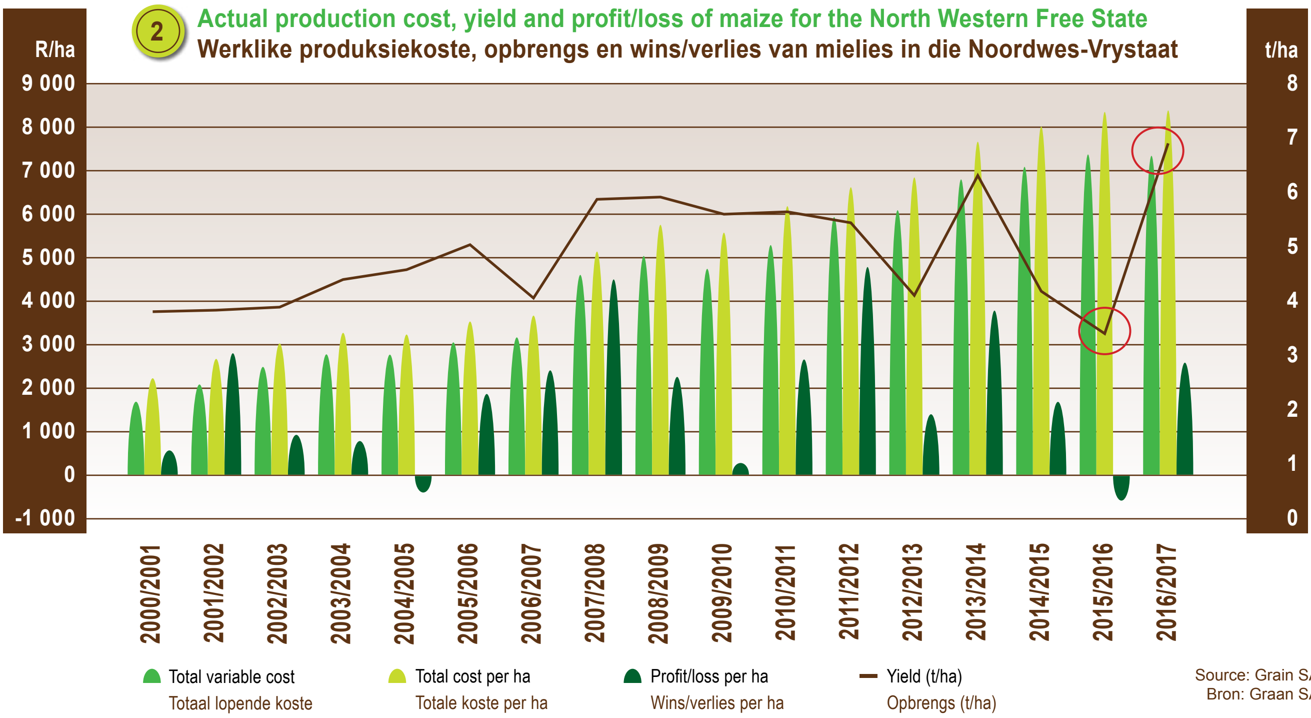
Uit Grafiek 1 tot 4 is dit duidelik dat produksiekoste met verloop van tyd voortdurend styg. Hierdie stygings op 'n jaar-tot-jaar-grondslag is redelik hoog en het 'n geweldige impak op produsente se vermoë om hulle huidige produksiestelsels aan te pas en te wysig om mielies winsgewend te plant.

1 Actual production cost, yield and profit/loss of maize for the North West Province
Werklike produksiekoste, opbrengs en wins/verlies van mielies in Noordwes



Source: Grain SA
Bron: Graan SA

2 Actual production cost, yield and profit/loss of maize for the North Western Free State
Werklike produksiekoste, opbrengs en wins/verlies van mielies in die Noordwes-Vrystaat

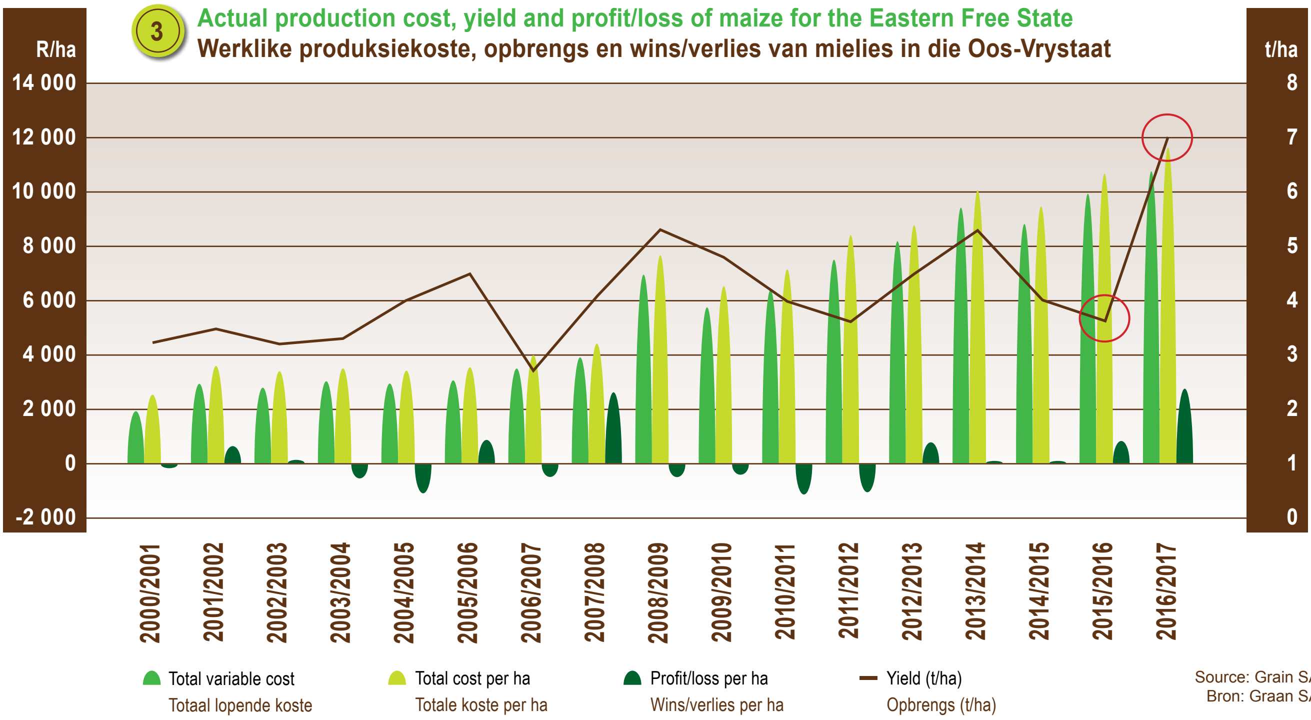


Source: Grain SA
Bron: Graan SA

Graph 1 clearly indicates that the North West Province experienced very challenging production conditions, as poor yields were achieved during the 2012/2013, 2014/2015 and 2015/2016 seasons. This region in general experienced very challenging conditions, putting pressure on profitable maize production.

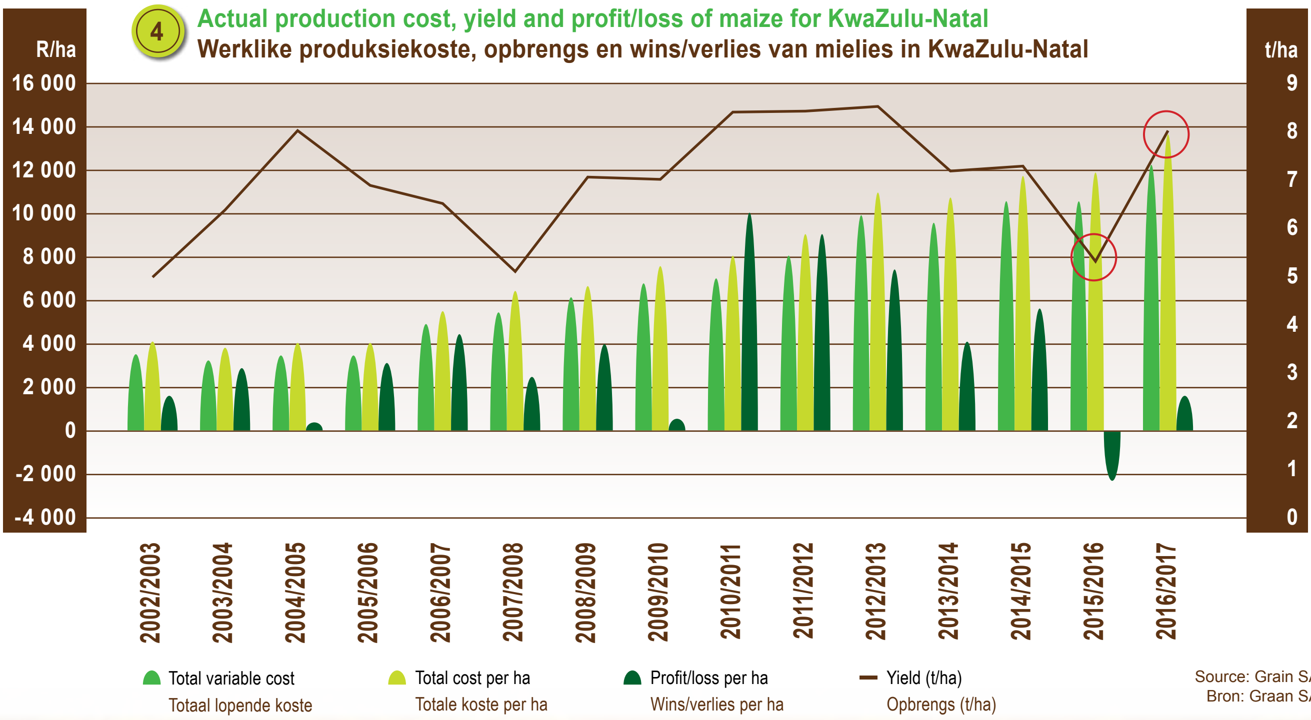
Grafiek 1 toon duidelik dat Noordwes uiters uitdagende produksietoestande ervaar het, aangesien swak opbrengste gedurende die 2012/2013-, 2014/2015- en 2015/2016-seisoen behaal is. Hierdie streek het oor die algemeen uiters uitdagende toestande ervaar, wat druk op winsgewende mielieproduksie geplaas het.

3 **Actual production cost, yield and profit/loss of maize for the Eastern Free State**
Werklike produksiekoste, opbrengs en wins/verlies van mielies in die Oos-Vrystaat



Source: Grain SA
Bron: Graan SA

4 **Actual production cost, yield and profit/loss of maize for KwaZulu-Natal**
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 on the variable costs to produce maize and, specifically, to express different variable input cost items as a percentage of the total variable input costs. **Graph 5a and 5b** shows the average percentage contribution of selected variable input costs during two different seasons for maize production in the North Western Free State. Fertiliser and lime, which are the biggest contributing input for a maize producer, contributed a calculated 30% during the 2010/2011 season and increased to 33,6% to the total variable input cost six 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 10,3%. This is due to the change in producers' production practices. 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 9,7% of the total variable input cost in 2016/2017. This illustrates the type of long-term information that is gathered by means of this project.

Budgeted income and production cost figures for maize (2018/2019 production season)

An illustration of the maize budgets and their performance against other crops is shown in **Table 2** and **Table 3**. The yield scenarios were based on assumptions for production conditions in the western regions (Table 2) and the eastern regions (Table 3 on page 107). These tables are compiled to give 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.

