GSA
GRAIN / GRAAN

ANNUAL REPORT 2025

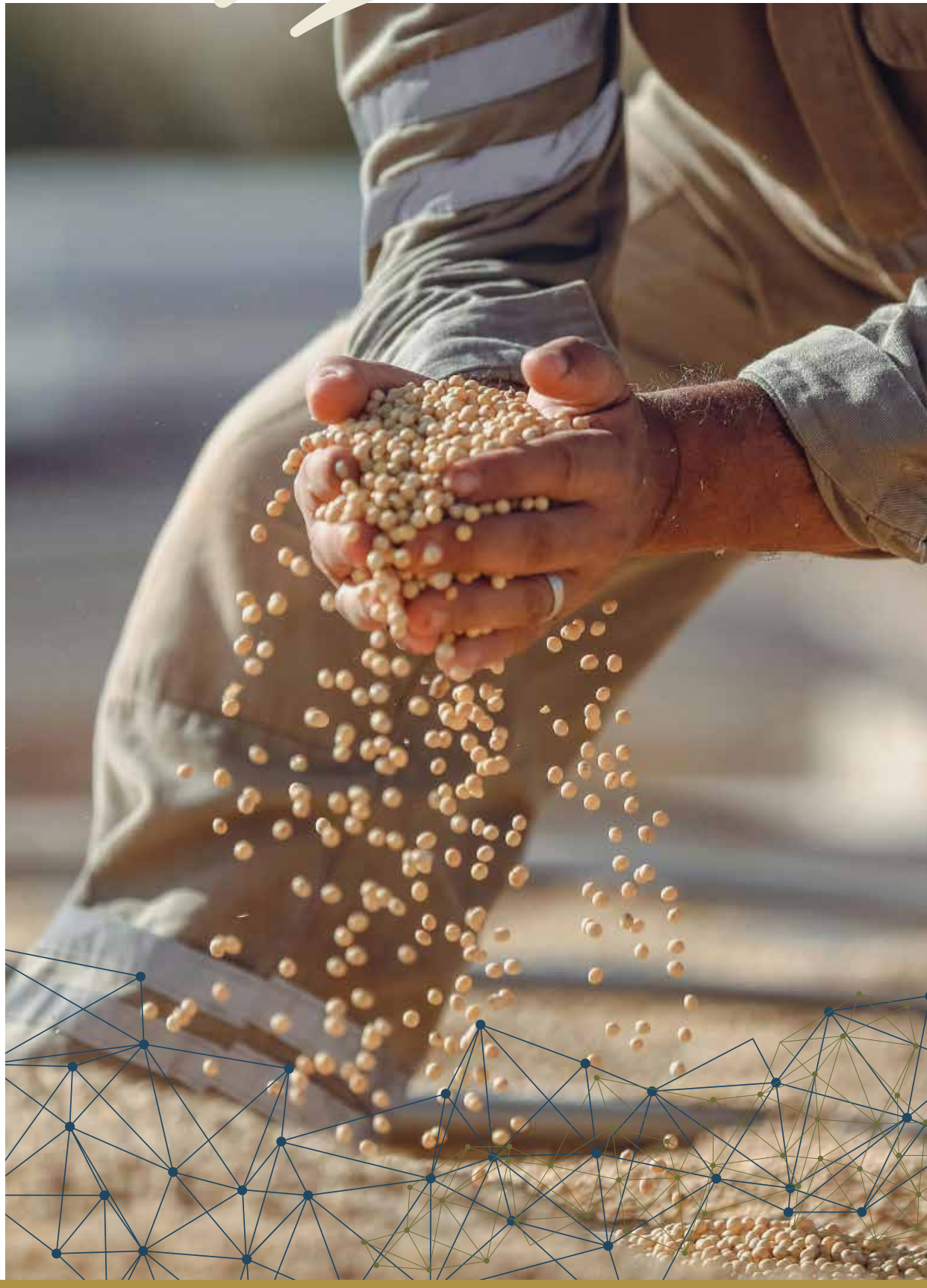














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Group overview

Grain SA is a voluntary industry organisation that provides commodity-strategic support and services to the grain and oilseeds producers of South Africa.

The corporate identity of the organisation and the motto 'We are' imply that together, the members of the organisation are stronger than a single voice. This united voice reflects the authenticity and relevance of the collective and is evidence of the dynamics of grain and oilseed production in South Africa.

Commodities that are represented include maize, wheat, soybeans, canola, sunflower, sorghum, barley and groundnuts.

Grain SA was established on 19 June 1999 with the merging of four former industry organisations, namely NAMPO (maize), NOPO (soybeans, sunflower, and groundnuts), the WPO (grain, barley and oats) and the SPO (grain sorghum).

During 2024 the organisation's structure was transformed into a group of entities composed as follows:

OUR STRUCTURE

1. **Grain SA NPO**, with the focus on promoting the interests of grain and oilseeds producers, is the holding entity of the group of entities.
2. **Phahama Grain Phakama NPC**, with the focus on training, development and the commercialisation of developing producers.
3. **Nampo (Pty) Ltd**, to manage commercial projects within the Grain SA group of entities, including events like the functions of NAMPO and the *SA Grain*-magazine.
4. The **Commercial Producers Trust**, with a focus on research to the benefit of the maize and wheat industries.

Vision

To influence the macro- and micro-economic environments in order to make sustainable and profitable local grain production and development possible.

Mission

To promote a credible and sustainable, voluntary and inclusive organisation for grain producers that gives impetus to approved strategic actions and includes meaningful partnerships and relationships with role players.

Culture and values

The creation of an empowering caring environment for passionate, dedicated and expert teams to grow and enjoy serving the organisation and influencing and delivering value for the wider food value chain. We strive to inculcate trust and build relationships through respectful interaction and open, honest and effective communication. We value continuous, sincere and honest teamwork that leads to sustained, impactful results.

FOUNDED
1999

VOLUNTARY, FARMER-LED INDUSTRY ORGANISATION

FOCUS: GRAIN AND OILSEED PRODUCERS ACROSS SA

33
REGIONS REPRESENTED

7 852
COMMERCIAL MEMBERS

5 891
DEVELOPING GRAIN PRODUCERS

18 398
FARMER DEVELOPMENT BENEFICIARIES

Core strategic objectives

1. Influencing economic sustainability.
2. Growing and supporting developing grain producers to become commercially sustainable.
3. Increasing the involvement of the younger generation of producers.
4. Growing a wider membership base.
5. Establishing and maintaining key value chain relationships.
6. Efficient and effective communication.

Leadership

WE are...

Grain SA represents the country's grain and oilseed producers through 33 geographical regions in South Africa. Each region is represented by an elected member (nominated and elected for a term of office during Congress) on the Board. Board members also utilise the regional and branch structures of the organisation to serve members.

The Board elects an Executive Committee (Exco) from its ranks. It comprises a chairperson, two vice-chairpersons and additional members. The Exco exercises all competencies of the Board between sessions of the Board and Congress. Working groups are appointed by the Board to assist the leadership in carrying out their duties. In terms of Grain SA's Constitution, directors of entities such as Nampo (Pty) Ltd and Phahama Grain Phakama NPC are appointed from the Grain SA Board as are the trustees of the Commercial Producers Trust.

With representation by Grain SA's leadership and/or personnel throughout the grain family, the cause of grain producers is effectively carried out via commodity trusts, forums, advisory committees, industry services as well as liaison with input and other umbrella organisations.

Areas of impact

Through the respective group entities – and under the leadership of a Chief Executive Officer and an expert personnel team – the following areas are focused on:

- **RESEARCH INNOVATION AND CAPACITY DEVELOPMENT**

  Climate change and adaptation, plant health, crop improvement, biosecurity, data and analytics, capacity development

- **TECHNOLOGY ADOPTION AND AGRICULTURAL DEVELOPMENT**

  New era producers, emerging commercial producers, study groups, subsistence and poverty relief, training and mentorship, NAMPO, NAMPO Tech and SA Grain-magazine

- **GRAIN INFORMATION, ECONOMICS AND MEMBER SUPPORT**

  Production, input procurement, pricing and quality, sustainability and ESG, market access, market intelligence, policy and regulatory analysis