Bydrae van verskillende veranderlike-insetkoste-items tot die totale veranderlike insetkoste van mielies

Die belangrikste fokus van hierdie afdeling is op die veranderlike koste wat by die produksie van mielies betrokke is – en veral op die uitdrukking van die verskillende veranderlike-insetkoste-items as 'n persentasie van die totale veranderlike insetkoste. **Grafiek 5a en 5b** 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 in die ses seisoene later tot 33,6% van die totale veranderlike insetkoste toegeneem.

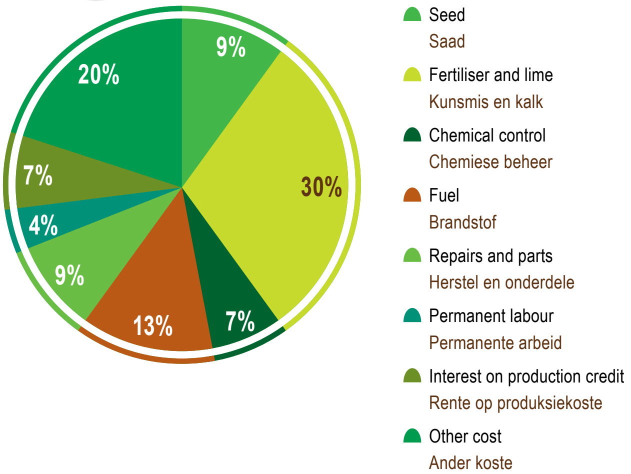
Brandstof het in die 2010/2011-seisoen 13% tot die veranderlike insetkoste bygedra. Die daling in brandstofgebruik is duidelik, aangesien die jongste inligting 'n bydrae van 10,3% aandui. Dit is die gevolg van die verandering in produsente se produksiepraktyke. Herstelwerk en onderdele het 9,0% bygedra 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 9,7% in 2016/2017 gestyg het. Dit illustreer die tipe langtermyninligting wat met behulp van hierdie projek ingesamel word.

Begrote inkomste- en produksiekostesyfers vir mielies (2018/2019-produksieseisoen)

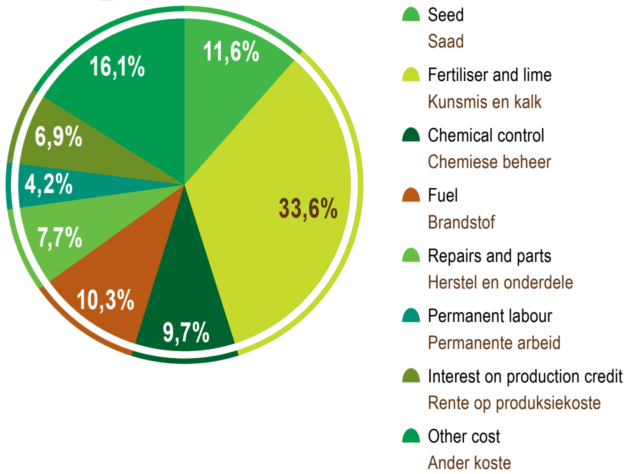
Die mieliebegrotings en hulle prestasie teen dié van ander gewasse word in **Tabel 2** en **Tabel 3** getoon. Die opbrengsscenario's is gegrond op aannames vir produksietoestande in die westelike streke (Tabel 2) en die oostelike streke (Tabel 3 op bladsy 107). Hierdie tabelle word saamgestel om 'n aanduiding 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.

5 **a and b: Contribution of different variable input cost items to the total variable input cost of maize for the North Western Free State**
a en b: Bydrae van verskillende veranderlike insetkoste-items tot die totale veranderlike insetkoste van mielies in die Noordwes-Vrystaat

a **2010/2011 PRODUCTION SEASON**
2010/2011-PRODUKSIESEISOEN



b **2016/2017 PRODUCTION SEASON**
2016/2017-PRODUKSIESEISOEN



Western regions of the country

While Table 2 shows estimated production costs for the North West Province and North West Central Free State, **Graph 6** (on page 106) illustrates the gross and net margin situation. According to the calculations, maize in the North West Central Free State on higher yield potential soils has the best gross margin for the coming production season, followed by soybeans. When solely focusing on maize, it is clear that profitable maize production is under strain – specifically when maize is planted on below average and average yield potential soil. The main emphasis is that maize, given these costs (variable and fixed cost), cannot be produced profitably on marginal yield potential soils. Maize profitability is definitely another matter when maize is planted in top production areas and higher potential soils.

Westelike streke van die land

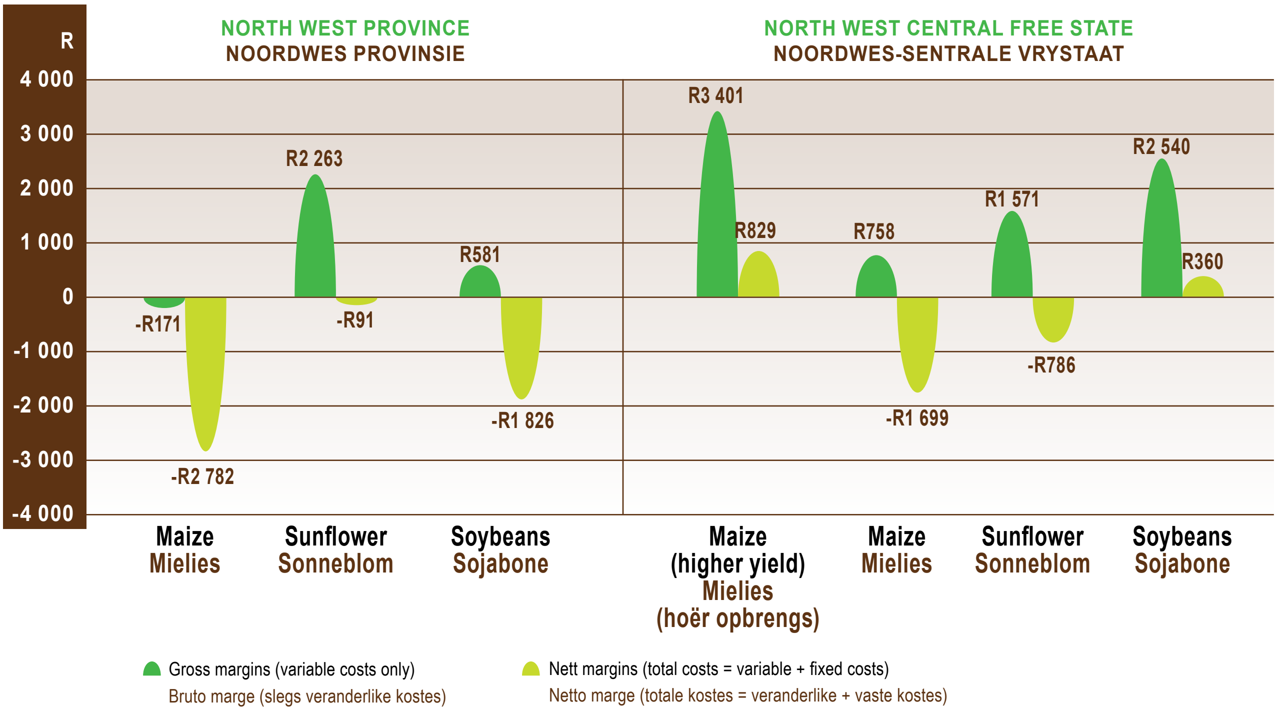
Terwyl Tabel 2 geraamde produksiekoste vir die Noordwes Provinsie en Noordwes-Sentrale Vrystaat toon, illustreer **Grafiek 6** (op bladsy 106) die bruto en netto margesituasie. Volgens die berekeninge het mielies in die Noordwes-Sentrale Vrystaat op hoër opbrengspotensiaalgronde die beste bruto marge vir die komende produksieseisoen, gevolg deur sojabone. Wanneer die fokus uitsluitlik op mielies val, is dit duidelik dat winsgewende mielieproduksie onder druk verkeer – veral wanneer mielies op laer-as-gemiddelde en gemiddelde opbrengspotensiaalgronde geplant word. Die hoofklem is dat mielies, gegewe hierdie koste (veranderlike en vaste koste), nie winsgewend op marginale opbrengspotensiaalgronde geproduseer kan word nie. Die winsgewendheid van mielies is beslis 'n ander kwessie wanneer mielies in topproduksiegebiede en op hoër potensiaalgronde geplant word.

2 Comparison of production cost budgets for summer grain for the 2018/2019 season – western regions of the country
Vergelyking van produksiekostebegrotings vir somergraan vir die 2018/2019-seisoen – westelike streke van die land

	North West Province / Noordwes Provinsie			North West Central Free State / Noordwes-Sentrale 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)	4,00	1,50	1,25	6,50	4,50	1,50	1,75
Safex price (best grade)/Safex-prys (beste graad) (R/ton)*	R2 300	R4 750	R4 850	R2 300	R2 300	R4 750	R4 850
Deductions/Aftrekkings (R/ton)	R260	R295	R63	R280	R280	R323	R63
Producer price/Produsenteprys (R/ton)	R2 040	R4 455	R4 787	R2 020	R2 020	R4 427	R4 787
Gross income/Bruto inkomste (R/ha)	**R8 160**	**R6 683**	**R5 984**	**R13 130**	**R9 090**	**R6 641**	**R8 377**
2. Variable costs/Veranderlike kostes							
Seed/Saad	R932	R437	R616	R1 264	R1 087	R499	R513
Fertiliser/Kunsmis	R2 018	R946	R979	R3 296	R2 328	R1 138	R949
Lime/Kalk	R167	R167	R167	R140	R140	R140	R140
Fuel/Brandstof	R1 207	R1 007	R935	R1 223	R1 261	R1 155	R1 167
Repairs/Reparasie	R923	R730	R626	R792	R778	R577	R647
Herbicides/Onkruiddoders	R858	R161	R519	R667	R843	R392	R253
Pesticides/Plaagdoder	R385	R24	R184	R174	R96	R17	R457
Input insurance/Insetversekering	R367	R130	R117	R256	R177	R29	R163
Grain price hedging/Graanprysverskansing	R716	R220	R283	R829	R710	R256	R284
Crop insurance/Oesversekering	R145	R187	R497	R367	R267	R299	R754
Casual labour/Losarbeid	R192	R192	R192	R192	R192	R192	R192
Production credit interest/Produksiekrediet-rente	R421	R218	R288	R529	R453	R276	R317
Total variable costs/Totale veranderlike koste (R/ha)	**R8 331**	**R4 419**	**R5 402**	**R9 729**	**R8 332**	**R5 070**	**R5 837**
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)	**R10 942**	**R6 774**	**R7 810**	**R12 301**	**R10 789**	**R7 426**	**R8 017**
3. Gross margin/Bruto marge (R/ha)	**-R171**	**R2 263**	**R581**	**R3 401**	**R758**	**R1 571**	**R2 540**
4. Net margin/Netto marge (R/ha)	**-R2 782**	**-R91**	**-R1 826**	**R829**	**-R1 699**	**-R786**	**R360**
Breakeven (variable costs only)/ Gelykbreek (slegs veranderlike koste)							
Yield/Opbrengs (t/ha)	4,08	0,99	1,13	4,82	4,12	1,15	1,22
Safex price/Safex-prys (R/ha)	2 343	3 241	4 385	1 777	2 132	3 703	3 399
Breakeven (variable + fixed cost)/ Gelykbreek (veranderlike + vaste koste)							
Yield/Opbrengs (t/ha)	5,36	1,52	1,63	6,09	5,34	1,68	1,67
Safex price/Safex-prys (R/ha)	2 995	4 811	6 311	2 172	2 678	5 274	4 644