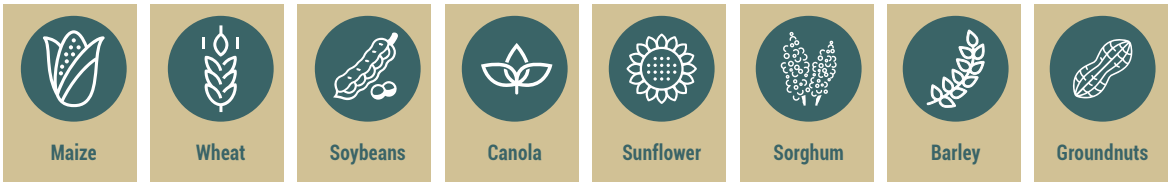
- **ENABLING SERVICES AND ORGANISATIONAL DEVELOPMENT**

  Member communications, media engagement, digital and social media strategy, thought leadership, partnership with government, civil society and value chain

- **ADVOCACY AND PARTNERSHIPS**

  Inclusive membership base, healthy working environment, financial certainty and process accuracy, governance and decision excellence

CROPS REPRESENTED



Grain SA Board



Front

MUSSA THOMAS SIBIYA
Region 29

DISSIE KRUGER
Region 25

RAMOSO PHOLO*
Representative: Farmer Development

DANIE MINNAAR*
Vice-chairperson

RICHARD KRIGE*
Chairperson

JEREMIA MATHEBULA*
Vice-chairperson

TOM VAN ROOYEN*
Region 23

WILLEM GROOTHOF*
Region 13

PIETER-ALBERT BOTHA
Region 20

SHADRACK MBELE
Region 31

Middle

EBERT DU PLESSIS
Region 12

ANDRIES GROESBEEK
Region 9

GERT PRETORIUS
Region 1

FRANCOIS GELDENHUYS
Region 4

RYK PRETORIUS
Region 10

FANIE BEKKER
Co-opted member – Region 25

DIRK LAAS
Region 6

WILLIAM RAPHOTO
Region 28

COBUS VAN ZYL*
Region 3

PIETMAN BOTHA
Region 7

Back

THOBANI NTONGA
Region 33

KOOS BLANCKENBERG
Region 26

JOSE DE KOCK
Region 27

HENDRI JANSEN VAN RENSBURG
Region 17

JACQUES VAN DER MERWE
Region 24

NEIL CLAASSEN
Region 18

EWALD KLINGENBERG
Region 14

JOSEPH SWANEPOEL
Region 8

ROSSOUW SWART
Region 32

KOOS BEZUIDENHOUT
Region 2

GERDUS BESTER
Region 21

GERRIT ROOS
Region 11

JACO BREYTENBACH
Region 19

Absent

DR TOBIAS DOYER*
Chief Executive Officer

WILL GROBLER
Region 5

TOMMIE SCHOLTZ
(Co-opted member – Region 14)

PAUL ZIETSMAN
Region 15

WESSEL HATTINGH
Region 16

WILLIE MARAIS
Region 22

* EXECUTIVE COMMITTEE

Personnel

Management Committee (ManCo)



DR TOBIAS DOYER
Chief Executive Officer



JANUS THERON
Chief Financial Officer



NICO VERMAAK
Company Secretary



CORETHA USHER
Head: Human Resources and Corporate Services



DR DIRK STRYDOM
Managing Director: Nampo (Pty) Ltd



CORNÉ LOUW
Head: Applied Economics and Member Services



SIBUSISO MABUZA
CEO: Phahama Grain Phakama NPC



MIKE ELLIS
Manager: Research Coordination and NAMPO-Tech



ALZENA GOMES
Communication and Liaison Officer

Nampo (Pty) Ltd

MARKETING



DR DIRK STRYDOM
Managing Director: Nampo (Pty) Ltd



LOMBARD VAN DYK
Marketer



WERNER VOS
Marketer



MJ SWART
Regional Manager: Marketing and Farmer Development: Western Cape



PATRICIA ZIMU
Levy Officer and Marketer



ALZENA GOMES
Communication and Liaison Officer

Nampo (Pty) Ltd (continued)

MARKETING (CONTINUED)



NOLO BAKWA
Communication and Liaison Assistant



HAILEY EHRENREICH
Committee Officer: Western Cape



CARMEN VISSER
Secretary to Managing Director: Nampo (Pty) Ltd

NAMPO HARVEST DAY



BENNIE ZAAYMAN
Manager: NAMPO Park



WIM VENTER
Administrative Officer: NAMPO Harvest Day



WILMARI ELLIS
Contract Administrator: NAMPO



JANNEKE SMIT
Function Coordinator: NAMPO Park



CATHY PAPENFUS
Administrative Clerk



DANIEL VAN EEDEN
Grounds Assistant

RESEARCH COORDINATION



MIKE ELLIS
Manager: Research Coordination and NAMPO-Tech



DR LAVINIA KISTEN
Research Coordinator



PFANO MUSETSHO
Research Coordination Intern

APPLIED ECONOMICS AND MEMBER SERVICES



CORNÉ LOUW
Head: Applied Economics and Member Services



HELEEN VILJOEN
Senior Agricultural Economist



MARGUERITE PIENAAR
Agricultural Economist



LUZELLE BOTHA
Committee Officer



GERHARD BURGER
Junior Agricultural Economist



CATHRINE MATHEKGA
Junior Agricultural Economist



GERRIT OLIVIER
Agricultural Economist Intern

Phahama Grain Phakama NPC



SIBUSISO MABUZA
CEO: Phahama Grain Phakama NPC



BANKIES MALAN
Credit and Loans Coordinator (contractor)



MLIBO QOTOYI
Junior Operational Manager



JEAN ADAMS
Secretary to CEO: PGP



MJ SWART
Regional Manager: Marketing and Farmer Development: Western Cape



HAILEY EHRENREICH
Committee Officer: Western Cape



GRAEME ENGELBRECHT
Regional Development Manager: Dundee



JERRY MTHOMBOTHI
Regional Development Manager (contractor): Mbombela

Phahama Grain Phakama NPC (continued)



DU TOIT VAN DER WESTHUIZEN
Regional Development Manager (contractor): Lichtenburg



JACQUES ROUX
Regional Development Manager (contractor): Eastern Free State



ERIC WIGGILL
Regional Development Manager (contractor): Eastern Cape



PHUMZILE NGCOBO
Assistant Regional Development Manager: Dundee



LANALIE SWANEPOEL
Office Assistant: Louwsburg



LINDIE PRETORIUS
Monitoring and Evaluation Officer



CWAYITA MPOTYI
Office Assistant: Mthatha



LUTHANDO DIKO
Office Assistant: Kokstad



NATHI MAZIBUKO
Office Assistant: Dundee



LEBO MOGATLANYANE
Office Assistant: Lichtenburg

Company Secretary (CoSec)



NICO VERMAAK
Company Secretary



ANIKA ROSSLE
Assistant Company Secretary



CLARISSA CHINIAN
Secretary to CEO and Company Secretary

Finance and IT



JANUS THERON
Chief Financial Officer



MADELIE GOOSEN
Senior Accountant



JOHAN TEESSEN
Junior Data and Business Analyst (contractor)



BERNARD LATEGAN
Accountant (contractor)



LETICIA REID
Creditors Clerk



MACHEL KRUGER
Financial Clerk



BOIPELO MOSIKARE
Financial Clerk



ELDA-BETH KEELEY
Debtors Clerk

Human Resources and Corporate Services



CORETHA USHER
Head: Human Resources and Corporate Services



LIZZY MOSEHLA
Human Resources and Corporate Services Administrator



EVA LEHABE
Receptionist



LOUISA MOHLALA
Cleaner

Grain SA personnel who resigned during the reporting period

Name	Position	Date
Rialeen Lombard	Support Officer: NAMPO Harvest Day	31 May 2025
Elray de Klerk	Communication and Liaison Assistant	31 August 2025
Liana Stroebel	Operational Manager: PGP	4 June 2025 (deceased)
Johan Kriel	Regional Development Manager (contractor): Western Free State	30 September 2025
Dr Mahlane Godfrey Kgatle	Research Coordinator	31 December 2025
Strelza van Aardt	Agricultural Economist Intern	31 December 2025
Jane McPherson	Consultant: Phahama Grain Phakama NPC	31 January 2026

Message of the Chairperson

INNOVATION AND UNITY – REFLECTING ON A YEAR OF PROGRESS

Looking back on this reporting period, I am encouraged by the remarkable tenacity of South Africa's grain industry as a whole, despite the many challenges encountered. Producers are adapting their strategies and production practices to counter quality issues, price challenges, the removal of available chemical crop solutions from the market, Sclerotinia, variable weather patterns and remaining productive.