**Prices are based on an average Safex price, which is calculated from prices during middle December 2018.*
**Pryse is gebaseer op 'n gemiddelde Safex-prys, wat bereken is van pryse in middel Desember 2018.*

6 **Margin comparison for summer grain crops in the western regions of the country for the 2018/2019 season**
Margevergelyking vir somergraangewasse in die westelike streke van die land vir die 2018/2019-seisoen



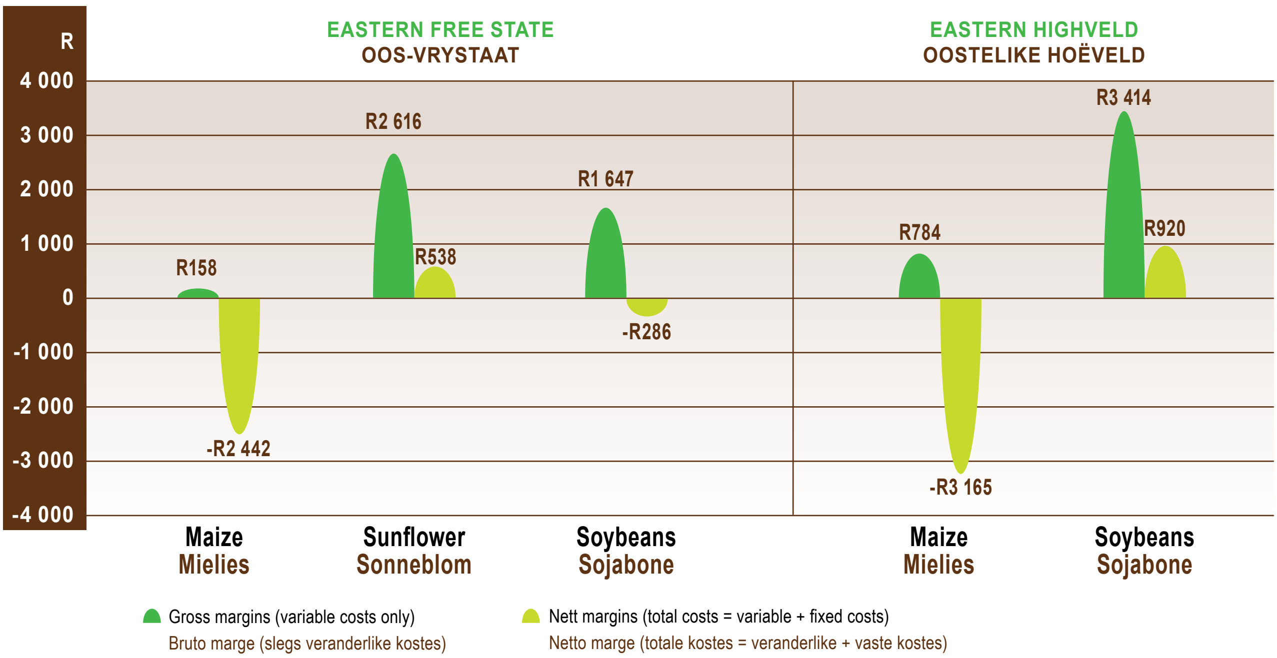
Eastern regions of the country

Table 3 shows estimated production costs for the eastern regions of the country, while **Graph 7** again illustrates the gross and net margin situation for that region. According to the calculations, profitable maize production is under pressure while soybeans' profitability appears to be more promising.

Oostelike streke van die land

Tabel 3 toon die geraamde produksiekoste vir die oostelike streke van die land, terwyl **Grafiek 7** weer eens die bruto en netto margesituasie vir daardie streek illustreer. Volgens die berekeninge verkeer winsgewende mielieproduksie onder druk, terwyl sojabone se winsgewendheid belowender lyk.

7 **Margin comparison for summer grain crops in the eastern region of the country for the 2018/2019 season**
Margevergelyking vir somergraangewasse in die oostelike streke van die land vir die 2018/2019-seisoen



Disclaimer: The information in these two graphs has been obtained from various sources, the accuracy and/or completeness of which Grain SA does not guarantee and for which Grain SA accepts no liability. Any prices or levels contained herein are preliminary and indicative only and do not represent bids or offers. These indications are provided solely for your information and consideration.

Vrywaring: Die inligting in hierdie twee grafieke is uit verskeie bronne verkry. Graan SA waarborg nie die akkuraatheid en/of volledigheid daarvan nie en Graan SA aanvaar geen aanspreeklikheid daarvoor nie. Enige pryse of vlakke wat hierin vervat word, is slegs voorlopig en indikatief, en verteenwoordig nie botte of aanbiedings nie. Hierdie aanduidings word uitsluitlik vir u inligting en oorweging verskaf.

3 Comparison of production cost budgets for summer grain for the 2018/2019 season – eastern regions of the country
Vergelyking van produksiekostebegrotings vir somergraan vir die 2018/2019-seisoen – oostelike streke van die land

	Eastern Free State Oos-Vrystaat			Eastern Highveld 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 300	R4 750	R4 850	R2 300	R4 850
Deductions/Aftrekkings (R/ton)	R313	R363	R63	R289	R59
Producer price/Produsenteprys (R/ton)	R1 987	R4 387	R4 787	R2 011	R4 791
Gross income/Bruto inkomste (R/ha)	**R9 935**	**R8 774**	**R8 617**	**R12 066**	**R10 540**
2. Variable costs/Veranderlike kostes					
Seed/Saad	R1 709	R499	R857	R2 231	R1 027
Fertiliser/Kunsmis	R2 073	R1 974	R1 187	R3 043	R2 051
Lime/Kalk	R530	R-	R-	R200	R-
Fuel/Brandstof	R1 072	R1 025	R767	R1 075	R918
Repairs/Reparasie	R901	R874	R630	R673	R500
Herbicides/Onkruiddoders	R697	R534	R893	R996	R901
Pesticides/Plaagdoder	R511	R24	R646	R603	R252
Input insurance/Insetversekering	R194	R200	R280	R235	R187
Grain price hedging/Graanprysverskansing	R817	R307	R337	R965	R347
Crop insurance/Oesversekering	R312	R386	R869	R457	R364
Aerial spraying/Lugspuit	R-	R-	R125	R-	R-
Casual labour/Losarbeid	R192	R-	R-	R192	R192
Production credit interest/Produksiekrediet-rente	R770	R335	R379	R613	R387
Total variable costs/Totale veranderlike koste (R/ha)	**R9 777**	**R6 158**	**R6 970**	**R11 282**	**R7 126**
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 377**	**R8 236**	**R8 902**	**R15 231**	**R9 620**
3. Gross margin/Bruto marge (R/ha)	**R158**	**R2 616**	**R1 647**	**R784**	**R3 414**
4. Net margin/Netto marge (R/ha)	**-R2 442**	**R538**	**-R286**	**-R3 165**	**R920**
Breakeven (variable costs only)/ Gelykbreek (slegs veranderlike koste)					
Yield/Opbrengs (t/ha)	4,92	1,40	1,46	5,61	1,49
Safex price/Safex-prys (R/ha)	2 268	3 442	3 935	2 169	3 298
Breakeven (variable + fixed cost)/ Gelykbreek (veranderlike + vaste koste)					
Yield/Opbrengs (t/ha)	6,23	1,88	1,86	7,57	2,01
Safex price/Safex-prys (R/ha)	2 788	4 481	5 009	2 828	4 432

**Prices are based on an average Safex price, which is calculated from prices during middle December 2018.*
**Pryse is gebaseer op 'n gemiddelde Safex-prys, wat bereken is van pryse in middel Desember 2018.*

GOOD CORPORATE GOVERNANCE OF PARAMOUNT IMPORTANCE TO GRAIN SA

GOEIE KORPORATIEWE BEHEER UITERS BELANGRIK VIR GRAAN SA

To Grain SA, compliance with applicable legislation and the guidelines of the King IV report are essential. Measures are taken to ensure good governance, inclusive of the following:

- <u>Annual report and financial statements</u>

  The annual report and the financial statements of the Grain SA Group are presented annually to Congress for approval.

- <u>Audits and policy</u>

  Management processes are audited to ensure that they comply 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. A risk analysis has also been concluded during the year under review to assist with internal auditing processes.

- <u>Audit Committee meetings</u>

  Meetings by the Audit Committee, with members of the management team and the external auditors promote an environment for good management practices and corporate governance.

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:

- <u>Jaarverslag en finansiële state</u>

  Die jaarverslag en die finansiële state van die Graan SA Groep word jaarliks vir goedkeuring aan Kongres voorgelê.

- <u>Oudits en beleid</u>

  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 van beheermaatreëls om hierdie risiko's te bestuur. 'n Risiko-ontleding is ook gedurende die oorsigjaar gedoen om met interne ouditprosesse te help.

- <u>Ouditkomiteevergaderings</u>

  Vergaderings deur die Ouditkomitee met lede van die bestuurspan en die eksterne ouditeurs bevorder 'n omgewing vir goeie bestuurspraktyke en korporatiewe beheer.

FINANCIAL STATEMENTS
FINANSIËLE STATE

110 **Financial Services**
Finansiële Dienste
Excellent results at year-end
Uitstekende resultate op jaareinde

114 **Statement of responsibility of the Executive**
Verklaring van verantwoordelikheid van Hoofbestuur

116 **Composition of the Executive**
Samestelling van Hoofbestuur

117 **Executive's report**
Hoofbestuur se verslag

118 **Independent auditor's report**
Onafhanklike ouditeur se verslag

121 **Summary of financial statements and notes**
Opgesomde finansiële state en aantekeninge

- 121 STATEMENT OF FINANCIAL POSITION
  STAAT VAN FINANSIËLE POSISIE
- 122 STATEMENT OF COMPREHENSIVE INCOME
  STAAT VAN OMVATTENDE INKOMSTE
- 122 STATEMENT OF CHANGES IN EQUITY
  STAAT VAN VERANDERING IN EKWITEIT
- 123 STATEMENT OF CASHFLOWS
  STAAT VAN KONTANTVLOEIE
- 124 ACCOUNTING POLICIES
  REKENINGKUNDIGE BELEID
- 129 NOTES TO THE FINANCIAL STATEMENTS
  AANTEKENINGE TOT DIE FINANSIËLE STATE
- 138 SUPPLEMENTARY INFORMATION
  AANVULLENDE INLIGTING

1 **Christa Herbst**
MANAGER: FINANCIAL SERVICES
BESTUURDER: FINANSIËLE DIENSTE

2 **Roslynne Carelse**
FINANCIAL ACCOUNTANT
FINANSIËLE REKENMEESTER

3 **Lydia Kasumba**
ASSISTANT ACCOUNTANT
ASSISTENT-REKENMEESTER

4 **Larochelle Knox**
FINANCIAL CLERK
FINANSIËLE KLERK

5 **Stien le Roux**
DEBTORS CLERK
DEBITEUREKLERK

6 **Leticia Reid**
CREDITORS CLERK
KREDITEUREKLERK

STRATEGIC FOCUS AREAS / STRATEGIESE FOKUSAREAS

- Financial function and reporting
- Investments
- Asset management
- Fund management
- Compliance

- Finansiële funksie en rapportering
- Beleggings
- Batebestuur
- Fondsbestuur
- Nakoming

HIGHLIGHTS / HOOGTEPUNTE

- Excellent results at year-end.
- Successful transition to a new financial system.

- Uitstekende resultate op jaareinde.
- Suksesvolle oorskakeling na 'n nuwe finansiële stelsel.