RICHARD KRIGE

The removal of pest remedies and other solutions from the market has left producers with little or no alternatives and where alternatives are available this has further increased production costs and reduced effectiveness. Producers delivered strong outputs under these conditions, maintained production momentum and upheld their commitment to feeding the nation even under volatile climatic and economic conditions. The industry's ability to remain productive in the face of rising input costs, weather extremes and market uncertainty affirms its critical role in national food security and economic stability.

What has stood out most during this year is that grain producers have shown exceptional resilience, adaptability and innovation to survive each season after the next. Market and production conditions are not getting easier and farmers must continue to embrace improved genetics, mechanisation and precision-agriculture tools to adapt their production systems and business models to mitigate risk and maximise efficiency. Their readiness to innovate – whether through climate-smart practices, technology adoption or more strategic resource management – shows that South Africa's grain producers are not only surviving adversity but actively shaping a competitive and sustainable future.

I am however also deeply concerned about the financial strain that producers are experiencing because of high input costs and commodity prices that remain low. We are mindful that there are areas where producers face the harsh realities of meeting their financial commitments and various discussions have taken place in the second half of the reporting period with financiers regarding this situation. Grain SA is engaging with the financial sector to look at various strategies to assist farmers with their financing needs in the short and long term.

In this environment, Grain SA has continued to play a pivotal role in supporting and strengthening producers' efforts. The organisation's advocacy, research facilitation and market information services ensured that producers remained informed, empowered and equipped to navigate an increasingly complex agricultural landscape. This is in line with the organisation's core objective and strategy of ensuring productivity and sustainability.

Retained focus on input suppliers

Looking forward, I believe that Grain SA must continue to strengthen its value to members through focused engagement with input suppliers to ensure access to the latest technology. South Africa is not the biggest market in the world and we need to ensure and place pressure on these partners to bring the full spectrum of solutions to the local market ensuring we remain competitive locally and in terms of global markets. Further engagements with the supply chain and supply chain partners are essential in ensuring amongst other factors that the wheat tariff is effective, grading systems work and the survival and future of the wheat industry is ensured securing sustainability for producers. Engagements will be expanded to digital capability, data management and deeper collaboration across the value chain.

While maintaining and enjoying good relationships with government departments matters discussed and dealt with need to be converted into outcomes for producers and more agility will be encouraged by Grain SA. A forward-looking approach is essential and the Government of National Unity has shown signs of willingness by government to adapt and implement change to the benefit of grain producers, agriculture at large and this will result in agriculture giving the economy the necessary boost to ensure growth of the sector and the economy.

Growing the membership base, both commercial and emerging, remains a strategic priority as a united and representative organisation amplifies our ability to advocate effectively. Equally important is ensuring that programmes remain inclusive, future-focused and responsive to the needs of all producers. By investing in plant protection, production practices, genetics, market protection and access, digital tools, data-driven insights, training platforms and strengthened partnerships, Grain SA can further enhance its role as a trusted leader in the sector.

Collaboration, partnerships and stakeholder engagement are integral to Grain SA's mission. The strongest achievements are realised when industry, research institutions, government and private-sector partners work together. Such collaboration allows us to unlock resources, accelerate innovation adoption, break down systemic barriers and ensure that producer interests remain at the centre of national agricultural policy and value-chain development. These relationships are essential for long-term profitability, sustainability and sector growth. Membership at Agbiz and involvement with its members has supported this strategy to build solid networks and strengthen relations within the value chain to the benefit of producers and organisation.

With global markets shifting, climatic pressures intensifying and value-chain expectations evolving, technology will increasingly define which producers thrive.

Access to tools and information ensured

The Phahama Grain Phakama Farmer Development Programme, industry partnerships and technical support structures have expanded the reach of innovation and knowledge ensuring that producers across all production systems gain access to the tools and information they need to progress. Grain SA remains the essential bridge between the farmer and the broader ecosystem – ensuring that opportunities, technologies and support systems remain accessible and relevant. Rural development, transformation and a Farmer of the Year farming on communal land is evidence of these successes. Advocating for the unique realities of black farmers to ensure fair opportunities on a commercial basis remains a key area and obtaining title to the land they produce on is a priority.

Challenging government to adopt innovation and technology will remain critical drivers for survival and competitiveness for South African grain producers. With global markets shifting, climatic pressures intensifying and value-chain expectations evolving, technology will increasingly define which producers thrive. Tools such as precision agriculture, enhanced genetics, automation and digital farm management systems are no longer optional – they are strategic necessities. Grain producers collectively as a producers' organisation, as head office for grain farmers, must ensure access to technology that can be adopted in a context-appropriate and economically viable way. This is how we ensure our future success as a collective.

Stronger unity and solidarity needed

Unity within the industry remains a core objective to ensure that the message is clear and carried by all partners. Confused and divergent positions reduce the impact of our message and reduce important issues to our survival and sustainability to cheap politics. Grain SA have initiated discussions to ensure all organisations in the agricultural space are aligned regarding various issues facing producers. Through the affiliation and participation in various organisations we will continue and further advocate for stronger unity and solidarity in agriculture. We must adopt a united voice and not talk about other organisations but rather to other organisations ensuring we are aligned in our message and actions sending a clear message to our producers, value chain partners and government.

Securing and protecting property rights as the backbone of our agricultural systems and obtaining credit for production is not negotiable. Property rights are key for every sector of the economy and citizens to ensure economic activity by providing incentives for investment, and crucial for social development and stability. Grain SA will continue to defend and protect property rights through its continued affiliation with AgriSA and strive for unity amongst all groupings, commodity organisations, agricultural unions and the value chain to protect these rights.

As I look back over this reporting period, my message of encouragement to our members is simple. Remain involved at local level in organised agricultural structures, remain curious and remain united. Continue to innovate, to learn, to adapt and to engage actively with the programmes and opportunities available to you. Focus on long-term sustainability – soil health, climate readiness, cost efficiency and strategic diversification. The future of the industry belongs to those who prepare for it today. Despite the challenges we face, the opportunities for growth, innovation and renewed competitiveness are significant.

Good corporate governance in place

This is the first full period of reporting on our organisation post restructuring. As Board we are comfortable with the results and outcomes and will make the necessary adjustments and adapt where necessary. The objective remains clear to protect members' contributions under Article 30B of the Income Tax Act making these contributions tax free. The process of repayment of the reserves used during Covid has also been completed and the next target the Board has set is to increase the reserves through good financial management to the level of 80% of yearly turnover. This will ensure our organisation remains stable and sustainable into the future.

I am also happy to report that good corporate governance is in place and constantly being updated and upgraded with the establishment in the last year of a full risk register detailing every department and entity's risks and this function falls under the guidance of the Audit and Risk Committee under the guidance of its independent chairperson, Stephan Barac. Grain SA values his contribution and are thankful for his involvement in the organisation.

Word of thanks

Finally, I would like to express my sincere appreciation to our CEO, the management team and every member of the Grain SA staff. Your dedication, professionalism and unwavering commitment to serving our members and strengthening this industry are deeply valued. The progress reported this year reflects your hard work, integrity and belief in the mission of this organisation. Thank you for the countless hours you devote to ensuring that Grain SA remains a strong, influential and future-focused organisation.

Together – with determination, innovation and unity – we will continue building a grain industry that is profitable, sustainable and globally competitive. I look forward to the year ahead with confidence, purpose and optimism.



RICHARD KRIGE
Chairperson

Report of the CEO

OUR MISSION IN MOTION

Grain SA is the collective expression of grain producers' interests within the public domain but also serves a unique and specific purpose beyond representation alone. While it is not a business in the traditional sense, it functions as the corporate headquarters for grain producers, providing a space where issues of strategic importance are considered, advocating for the collective interest of grain producers and support to each other.

The organisation endeavours to exert impact across government institutions, grain value chains as well as research and business sectors. We serve the interests of grain producers through strategic collaboration and the allocation of resources to identify, access and transfer cutting-edge technology. Our mandate is clear – to ensure that farmers are supported in every aspect of their farming practices to achieve profitability and sustainability.