EXCELLENT RESULTS AT YEAR-END
UITSTEKENDE RESULTATE OP JAAREINDE

Overview

Grain SA is grateful that the 2018 financial year has delivered outstanding results, in spite of challenging economic conditions. A combination of additional income that was not budgeted for and savings – where possible – on expenses incurred contributed to the positive result. Sound relationships and ongoing support from our partners contribute to valuable projects and services in those divisions that handle our core business. Grain SA is a moderate investor, but our investments did not perform as anticipated.

The financial team was under great pressure during the period under review, with the transition from one financial system to another. However, team members each took responsibility for their duties and thus contributed to the successful transition to the new system – for which we are grateful.

Results

Grain SA ended the financial year under review with a surplus, compared to the loss for which we budgeted in the 2018 financial year. This was due to additional income that was realised, as well as savings on expenditure. Our assets ended in line with the previous year.

The Audit Report issued by PricewaterhouseCoopers (PwC) was unqualified. Grain SA is proud to present the financial statements as contained from page 112 to 140.

Our members can trust us to adhere to procedures, measures and good corporate governance to ensure sound financial management.

Oorsig

Graan SA is dankbaar dat die 2018 finansiële jaar, ten spyte van uitdagende ekonomiese toestande, uitstekende resultate gerealiseer het. 'n Kombinasie van ekstra inkomste waarvoor nie begroot is nie en besparings – waar moontlik – op uitgawes aangegaan, het bygedra tot die positiewe resultaat. Goeie verhoudings en volgehoue ondersteuning deur ons vennote dra by tot waardevolle projekte en dienste in dié afdelings wat ons kernbesigheid hanteer. Graan SA is 'n gematigde belegger, maar ons beleggings het nie presteer soos wat ons beoog het nie.

Die finansiële span het, met die oorskakeling van een finansiële stelsel na 'n nuwe finansiële stelsel, onder geweldige druk verkeer tydens die tydperk onder oorsig. Spanlede het egter elkeen verantwoordelikheid geneem vir hul take en sodoende bygedra tot die suksesvolle oorskakeling na die nuwe stelsel – waarvoor ons nederig dankbaar is.

Resultate

Graan SA eindig die finansiële jaar onder oorsig met 'n surplus – gemeet teen die verlies waarvoor ons vir die 2018-finansiële jaar begroot het. Dit kan toegeskryf word aan addisionele inkomste wat gerealiseer het, sowel as besparings op uitgawes. Ons bates het in lyn met die vorige jaar geëindig.

Die Ouditverslag, uitgereik deur PricewaterhouseCoopers (PwC), is ongekwalifiseerd. Graan SA hou graag die finansiële state soos vervat in bladsye 112 tot 140 voor.

Ons lede kan gerus wees dat prosedures en maatreëls nagekom word om sodoende ons finansies met goeie korporatiewe bestuur kerngesond te hou.

CORPORATE INFORMATION
KORPORATIEWE INLIGTING

Business address / Besigheidsadres

Block C/Blok C
Alenti Office Park
457 Witherite Avenue/Witheritelaan
The Willows
Pretoria
0041

Postal address / Posadres

PO Box 74087/Posbus 74087
Lynnwood Ridge/Lynnwoodrif
Pretoria
0040

Auditors / Ouditeure

PricewaterhouseCoopers Incorporated/Geïnkorporeer

Bankers / Bankiers

Absa Bank Limited/Beperk

Compiler / Opsteller

These financial statements are independently compiled under supervision of:
Hierdie finansiële state is onafhanklik voorberei onder toesig van:
E van Niekerk, GR (SA)

Published / Gepubliseer

5 February/Februarie 2019

STATEMENT OF RESPONSIBILITY OF THE EXECUTIVE

VERKLARING VAN VERANTWOORDELIKHEID VAN HOOFBESTUUR

FOR THE YEAR ENDED 30 SEPTEMBER 2018

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 entity as at the end of the financial year and the results of its operations and cashflows 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 acknowledges that they are ultimately responsible for the system of internal financial control established by the entity 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 entity and all employees are required to maintain the highest ethical standards in ensuring the entity's business is conducted in a manner that in all reasonable circumstances is above reproach. The focus of risk management in the entity is on identifying, assessing, managing and monitoring all known forms of risk across the entity. While operating risk cannot be fully eliminated, the entity endeavours to minimise it by ensuring that appropriate infrastructure, controls, systems and ethical behaviour are applied and managed within predetermined procedures and constraints.

VIR DIE JAAR GEËINDIG 30 SEPTEMBER 2018

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 entiteit soos op die einde van die finansiële jaar en die resultate van sy bedrywighede en kontantvloei 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 entiteit ingestel is en plaas aansienlike klem op die handhawing van 'n streng beheer-omgewing. Die Hoofbestuur stel standaarde vir interne beheer wat daarop gemik is om die risiko van foute of verlies 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 entiteit gemonitor en alle werknemers word verplig om die hoogste etiese standaarde te handhaaf om te verseker dat die entiteit se besigheid uitgevoer word op 'n wyse wat in alle redelike omstandighede bo verdenking is. Die entiteit se fokus op risikobestuur is gerig op die identifisering, evaluering, bestuur en monitering van alle bekende risiko's in die entiteit. Hoewel die bedryfsrisiko nie heeltemal uitgeskakel kan word nie, poog die entiteit 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.

The Executive is 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 system of internal financial control can provide only reasonable, and not absolute, assurance against material misstatement or loss.

The Executive has reviewed the entity's cashflow forecast for the year to 30 September 2019 and, in the light of this review and the current financial position, they are satisfied that the entity has or 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 entity's financial statements. The financial statements have been examined by the entity's independent auditor and their report is presented on pages 118 to 120.

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 believe that all representations made to the independent auditors during their audit are valid and appropriate.

The financial statements and additional schedules set out on pages 116 to 140, which have been prepared on the going concern basis, were approved by the Executive on 5 February 2019 and were signed on its behalf by:

JJ Minnaar
CHAIRPERSON
VOORSITTER

Die Hoofbestuur is van mening, gebaseer op die inligting en verduidelikings wat deur die bestuur gegee is, dat die interne beheerstelsels 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 entiteit se kontantvloei-vooruitskatting vir die jaar tot 30 September 2019 geëvalueer en, in die lig van hierdie oorsig en die huidige finansiële posisie, is hulle oortuig dat die entiteit 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 entiteit se finansiële state. Die finansiële state is deur die entitiet se eksterne ouditeure ondersoek en hul verslag is uiteengesit op bladsye 118 tot 120.

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 oudit geldig en van toepassing is.

Die finansiële state en addisionele skedules wat uiteengesit is op bladsye 116 tot 140, en voorberei is op die lopendesaak-grondslag, is goedgekeur en onderteken namens Hoofbestuur op 5 Februarie 2019 deur:

JF de Villiers
CHIEF EXECUTIVE OFFICER
UITVOERENDE HOOFBESTUURDER

COMPOSITION OF THE EXECUTIVE
SAMESTELLING VAN HOOFBESTUUR

JJ Minnaar (Chairperson/Voorsitter)
DJM Mathews (Vice-chairperson/Visevoorsitter)
PC Swart (Vice-chairperson/Visevoorsitter)
GJ Bergh
A Botha
M Bothma
JJ Breytenbach
GL Bruwer
CJ Claassen
PH Corver
JA du Plessis
DR Fourie
MF Gildenhuys
WJ Groothof
SF Haasbroek
AF Kirsten
RP Krige
SG Krüger
RJ Küsel
WJ Marais
JM Mathebula
JDM Minnaar
RE Monaisa
I Motlhabane
RE Pholo
JG Pretorius
RB Pretorius
DJ Reichel
GL Roos
DJH Rossouw
K Schoeman
BC Schoonwinkel
JC Swanepoel
AP Theron
JJ van der Westhuizen
PH Zietsman

EXECUTIVE'S REPORT
HOOFBESTUUR SE VERSLAG

The Executive has pleasure in submitting their report on the financial statements of Grain SA for the year ended 30 September 2018.

1. Nature of business

Grain SA is incorporated in South Africa and is an association that functions to promote the interests of grain producers within South Africa.

The entity operates in South Africa.

There have been no material changes to the nature of the entity's business from the prior year.

CONTACT INFORMATION

Business address	Block C Alenti Office Park 457 Witherite Avenue The Willows Pretoria 0041
Postal address	PO Box 74087 Lynnwood Ridge Pretoria 0040

2. 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.

3. Going concern

The Executive believes that the entity 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 satisfied themselves that the entity 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 entity. 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 entity, except for the contingent liability as disclosed in note 15.

4. 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.

Dit is vir die Hoofbestuur 'n plesier om hul verslag oor die finansiële state van Graan SA vir die jaar geëindig 30 September 2018, in te dien.

1. Aard van besigheid

Graan SA is in Suid-Afrika geïnkorporeer en is 'n vereniging wat funksioneer ter bevordering van die belange van graanprodusente binne Suid-Afrika.

Die entiteit dryf handel in Suid-Afrika.

Daar was geen wesenlike veranderings in die entiteit se aard van besigheid sedert die vorige jaar nie.

KONTAKBESONDERHEDE

Besigheidsadres	Blok C Alenti Office Park Witheritelaan 457 The Willows Pretoria 0041
Posadres	Posbus 74087 Lynnwoodrif Pretoria 0040

2. 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.

3. Lopende saak

Die Hoofbestuur glo dat die entiteit 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 het hulself tevrede gestel dat die entiteit 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 veranderings wat die entiteit 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 entiteit kan affekteer nie, buiten die voorwaardelike aanpsreeklikheid soos geopenbaar in nota 15.

4. 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 aanpsreeklikheid soos geopenbaar in nota 15.

pwc

Independent auditor's report

To the Members of Grain SA

Our opinion

In our opinion, the financial statements present fairly, in all material respects, the financial position of Grain SA (the Entity) as at 30 September 2018, and its financial performance and cashflows for the year then ended in accordance with the International Financial Reporting Standard for Small and Medium-sized Entities.

What we have audited

Grain SA's financial statements set out on pages 121 to 137 comprise:

- The statement of financial position as at 30 September 2018.
- The statement of comprehensive income for the year then ended.
- The statement of changes in equity for the year then ended.
- The statement of cashflows for the year then ended.
- The notes to the financial statements, which include a summary of significant accounting policies.

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 Entity in accordance with the Independent Regulatory Board for Auditors Code of Professional Conduct for Registered Auditors (IRBA Code) and other independence requirements applicable to performing audits of financial statements in South Africa. We have fulfilled our other ethical responsibilities in accordance with the IRBA Code and in accordance with other ethical requirements applicable to performing audits in South Africa. The IRBA Code is consistent with the International Ethics Standards Board for Accountants Code of Ethics for Professional Accountants (Parts A and B).

Emphasis of matter

We draw attention to Note 16 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.

Onafhanklike ouditeur se verslag

Aan die Lede van Graan SA

Ons mening

Na ons mening is die finansiële state, in alle wesenlike opsigte, 'n redelike voorstelling van die finansiële stand van Graan SA (die Entiteit) soos op 30 September 2018, en die Entiteit se finansiële prestasie en kontantvloeie vir die jaar wat op daardie datum geëindig het, ooreenkomstig die International Financial Reporting Standard for Small and Medium-sized Entities.

Wat ons geoudit het

Graan SA se finansiële state soos uiteengesit op bladsye 121 tot 137 bestaan uit:

- Die staat van finansiële posisie soos op 30 September 2018.
- Die staat van omvattende inkomste vir die jaar wat op daardie datum geëindig het.
- Die staat van veranderings in ekwiteit vir die jaar wat op daardie datum geëindig het.
- Die staat van kontantvloeie vir die jaar wat op daardie datum geëindig het.
- Die aantekeninge, wat bestaan uit 'n opsomming van beduidende rekeningkundige beleid en ander verduidelikende inligting.

Grondslag vir mening

Ons het ons oudit ooreenkomstig International Standards on Auditing ("ISAs") uitgevoer. Ons verantwoordelikhede ingevolge daardie standaarde word verder beskryf in die ouditeur se verantwoordelikhede vir die oudit van die finansiële state-afdeling van ons verslag.

Ons glo dat die ouditbewyse wat ons verkry het, toereikend en toepaslik is om 'n grondslag vir ons ouditmening te bied.

Onafhanklikheid

Ons is onafhanklik van die Entiteit in ooreenstemming met die Independent Regulatory Board for Auditors (IRBA) se Code of Professional Conduct for Registered Auditors (IRBA Code) en ander onafhanklikheidsvereistes wat van toepassing is op oudits van finansiële state in Suid-Afrika. Ons het ons ander etiese verantwoordelikhede ooreenkomstig die "IRBA Code" en ooreenkomstig ander etiese vereistes wat van toepassing is op oudits in Suid-Afrika, vervul. Die "IRBA Code" is konsekwent met die International Ethics Standards Board for Accountants Code of Ethics for Professional Accountants (Parts A and B).

Beklemtoningsparagraaf

Ons vestig aandag op Nota 16 tot die finasiele state, waar 'n voorwaardelike aanspreeklikheid ten opsigte van 'n moontlike maar onsekere inkomstebelastingverpligting geopenbaar is. Ons mening word nie aangepas vir die aangeleentheid nie.

PricewaterhouseCoopers Inc., 61 Second Avenue, Westdene, Bloemfontein 9301, P O Box 818, Bloemfontein 9300
T: +27 (51) 503 4100, F: +27 (51) 503 4299/4399, www.pwc.co.za

Chief Executive Officer: T D Shango
Management Committee: S N Madikane, J S Masondo, P J Mothibe, C Richardson, F Tonelli, C Volschenk
The Company's principal place of business is at 2 Eglin Road, Sunninghill where a list of directors' names is available for inspection.
Reg. no. 1998/012055/21, VAT reg.no. 4950174682

Other information

The Executive are responsible for the other information. The other information comprises the information included in the 'Grain SA Financial Statements for the year ended 30 September 2018'. Other information does not include the financial statements and our auditor's report thereon.

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 for the financial statements

The Executive 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 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 are responsible for assessing the Entity'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 either intends to liquidate the Entity 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.

Ander inligting

Hoofbestuur is verantwoordelik vir die ander inligting. Die ander inligting bestaan uit die inligting ingesluit in die "Graan SA Finansiële State vir die jaar geëindig 30 September 2018". Ander inligting sluit nie in die finansiële state en ons ouditeursverslag daaroor in nie.

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 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 Entiteit se Hoofbestuur is verantwoordelik vir die opstel en redelike voorstelling van die finansiële state die 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 Entiteit 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 Entiteit 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 handhaaf ons professionele skeptisisme deurlopend deur die oudit. Ons doen ook die volgende:

- Identifiseer en beoordeel die risiko's van wesenlike wanvoorstelling van die finansiële state, hetsy weens bedrog of foute, ontwerp en voer ouditprosedures uit na aanleiding van daardie risiko's, 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.

- 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 Entity's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Executive.
- Conclude on the appropriateness of the Executive's 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 Entity'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 Entity 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 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: HB Eksteen
Registered auditor
18 February 2019

- 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 Entiteit 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.
- 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 Entiteit 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 Entiteit 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 Ing.

PricewaterhouseCoopers Geïnk.
Direkteur: HB Eksteen
Geregistreerde ouditeur
18 Februarie 2019

STATEMENT OF FINANCIAL POSITION
STAAT VAN FINANSIËLE POSISIE

AT 30 SEPTEMBER 2018 | OP 30 SEPTEMBER 2018

	Notes	2018 R	2017 R	Aantekeninge	
Assets					**Bates**
Current assets		**25 928 269**	**21 344 395**		**Bedryfsbates**
Inventories	2	**129 553**	184 815	2	Voorraad
Trade and other receivables	3	**10 178 383**	8 233 958	3	Handels- en ander debiteure
Cash and cash equivalents	4	**15 620 333**	12 925 622	4	Kontant en kontantekwivalente
Non-current assets		**65 290 775**	**61 712 339**		**Nie-bedryfsbates**
Property, plant and equipment	5	**29 479 447**	27 453 515	5	Eiendom, aanleg en toerusting
Other financial assets	6	**35 811 328**	34 258 824	6	Ander finansiële bates
Trust funds	7	**-**	-	7	Trustfondse
Total assets		**91 219 044**	**83 056 734**		**Totale bates**
Equity and liabilities					**Ekwiteit en aanspreeklikhede**
Current liabilities		**28 551 473**	**28 099 503**		**Bedryfslaste**
Trade and other payables	8	**28 551 473**	28 099 503	8	Handels- en ander krediteure
Equity		**62 667 571**	**54 957 231**		**Ekwiteit**
Reserves		**8 500 000**	4 500 000		Reserwes
Retained surplus		**54 167 571**	50 457 231		Behoue surplus
Total equity and liabilities		**91 219 044**	**83 056 734**		**Totale ekwiteit en aanspreeklikhede**

The accounting policies on pages 124 to 128 and the notes on pages 129 to 137 form an integral part of the financial statements.

Die rekeningkundige beleid op bladsye 124 tot 128 en die aantekeninge op bladsye 129 tot 137 vorm 'n integrale deel van die finansiële state.

STATEMENT OF COMPREHENSIVE INCOME
STAAT VAN OMVATTENDE INKOMSTE

FOR THE YEAR ENDED 30 SEPTEMBER 2018 — VIR DIE JAAR GEËINDIG 30 SEPTEMBER 2018

	Notes	2018 R	2017 R	Aantekeninge	
Income	9	22 515 205	19 022 022	9	Inkomste
Other income	10	50 679 160	45 061 204	10	Ander inkomste
Operating expenses		(70 874 028)	(64 947 988)		Bedryfskoste
Operating surplus/(deficit)		**2 320 337**	**(864 762)**		**Bedryfsurplus/(tekort)**
Investment income	11	1 217 999	3 020 155	11	Beleggingsinkomste
Fair value adjustment	12	172 544	(1 136 844)	12	Billikewaarde-aanpassing
Finance cost	13	(540)	(41)	13	Finansieringskoste
Surplus for the year		**3 710 340**	**1 018 508**		**Surplus vir die jaar**
Other comprehensive income		-	-		Ander omvattende inkomste
Total comprehensive income for the year		**3 710 340**	**1 018 508**		**Totale omvattende inkomste vir die jaar**

The accounting policies on pages 124 to 128 and the notes on pages 129 to 137 form an integral part of the financial statements.

Die rekeningkundige beleid op bladsye 124 tot 128 en die aantekeninge op bladsye 129 tot 137 vorm 'n integrale deel van die finansiële state.

STATEMENT OF CHANGES IN EQUITY
STAAT VAN VERANDERING IN EKWITEIT

FOR THE YEAR ENDED 30 SEPTEMBER 2018 — VIR DIE JAAR GEËINDIG 30 SEPTEMBER 2018

	2018 R	2017 R	
Retained surplus			**Behoue surplus**
Balance at beginning of the year	**50 457 231**	**49 438 723**	**Saldo begin van jaar**
Surplus for the year	3 710 340	1 018 508	Surplus vir die jaar
Other comprehensive income	-	-	Ander omvattende inkomste
Total comprehensive income	**3 710 340**	**1 018 508**	**Totale omvattende inkomste**
Balance at the end of the year	**54 167 571**	**50 457 231**	**Saldo einde van die jaar**
Legal aid reserve specifically approved by Congress			**Regshulpfonds spesifiek goedgekeur deur Kongres**
Balance at beginning of the year	-	-	**Saldo begin van jaar**
Transfer	3 000 000	-	Oorplasing
Balance at the end of the year	**3 000 000**	-	**Saldo einde van jaar**
General legal aid reserve			**Algemene regshulpfonds**
Balance at beginning of the year	**4 500 000**	**4 500 000**	**Saldo begin van jaar**
Transfer	1 000 000	-	Oorplasing
Balance at the end of the year	**5 500 000**	**4 500 000**	**Saldo einde van jaar**
Total reserves	**8 500 000**	**4 500 000**	**Totale resewes**

The accounting policies on pages 124 to 128 and the notes on pages 129 to 137 form an integral part of the financial statements.

Die rekeningkundige beleid op bladsye 124 tot 128 en die aantekeninge op bladsye 129 tot 137 vorm 'n integrale deel van die finansiële state.

STATEMENT OF CASHFLOWS
STAAT VAN KONTANTVLOEIE

FOR THE YEAR ENDED 30 SEPTEMBER 2018 — VIR DIE JAAR GEËINDIG 30 SEPTEMBER 2018

	Notes	2018 R	2017 R	Aantekeninge	
Cashflow from operating activities					**Kontantvloei uit bedryfsaktiwiteite**
Cash receipts from customers and members		**20 570 780**	20 807 531		Kontantontvangste van kliënte en lede
Cash paid to suppliers and employees		**(13 357 850)**	(16 491 424)		Kontant betaal aan verskaffers en werknemers
Cash generated from operations	**14**	**7 212 930**	4 316 107	**14**	*Kontant gegenereer deur bedrywighede*
Interest received		**895 318**	1 038 938		Rente ontvang
Dividends received		**322 681**	1 981 217		Dividende ontvang
Finance cost		**(540)**	(41)		Finansieringskoste
Nett cashflow from operating activities		**8 430 389**	**7 336 221**		**Netto kontantvloei uit bedryfsaktiwiteite**
Cashflow from investment activities					**Kontantvloei uit beleggingsaktiwiteite**
Purchase of property, plant and equipment	**5**	**(4 371 723)**	(3 266 311)	**5**	Verkryging van eiendom, aanleg en toerusting
Sale of property, plant and equipment	**5**	**16 009**	288 357	**5**	Verkoop van eiendom, aanleg en toerusting
Loans to group companies		**-**	65 531		Lenings aan groepmaatskappye toegestaan
Nett movement of other financial assets		**(1 379 964)**	3 403 629		Netto beweging van finansiële bates
Nett cashflow from investment activities		**(5 735 678)**	**491 206**		**Netto kontantvloei uit beleggingsaktiwiteite**
Total cash movement for the year		**2 694 711**	**7 827 427**		**Totale kontantbeweging vir die jaar**
Balance at the beginning of the year		**12 925 622**	5 098 195		Saldo aan die begin van die jaar
Balance at the end of the year	**4**	**15 620 333**	**12 925 622**	**4**	**Saldo aan die einde van die jaar**

The accounting policies on pages 124 to 128 and the notes on pages 129 to 137 form an integral part of the financial statements.

Die rekeningkundige beleid op bladsye 124 tot 128 en die aantekeninge op bladsye 129 tot 137 vorm 'n integrale deel van die finansiële state.

ACCOUNTING POLICIES
REKENINGKUNDIGE BELEID

FOR THE YEAR ENDED 30 SEPTEMBER 2018

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 rands.

Grain SA is an entity incorporated in South Africa. Grain SA is an association 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.

This accounting policy is consistent with the previous period.

1.1 SIGNIFICANT JUDGEMENTS AND SOURCES OF ESTIMATION UNCERTAINTY

Critical judgements in applying accounting policies

There was no significant judgement in respect of the accounting policy, apart from those involving estimations, which would significantly affect the financial statements.

Key sources of estimation uncertainty

The financial statements do not include assets and liabilities whose carrying amounts are determined based on estimates for which there is a significant risk of material adjustments in the following financial year as a result of the key estimates assumptions.