DR TOBIAS DOYER

Grain SA strategic responsibility to achieve these objectives is executed in a comprehensive framework that firstly prioritises the optimisation of farming profit through resource efficiency, yield improvement, cost reduction and effective plant health management. It also emphasises the promotion of productivity by leveraging advanced technologies, research-driven crop improvement, cultivar evaluation and robust crop protection measures. Market development and diversification are integral, underpinned by free-market principles, transparency, biosecurity, diagnostic services and effective pest and disease management.

Equally important is the creation of an inclusive food system, achieved by supporting emerging producers, alleviating poverty, facilitating technology transfer and fostering community development. Our impact areas include research innovation, climate adaptation, crop improvement, plant health, biosecurity and data analysis. Support is provided to all producers, from subsistence to commercial, through technology adoption, study groups, training, mentorship, NAMPO and the *SA Grain* Magazine.

Late, dry start for all regions

The positive effects of these support structures are evident in the strong yields achieved during the 2024/2025 season despite severe financial and operational pressures. Both summer grain and winter cereal producers faced a late, dry start to the season, followed by good rains in February and March. As a result, summer grain production recovered sharply, increasing by 29,3% from 15 530 495 to 20 082 585 tons. Maize rose by 26,3% (to 16 946 050 tons), sunflower by 12,1% (to 708 300 tons) and soybeans by 49% (to 2 753 125 tons).

Winter cereals had a favourable start, but dry conditions later in the Rûens and persistently low prices continued to challenge producer sustainability. Even so, 2025 winter cereal production is estimated to have increased by 4,36%, from 2 655 250 to 2 770 913 tons. Wheat rose by 5,41%, canola by 7,40% and oats increased from 43 400 to 57 213 tons.

Of particular concern is the sustainability of the wheat value chain, with focus on the role and future success of local wheat producers, including pricing mechanisms, fair international competition, alignment of production quality and quantity and the strengthening of partnerships within the value chain.

Innovation in a changing climate

South African farmers operate in a complex and often unpredictable environment. Climate volatility is a major risk, with unpredictable rainfall and heavy seasonal precipitation disrupting planting schedules. Energy interruptions affect operations dependent on irrigation and processing.

Rising fuel prices and high input costs for fertiliser, chemicals and seed further increase production costs and strain profit margins.Investment in alternative energy, such as solar and diesel, introduces additional cost pressures and security risks.

Water infrastructure remains under severe strain and a shortage of skilled labour is emerging due to the adop--tion of advanced technologies including artificial intelligence (AI), drones and sensors. The entire Grain SA team – especially the research team – is continuously scanning all potential sources of new technology and finding ways to ensure that South African farmers can access innovations from around the world.

Leverage improved research, technology and data

As sustainability is a priority for both the environment and farm profitability, grain producers strive to produce more with fewer inputs, reduce chemical use and minimise environmental impact while maintaining commercial viability. However, sustainability must be approached pragmatically. Interventions that are not aligned with the realities of farm operations can disrupt progress. Our focus is on achieving measurable outcomes by leveraging improved research, technology and data to optimise farming practices without compromising productivity. It drives economic growth, job creation, foreign exchange earnings and environmental stewardship while protecting our natural resources. Central to this approach is the promotion of sustainability through climate management, sustainable production systems and agronomic research, ensuring the long-term resilience and competitiveness of the grain industry.

Managing this environment requires resilience, forward planning, financial acumen and technological understanding. Research and technological development must be region-specific and demand coordination among multiple stakeholders. Its implementation requires infrastructure, training and digital readiness. Agriculture is undergoing a transformation through biotechnology, automation and advanced breeding methods while AI accelerates the development of new agricultural practices and enhances regulatory review. Modern breeding techniques promote drought and pest-resistant crops, contributing to climate adaptability and precision agriculture improves resource efficiency, sustainability and profitability. We are in close partnership with the South African Cultivar and Technology Agency (SACTA), the Maize Trust, the SA Winter Cereal Industry Agency (SAWCIA) and other industry and funding partners to ensure the sustainability of not only grain producers but the whole value chain.

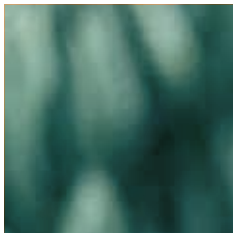
However, it sometimes feels as if the technological 'low-hanging fruit' has been picked and we will have to implement a whole range of technology to ensure the scale of impact that future technologies can add to grain producers' sustainability. What remains essential is a commitment to testing and implementing solutions that work in practice - even when the gains appear incremental. Small improvements, when combined, often translate into substantial benefits over time.