1.2 INVESTMENT PROPERTY

Investment property is land and buildings held to earn rental income or for capital growth or both, rather than for use in the production or supply of goods or services or for administrative purposes, or for sell in the ordinary course of business.

Investment property is initially measured at cost and thereafter at fair value with changes in fair value recognised in profit or loss. If the fair value of investment property can not be measured reliably without undue cost or effort, 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 entity holds for its own use or for rental to others and which are expected to be used for more than one period.

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 entity, 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.

VIR DIE JAAR GEËINDIG 30 SEPTEMBER 2018

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 entiteit geïnkorporeer in Suid-Afrika. Graan SA is 'n vereniging 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 was geen beduidende oordeel van toepassing ten opsigte van die rekeningkundige beleid nie, afgesien van dié met betrekking tot ramings wat die mees beduidende uitwerking op die finansiële state sal hê.

Sleutelbronne van ramingsonsekerheid

Die finansiële state sluit nie bates en laste in waarvan die drabedrae bepaal is, gebaseer op ramings waarvoor daar 'n beduidende risiko van wesenlike aanpassings in die volgende finansiële jaar as 'n resultaat van die sleutel raming aannames bestaan nie.

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, óf vir verkoop in die gewone gang van sake.

Beleggingseiendom word aanvanklik teen kosprys gemeet en daarna teen billike waarde met veranderings in billike waarde wat in wins of verlies erken word. Indien die billike waarde van beleggingseiendom nie betroubaar gemeet kan word sonder onnodige koste of moeite nie, word dit dan teen kosprys minus opgehoopte depresiasie en opgehoopte waardedaling gemeet.

1.3 EIENDOM, AANLEG EN TOERUSTING

Eiendom, aanleg en toerusting is tasbare bates wat die entiteit 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 met die item na die entiteit sal vloei en die koste van die item betroubaar gemeet kan word. 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.

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 entity 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 entity.

The useful lives of items of property, plant and equipment have been assessed as follows:

Item	Average depreciation rate
Land and buildings	0% - 10%
Plant and machinery	20%
Furniture and fixtures	20%
Motor vehicles	20%
Office equipment	20%
Computer equipment	20%
Restaurant equipment	20%
Catering and other equipment	20%
Computer software	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.

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.

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 entiteit 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 waardedalingsverliese, behalwe vir grond wat teen kosprys minus enige opgehoopte waardedalingsverliese 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 entiteit opgeneem word, die beste reflekteer.

Die nuttige lewensduur van items van eiendom, aanleg en toerusting is soos volg geëvalueer:

Item	Gemiddelde waardever-minderingskoers
Grond en geboue	0% - 10%
Aanleg en masjinerie	20%
Meubels en toebehore	20%
Motorvoertuie	20%
Kantoortoerusting	20%
Rekenaartoerusting	20%
Restauranttoerusting	20%
Spysenierings- en ander toerusting	20%
Rekenaarsagteware	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 waardedalingsverlies onmiddellik in wins of verlies erken om die drabedrag in lyn te bring met die verhaalbare bedrag.

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.

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 cashflow, 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. Bank overdrafts are shown as a current liability on the statement of financial position.

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.

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 effektiewe rentekoersmetode. 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 effektiewe 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 effektiewe 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 geredelik 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 effektiewe rentekoersmetode te gebruik.

1.5 HURE

’n Huur word as 'n bruikhuur geklassifiseer as dit aansienlik al die risiko's en belonings verbonde aan eienaarskap aan die huurder oordra. Alle ander hure is bruikhure.

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 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.

Bedryfshure – verhuurder

Bedryfshuurinkomste word as 'n inkomste op 'n reguitlyngrondslag oor die huurtermyn erken, behalwe as:

- 'n Ander sistematiese grondslag van die tydspatroon 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 onderhandeling 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 tydspatroon 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 geweegde gemiddelde koste-grondslag.

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 IMPAIRMENT OF ASSETS

The entity 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 entity has an obligation at the reporting date as a result of a past event, it is probable that the entity 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 and other sundry income.

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 service delivery can not be calculated reliably then revenue is recognised only in respect of recognised expenses 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 entity's right to receive payment has been established.

1.8 WAARDEDALING VAN BATES

Die entiteit 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 entiteit 'n verpligting het op die verslagdoeningsdatum as gevolg van 'n gebeurtenis in die verlede; dit waarskynlik is dat die entiteit 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, huurinkomstes en ledebydrae. Ander inkomste bestaan uit borgskappe, kommersiële inkomste en ander diverse inkomstes.

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 reguitlyngrondslag oor die huurtydperk erken, selfs al word die betalings nie op 'n reguitlyngrondslag 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 effektiewerentekoersmetode.

Dividende word erken in wins of verlies wanneer die entiteit se reg om betaling te ontvang, gevestig is.

NOTES TO THE FINANCIAL STATEMENTS
AANTEKENINGE TOT DIE FINANSIËLE STATE

FOR THE YEAR ENDED 30 SEPTEMBER 2018 | VIR DIE JAAR GEËINDIG 30 SEPTEMBER 2018

	2018 R	2017 R	
2. Inventory			**2. Voorraad**
Concrete rings	**-**	51 447	Betonringe
Entertainment inventory	**114 326**	120 773	Onthaalvoorraad
Consumables	**15 227**	12 595	Verbruiksgoedere
	129 553	**184 815**	
3. Trade and other receivables			**3. Handels- en ander debiteure**
Trade receivables	**6 443 931**	4 498 367	Handelsdebiteure
Prepaid expenses	**636 950**	572 195	Vooruitbetaalde uitgawes
Deposits	**248 975**	251 732	Deposito's
VAT	**139 521**	386 202	BTW
Income receivable	**2 708 386**	2 525 167	Inkomste ontvangbaar
Employee loans	**620**	295	Personeellenings
	10 178 383	**8 233 958**	
4. Cash and cash equivalents			**4. Kontant en kontantekwivalente**
Cash and cash equivalents consist of:			Kontant en kontantekwivalente bestaan uit:
Cash on hand	**6 032**	3 875	Kontant voorhande
Bank accounts	**2 852 011**	1 088 704	Bankrekeninge
Short term investments	**12 762 290**	11 833 043	Korttermynbeleggings
	15 620 333	**12 925 622**	

5. Property, plant and equipment

5. Eiendom, aanleg en toerusting

	2018			2017		
	Cost price Kosprys	Accumulated depreciation Opgehoopte waarde-vermindering	Carrying value Drawaarde	Cost price Kosprys	Accumulated depreciation Opgehoopte waarde-vermindering	Carrying value Drawaarde
Land and buildings/Grond en geboue	48 878 287	(22 149 819)	26 728 468	45 911 182	(20 655 276)	25 255 906
Machinery and equipment/ Aanleg en masjinerie	2 791 859	(2 080 219)	711 640	2 531 980	(1 771 203)	760 777
Furniture and fittings/ Meubels en toebehore	2 235 787	(1 794 926)	440 861	1 866 866	(1 673 816)	193 050
Motor vehicles/Motorvoertuie	700 565	(692 398)	8 167	690 565	(690 565)	-
Computer equipment/Rekenaartoerusting	3 372 757	(2 393 634)	979 123	3 159 298	(2 075 948)	1 083 350
Office equipment/Kantoortoerusting	268 990	(157 032)	111 958	153 838	(140 833)	13 005
Computer software/Rekenaarsagteware	793 996	(360 870)	433 126	381 816	(332 861)	48 955
Catering and other equipment/ Spysenierings- en ander toerusting	347 338	(281 234)	66 104	347 338	(248 866)	98 472
Total/Totaal	**59 389 579**	**(29 910 132)**	**29 479 447**	**55 042 883**	**(27 589 368)**	**27 453 515**

	Opening balance Openingsaldo	Additions Byvoegings	Written off Afskrywing	Depreciation Waarde-vermindering	Closing balance Sluitingsaldo
Reconciliation of property, plant and equipment – 2018 Rekonsiliasie van eiendom, aanleg en toerusting – 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/Rekenaartoerusting	1 083 350	233 516	(3 220)	(334 523)	979 123
Office equipment/Kantoortoerusting	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 toerusting	98 472	-	-	(32 368)	66 104
Total/Totaal	**27 453 515**	**4 371 723**	**(3 220)**	**(2 342 571)**	**29 479 447**

	Opening balance Openingsaldo	Additions Byvoegings	Sales Verkope	Depreciation Waarde-vermindering	Closing balance Sluitingsaldo
Reconciliation of property, plant and equipment – 2017 Rekonsiliasie van eiendom, aanleg en toerusting – 2017					
Land and buildings/Grond en geboue	24 688 419	1 844 195	-	(1 276 708)	25 255 906
Machinery and equipment/Aanleg en masjinerie	745 799	289 214	-	(274 236)	760 777
Furniture and fittings/Meubels en toebehore	227 292	85 018	-	(119 260)	193 050
Motor vehicles/Motorvoertuie	39 154	-	-	(39 154)	-
Computer equipment/Rekenaartoerusting	846 222	887 708	(288 357)	(362 223)	1 083 350
Office equipment/Kantoortoerusting	7 646	11 657	-	(6 298)	13 005
Computer software/Rekenaarsagteware	-	49 000	-	(45)	48 955
Catering and other equipment/ Spysenierings- en ander toerusting	41 336	99 519	-	(42 383)	98 472
Total/Totaal	**26 595 868**	**3 266 311**	**(288 357)**	**(2 120 307)**	**27 453 515**

5. Property, plant and equipment

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

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.

	2018 R	2017 R	
6. Other financial assets			**6. Ander finansiële bates**
Sanlam Investment portfolio – Grain SA	**30 668 828**	30 256 552	Sanlam Beleggingsportefeulje – Graan SA
Sanlam Investment portfolio – Farmer development	**4 982 190**	3 811 503	Sanlam Beleggingsportefeulje – Ontwikkelende landbou
Senwesbel Limited – 32 062 shares @ R5 each (2017: 32 062 shares @ R5,95)	**160 310**	190 769	Senwesbel Limited – 32 062 aandele @ R5 elk (2017: 32 062 aandele @ R5,95)
	35 811 328	**34 258 824**	
7. Trust funds			**6. Trustfondse**
Commodity Levy Fund	**-**	-	**Heffingsfonds**
Trust funds	**23 115 137**	23 025 216	Trustgelde
Trust payables	**(23 115 137)**	(23 025 216)	Trustkrediteure
Recapitalisation project (RECAP)	**-**	-	**Herkapitaliseringsprojekte (RECAP)**
Trust funds	**1 556 271**	1 639 633	Trustgelde
Trust payables	**(1 556 271)**	(1 639 633)	Trustkrediteure
Jobs Fund	**-**	-	**Jobs Fund**
Trust funds	**21 116 428**	15 971 965	Trustgelde
Trust payables	**(21 116 428)**	(15 971 965)	Trustkrediteure
REID	**-**	-	**REID**
Trust funds	**1 395**	241 157	Trustgelde
Trust payables	**(1 395)**	(241 157)	Trustkrediteure
Eastern Cape Mechanisation	**-**	-	**Oos-Kaap Meganisasie**
Trust funds	**2 933 670**	3 508 075	Trustgelde
Trust payables	**(2 933 670)**	(3 508 075)	Trustkrediteure

8. Trade and other payables / 8. Handels- en ander krediteure

	2018 R	2017 R	
Trade payables	**4 793 656**	5 145 693	Handelskrediteure
Income received in advance	**17 799 542**	17 912 345	Vooruitontvange inkomste
NAMPO Geboue Proprietary Limited	**2**	2	NAMPO Geboue Eiendoms Beperk
Accrued leave	**2 427 826**	2 399 983	Opgelope verlof
Employee cost	**3 530 447**	2 641 480	Werknemerkoste
	28 551 473	**28 099 503**	

9. Income / 9. Inkomste

	2018 R	2017 R	
Management fee	**4 286 615**	5 985 263	Bestuursfooi
Rental income	**1 089 894**	1 042 128	Huurinkomste
Membership contribution	**17 138 696**	11 994 631	Ledebydrae
	22 515 205	**19 022 022**	

10. Other income / 10. Ander inkomste

	2018 R	2017 R	
Other income	**652 280**	824 261	Ander inkomste
Sponsorships	**6 998 620**	2 984 480	Borgskappe
Commercial income	**41 310 777**	37 907 673	Kommersiële inkomste
Nett levies fund income (supplementary information 2)	**-**	-	Netto heffingsfondsinkomste (aanvullende inligting 2)
Nett project income (supplementary information 3)	**1 696 910**	3 344 790	Netto projekinkomste (aanvullende inligting 3)
Exchange profit	**7 784**	-	Valuta wins
Profit on sale of assets	**12 789**	-	Wins met verkoop van bates
	50 679 160	**45 061 204**	

11. Investment income / 11. Beleggingsinkomste

	2018 R	2017 R	
Dividend income			**Dividendinkomste**
NAMPO Geboue Proprietary Limited	**-**	1 672 977	NAMPO Geboue Eiendoms Beperk
Sanlam – Grain SA	**290 248**	273 146	Sanlam – Graan SA
Sanlam – Farmer Development	**32 433**	35 094	Sanlam – Ontwikkelende landbou
	322 681	**1 981 217**	
Finance income			**Finansieringsinkomste**
Sanlam – Grain SA	**840 490**	947 751	Sanlam – Graan SA
Sanlam – Farmer Development	**54 828**	91 187	Sanlam – Ontwikkelende landbou
	895 318	**1 038 938**	
	1 217 999	**3 020 155**	

	2018 R	2017 R	
12. Fair value adjustment			**12. Billikewaarde-aanpassing**
Sanlam – Grain SA	**71 270**	(1 207 834)	Sanlam – Graan SA
Sanlam – Farmer Development	**101 274**	70 990	Sanlam – Ontwikkelende landbou
	172 544	**(1 136 844)**	
13. Finance costs			**13. Finansieringskoste**
Interest paid	**540**	41	Rente betaal
	540	**41**	
14. Cash generated through operations			**14. Kontant gegenereer deur bedrywighede**
Surplus before tax	**3 710 340**	1 018 508	**Surplus voor belasting**
Adjusted for:			Aanpassings vir:
Depreciation	**2 342 571**	2 120 306	Waardevermindering
Dividends received	**(322 681)**	(1 981 217)	Dividende ontvang
Interest received	**(895 318)**	(1 038 938)	Rente ontvang
Finance cost	**540**	41	Finansieringskoste
Fair value adjustment	**(172 544)**	1 136 844	Billikewaarde-aanpassing
Profit on exchange differences	**(7 784)**	-	Wins met valutaverskille
Profit on sale of asset	**(12 789)**	-	Wins met verkoop van bate
Non-cash items: Provision	**4 000 000**	-	Nie-kontantitems: Voorsienings
Change in operating capital			**Veranderings in bedryfskapitaal**
Inventory	**55 262**	260 663	Voorraad
Trade and other receivables	**(1 944 425)**	1 785 509	Handels- en ander debiteure
Trade and other payables	**459 758**	1 014 391	Handels- en ander krediteure
	7 212 930	**4 316 107**	

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 with effect from on 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 a possible under payment of income tax, as well as possible fines and interest rates. At year-end, no recording of the possible income tax, fines and interest rates was made in the financial statements. Clarification of the possible income tax, fines and interest will only be obtained after the application and consideration by SARS.

An application to SARS by management is in process to obtain tax exemption.

15. Voorwaardelike aanspreeklikheid

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 geimplementeer word. Artikel 10(1)(d)(iv)(bb) van die Inkomstebelatingswet 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 finansiele state gemaak nie. Uitklaring van die moontlike inkomstebelasting, boetes en rentes sal eers verkry word na die aansoek en oorweging deur die SAID.

'n Aansoek aan die SAID deur bestuur is in proses om die belastingvrystellingstatus te verkry.

	2018 R	2017 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			**Verwantepartysaldo's**
Amounts included in trade receivables (trade payables) in respect of related parties			**Bedrae ingesluit by handelsdebiteure (handels-krediteure) ten opsigte van verwante partye**
The Kommersiële Wintergraan Produsente Trust	**-**	31 554	Die Kommersiële Wintergraan Produsente Trust
The Kommersiële Mielie Produsente Navorsingstrust	**-**	631 089	Die Kommersiële Mielie Produsente Navorsingstrust
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	**15 729**	14 700	Bestuursfooi
Research projects	**70 000**	109 600	Navorsingsprojekte
Income: The Kommersiële Mielie Produsente Navorsingstrust			**Inkomstes: Die Kommersiële Mielie Produsente Navorsingstrust**
Management fee	**137 441**	120 000	Bestuursfooi
Research projects	**1 987 000**	2 823 815	Navorsingsprojekte

17. Comparative figures

The disclosure of the financial statements for 2018 has changed from function to nature. The 2017 figures have been reclassified so that it is also revealed by nature and that the two years can be compared with each other. The figures indicated under 2017 is the nett effect per line item that has been reallocated to meet this requirement.

17. Vergelykende syfers

Die 2018-finansiële state se openbaarmaking is verander van funksie na aard. Die 2017-syfers is geherklassifiseer sodat dit ook volgens aard geopenbaar word en dat die twee jare met mekaar vergelyk kan word. Die syfers aangedui onder 2017 is die netto effek per lynitem wat herallokeer is om hieraan te voldoen.

	2018 R	2017 R	
Statement of financial position			**Staat van finansiële posisie**
Trade and other receivable	**-**	(155 909)	Handels- en ander debiteure
Other financial assets	**-**	(44 386 047)	Ander finansiële bates
Loans from group companies	**-**	2	Lenings vanaf groepmaatskappye
Trade and other payables	**-**	155 901	Handels- en ander krediteure
Trust funds	**-**	48 886 046	Trustfondse
Provisions	**-**	(4 500 000)	Voorsienings
Retained earnings	**-**	7	Behoue verdienste
Profit or loss			**Wins of verlies**
Income	**-**	72 881 535	Inkomste
Other income	**-**	(42 457 439)	Ander inkomste
Operating cost	**-**	(33 057 803)	Bedryfskoste
Administrative fee – government projects	**-**	1 465 000	Administratiewe fooi – staatsprojekte
Investment income	**-**	841 405	Beleggingsinkomste
Fair value adjustment	**-**	327 307	Billikewaarde-aanpassing

18. Categories of financial instruments / 18. Kategorieë van finansiële instrumente

Categories of financial instruments – 2018 / Kategorieë van finansiële instrumente – 2018

	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 fair value through profit or loss Finansiële laste teen billike waarde deur wins of verlies	Financial liabilities at amortised cost Finansiële laste teen ge-amortiseerde koste	Equity and non-financial assets and liabilities Ekwiteit en nie-finansiële bates en laste	Total Totaal	
Assets							**Bates**
Non-current assets							**Nie-bedryfsbates**
Property, plant and equipment	-	-	-	-	29 479 447	29 479 447	Eiendom, aanleg en toerusting
Other financial assets	35 811 328	-	-	-	-	35 811 328	Ander finansiële bates
	35 811 328	**-**	**-**	**-**	**29 479 447**	**65 290 775**	
Current assets							**Bedryfsbates**
Inventory	-	-	-	-	129 553	129 553	Voorraad
Trade and other receivables	-	9 401 912	-	-	776 471	10 178 383	Handels- en ander debiteure
Cash and cash equivalents	-	15 620 333	-	-	-	15 620 333	Kontant en kontantekwivalente
	-	**25 022 245**	**-**	**-**	**906 024**	**25 928 269**	
Total assets	**35 811 328**	**25 022 245**	**-**	**-**	**30 385 471**	**91 219 044**	**Totale bates**
Equity and liabilities							**Ekwiteit en aanspreeklikhede**
Equity							**Ekwiteit**
Reserves					8 500 000	8 500 000	Reserwe
Retained surplus	-	-	-	-	54 167 571	54 167 571	Behoue surplus
Total equity	**-**	**-**	**-**	**-**	**62 667 571**	**62 667 571**	**Totale ekwiteit**
Liabilities							**Laste**
Current liabilities							**Bedryfslaste**
Trade and other payables	-	-	-	26 123 647	2 427 826	28 551 473	Handels- en ander krediteure
Total liabilities	**-**	**-**	**-**	**26 123 647**	**2 427 826**	**28 551 473**	**Totale laste**
Total equity and liabilities	**-**	**-**	**-**	**26 123 647**	**65 095 397**	**91 219 044**	**Totale ekwiteit en aanspreeklikhede**

18. Categories of financial instruments / 18. Kategorieë van finansiële instrumente

Categories of financial instruments – 2017 / Kategorieë van finansiële instrumente – 2017

	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 fair value through profit or loss Finansiële laste teen billike waarde deur wins of verlies	Financial liabilities at amortised cost Finansiële laste teen ge-amortiseerde koste	Equity and non-financial assets and liabilities Ekwiteit en nie-finansiële bates en laste	Total Totaal	
Assets							**Bates**
Non-current assets							**Nie-bedryfsbates**
Property, plant and equipment	-	-	-	-	27 453 515	27 453 515	Eiendom, aanleg en toerusting
Other financial assets	34 258 824	-	-	-	-	34 258 824	Ander finansiële bates
	34 258 824	**-**	**-**	**-**	**27 453 515**	**61 712 339**	
Current assets							**Bedryfsbates**
Inventory	-	-	-	-	184 815	184 815	Voorraad
Trade and other receivables	-	7 275 561	-	-	958 397	8 233 958	Handels- en ander debiteure
Cash and cash equivalents	-	12 925 622	-	-	-	12 925 622	Kontant en kontantekwivalente
	-	**20 201 183**	**-**	**-**	**1 143 212**	**21 344 395**	
Total assets	**34 258 824**	**20 201 183**	**-**	**-**	**28 596 727**	**83 056 734**	**Totale bates**
Equity and liabilities							**Ekwiteit en aanspreeklikhede**
Equity							**Ekwiteit**
Reserves					4 500 000	4 500 000	Reserwes
Retained surplus	-	-	-	-	50 457 231	50 457 231	Behoue surplus
Total equity	**-**	**-**	**-**	**-**	**54 957 231**	**54 957 231**	**Totale ekwiteit**
Liabilities							**Laste**
Current liabilities							**Bedryfslaste**
Trade and other payables	-	-	-	25 699 520	2 399 983	28 099 503	Handels- en ander krediteure
Total liabilities	**-**	**-**	**-**	**25 699 520**	**2 399 983**	**28 099 503**	**Totale laste**
Total equity and liabilities	**-**	**-**	**-**	**25 699 520**	**57 357 214**	**83 056 734**	**Totale ekwiteit en aanspreeklikhede**

19. Going concern

The financial statements have been prepared on the basis of accounting policies that apply to a going concern. The basis assumes that funds will be available to finance future operations and that the realisation of assets and liquidation of liabilities, contingent liabilities and liabilities in the ordinary course of matters will take place.

The entity's ability to continue as a going concern depends on a number of factors. The most important of these is that the entity continues to obtain funding.

20. Events after reporting date

Management is not aware of any events after the reporting date up to and including the date of issue except for the contingent liability as disclosed in note 15.

21. Post-employment benefits

The permanent employees belong to the pension fund which is a fixed contribution plan and is subject to the Pension Funds Act.

19. 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 entiteit se vermoë om as 'n lopende saak voort te gaan, hang af van 'n aantal faktore. Die belangrikste hiervan is dat die entiteit voortgaan om befondsing te verkry.

20. Gebeure na verslagdoeningsdatum

Die bestuur is nie bewus van enige gebeure na die verslagdoeningsdatum tot en met datum van uitreiking wat openbaarmaking vereis nie behalwe die voorwaardelike aanspreeklikheid soos geopenbaar in nota 15.

21. Nadiensvoordele

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 2018 | VIR DIE JAAR GEËINDIG 30 SEPTEMBER 2018

	2018 R	2017 R	
Income	**22 515 205**	**19 022 022**	**Inkomste**
Management fee	**4 286 615**	5 985 263	Bestuursfooi
Rental income	**1 089 894**	1 042 128	Huurinkomste
Members' contribution	**17 138 696**	11 994 631	Ledebydrae
Other income	**52 069 703**	**48 152 349**	**Ander inkomste**
Other income	**652 280**	824 261	Ander inkomste
Fair value adjustment	**172 544**	70 990	Billikewaarde-aanpassing
Sponsorships	**6 998 620**	2 984 480	Borgskappe
Dividend received	**322 681**	1 981 217	Dividende ontvang
Commercial income	**41 310 777**	37 907 673	Kommersiële inkomste
Nett levy fund income (supplementary information 2)	**-**	-	Netto heffingsfonds-inkomste (aanvullende inligting 2)
Nett project income (supplementary information 3)	**1 696 910**	3 344 790	Netto projekinkomste (aanvullende inligting 3)
Interest received	**895 318**	1 038 938	Rente ontvang
Exchange difference profit	**7 784**	-	Valuta wins
Profit on sale of assets	**12 789**	-	Wins met verkoop van bates
Expenses (refer to page 139)	**(70 874 028)**	**(64 947 988)**	**Uitgawes (verwys na bladsy 139)**
Operating surplus	**3 710 880**	**2 226 383**	**Bedryfsurplus**
Finance cost	**(540)**	(41)	Finansieringskoste
Fair value adjustment	**-**	(1 207 834)	Billikewaarde-aanpassing
Surplus for the year	**3 710 340**	**1 018 508**	**Surplus vir die jaar**
Administration (Recap)	**(1 633 000)**	(1 465 000)	Administrasie (Recap)
Operational surplus/(deficit)	**2 077 340**	**(446 492)**	**Operasionele surplus/(tekort)**

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 geoudit nie.

Expenses	2018 R	2017 R	Uitgawes
Bank costs	**109 971**	85 981	Bankkoste
Investment fee	**369 198**	384 299	Beleggingsfooi
Marketing and sponsorships	**2 782 784**	3 276 586	Bemarking en borgskappe
Fuel	**49 829**	61 113	Brandstof
Printing and stationery	**276 373**	294 365	Drukwerk en skryfbehoeftes
Electricity	**191 060**	218 376	Elektrisiteit
Levies: Office Park	**628 077**	484 567	Heffings: Kantoorpark
Repairs and maintenance	**2 869 234**	2 325 270	Herstelwerk en instandhouding
Service agreements	**257 877**	298 406	Dienste-ooreenkomste
Market information	**16 875**	86 793	Markinligting
Clothing	**122 486**	203 051	Kleredrag
Commercial expenses	**19 863 594**	16 559 359	Kommersiële uitgawes
Membership and affiliation	**1 288 953**	1 295 601	Lidmaatskap en affiliasie
Functions and entertainment	**3 917 487**	2 926 005	Funksies en onthaalkoste
Training	**356 144**	372 962	Opleiding
Auditors’ remuneration	**342 295**	338 292	Ouditeursvergoeding
Professional services	**584 397**	630 744	Professionele dienste
Travel costs and accommodation	**500 419**	366 286	Reiskoste en verblyf
Computer expenses	**2 163 492**	1 745 702	Rekenaaruitgawes
Security	**19 866**	16 352	Sekuriteit
Cleaning costs	**161 265**	149 213	Skoonmaakkostes
Bad debt	**10 630**	124 942	Slegte skuld
Telephone and fax	**714 217**	705 321	Telefoon en faks
Exchange difference loss	**14 315**	6 483	Valutaverlies
Meeting costs	**4 149 086**	3 789 989	Vergaderingskoste
Loss on sale of asset	**-**	286 373	Verlies met verkoop van bates
Insurance	**475 327**	429 423	Versekering
Refreshments	**94 034**	103 202	Verversings
Depreciation	**2 342 571**	2 120 306	Waardevermindering
Employee costs	**26 202 172**	25 262 626	Werknemerskoste
	70 874 028	**64 947 988**	

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 geoudit nie.

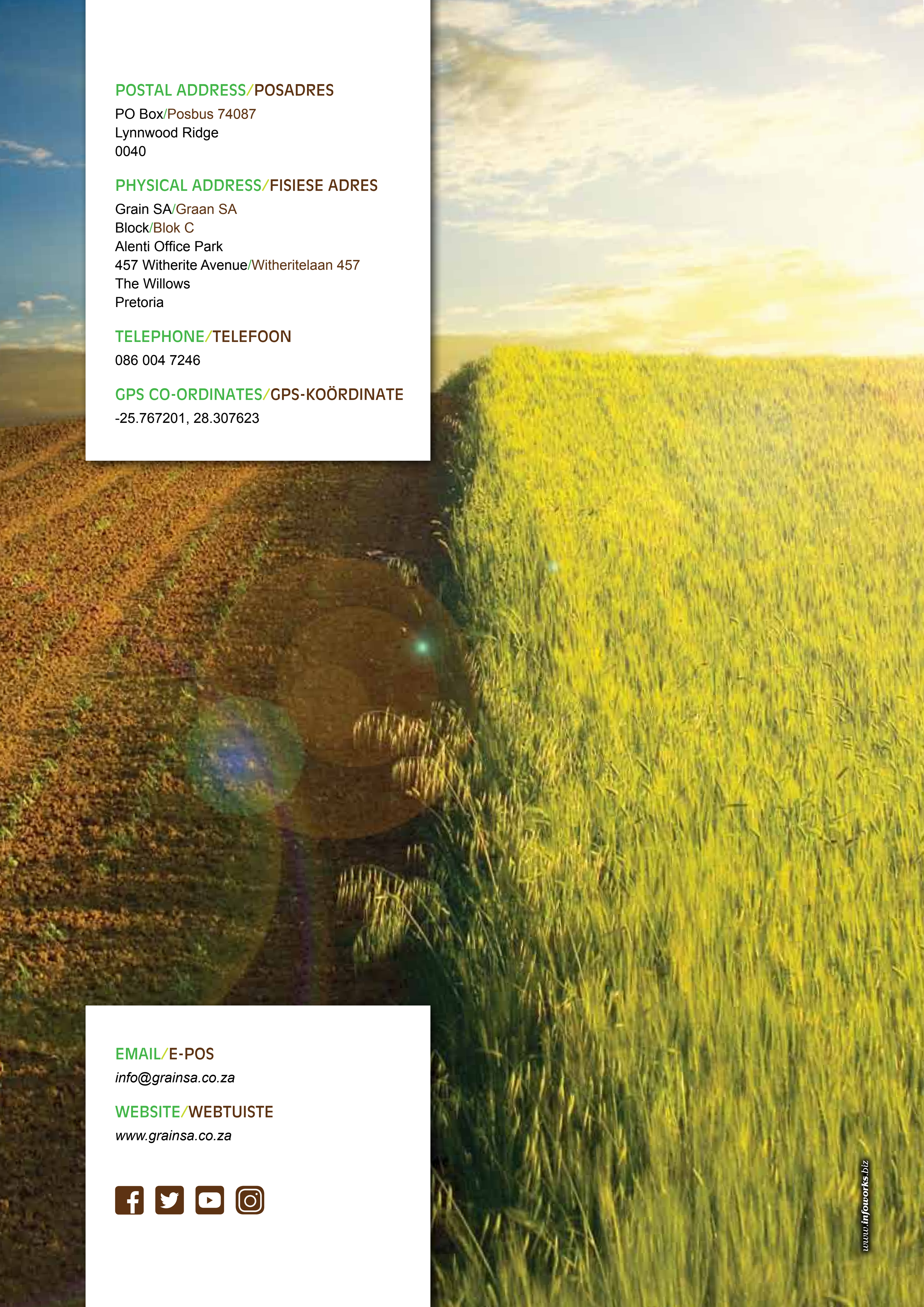
	2018 R	2017 R	
1. Commodity levy fund			**1. Heffingsfonds**
Balance at the beginning of the year	**23 025 215**	18 943 754	Saldo begin van die jaar
Received from prior year	**2 853 516**	1 346 552	Ontvang vanaf vorige jaar
(Receipts)/Payments for the year:			**Ontvangstes/(betalings) vir die jaar:**
Levies received	**18 893 678**	18 424 480	Heffings ontvang
Interest received Absa	**642 819**	489 967	Rente ontvang Absa
Returns: Sanlam	**220 730**	552 709	Opbrengs: Sanlam
Membership fees	**(2 971 000)**	(2 590 000)	Ledegeld
Membership fees less than R1 000	**(640 998)**	(537 893)	Ledegeld minder as R1 000
Industry services	**(8 087 554)**	(6 042 118)	Bedryfsbediening
Farmer development	**(525 000)**	-	Ontwikkelende landbou
Members' benefits	**(627 020)**	(456 992)	Ledevoordele
Legal aid	**(74 385)**	(41 651)	Regshulp
Provincial agricultural union affiliation	**(8 478)**	(58 556)	Provinsiale landbou-unie-affiliasie
5% branch funding	**(333 405)**	(502 879)	5% takbefondsing
Marketing	**(1 797 479)**	(1 806 193)	Bemarking
Grain SA management fee	**(1 658 672)**	(1 842 448)	Graan SA-bestuursfooi
Levy fund 2018 surplus to Grain SA	**(2 300 311)**	-	Heffingsfonds 2018 surplus na Graan SA
Amount payable to commodity levy fund at year end	**(3 496 520)**	(2 853 516)	Bedrae verskuldig aan heffingsfonds op jaareinde
Balance at the end of the year	**23 115 136**	**23 025 216**	Saldo einde van die jaar
Levy fund invested at:			**Heffingsfonds belê by:**
Absa	**11 015 717**	11 129 910	Absa
Sanlam	**12 099 419**	11 895 306	Sanlam
	23 115 136	**23 025 216**	

	2018 R	2017 R	
2. Commodity levy fund income (other income)			**2. Heffingsfonds-inkomste (ander inkomste)**
Income	**1 118 150**	1 294 027	Inkomste
Expenses	**(1 118 150)**	(1 294 027)	Uitgawes
	-	-	

	2018 R	2017 R	
3. Projects			**3. Projekte**
Income	**42 354 837**	35 571 041	Inkomste
Expenses	**(40 657 927)**	(32 226 251)	Uitgawes
	1 696 910	**3 344 790**	

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 geoudit nie.



POSTAL ADDRESS/POSADRES

PO Box/Posbus 74087
Lynnwood Ridge
0040

PHYSICAL ADDRESS/FISIESE ADRES

Grain SA/Graan SA
Block/Blok C
Alenti Office Park
457 Witherite Avenue/Witheritelaan 457
The Willows
Pretoria

TELEPHONE/TELEFOON

086 004 7246

GPS CO-ORDINATES/GPS-KOÖRDINATE

-25.767201, 28.307623

EMAIL/E-POS

info@grainsa.co.za

WEBSITE/WEBTUISTE

www.grainsa.co.za

www.infoworks.biz