> We will have to build and expand on our experience and existing structures to face the new challenges.

As farmers become increasingly reliant on research, technology and collaboration, Grain SA's mandate to foster a community of shared learning is becoming more critical and we will have to be creative to fund solutions to the gaps left by public research institutions. The study group method that South African farmers pioneered enables producers to exchange information, evaluate innovations and make sound cost-benefit decisions and our organisation helps ensure that practical, effective technologies are implemented on farms nationwide. We will have to build and expand on our experience and existing structures to face the new challenges.

Despite the effectiveness of these innovations, the approval processes for new agricultural technologies remain slow, hindering innovation and competitiveness. Regulations must be efficient and scientifically grounded rather than driven by activism or political pressure. Grain SA is advocating for excessive regulations to be removed and processes automated wherever possible. International harmonisation and approval process synchronisation can reduce duplication and accelerate trade while self-regulation and transparency can ease pressure on farmers. A more effective regulatory environment creates opportunities for new agribusiness ventures and strengthens the long-term competitiveness of South African farmers.

While strategic frameworks and technological advancements guide the growth and sustainability of farmers, ensuring that the quality and safety of agricultural products meet consumer expectations remains a key priority for Grain SA. Product quality and food safety are fundamental to maintaining confidence in the food system, making proactive engagement with consumers and policymakers essential.







Grain SA places strong emphasis on education and awareness concerning plant protection remedies, breeding methods and biosecurity. Social media is a powerful tool for shaping such public perception and participation in this public discourse allows us to correct misconceptions and communicate the value of innovative but responsible farming practices. This approach enhances confidence in the sector while supporting the social licence to operate.

Complex political and economic landscape

Beyond operational and technological challenges, Grain SA must also guide its members through an increasingly complex political and economic landscape both locally and internationally. This environment shapes how Grain SA fulfils its mandate and directly influences the competitiveness of local grain producers.

Locally, the transition to a coalition-based Government of National Unity has introduced a new political dynamic where no single party dominates. This shift has created more noise through which farmers must make their voices heard but has also created opportunities for more meaningful dialogue and pragmatic approaches to economic growth, employment and agricultural development. Over the past year, Grain SA has made significant strides in participating in public debates, shaping opinions and ensuring that the voice of farmers is heard in both corporate and social spheres.

However, policy uncertainty and low state capacity broadly create an agriculture-unfriendly environment. Socio-economic decline affects profitability, food security and agricultural development while polarisation and the spread of misinformation on social media continue to influence policy decisions. Despite these challenges, a positive relationship with the Minister of Agriculture, John Steenhuisen and improved engagement with government provide avenues for progress.

On an international level, the ongoing tensions between major economies such as the United States, Russia and China continue to impact global trade and influence South African agriculture. The war in Ukraine has increased international grain and oilseed prices but this windfall has passed and disrupted supply chains while China's tariff policies affect access for South African grain and oilseeds. Agricultural and environmental requirements set by the European Union determine export market access while international events contribute to fluctuations in grain prices and profit margins. South African farmers must adjust export strategies and logistics to remain competitive globally.

> By leveraging our shared expertise and insights, we can build a grain industry that is adaptive, forward-looking and well-positioned to thrive in the coming financial year and beyond.

Within this challenging domestic and global context, access to both regional and international markets is critical for the profitability and sustainability of South African grain producers. Africa, particularly the Southern African Customs Union (SACU) and the Southern African Development Community (SADC) regions, receives about half of South Africa's agricultural exports. Grain and oilseeds are core products within these export baskets. Market expansion in East and West Africa faces limitations due to infrastructure constraints, corruption and trade barriers while Asia and the Middle East show growing demand driven by population growth and rising incomes. Access to these markets requires technical negotiation, tariff management and reliable logistics which remain a challenge in South Africa. A positive development is that Grain SA has achieved successes in securing market access, including recent breakthroughs in trade with China and Egypt.

Pragmatic about developing farmers

One of our greatest challenges in South Africa to ensure sustainable food production is the development of emerging farmers. This forms an integral part of the Grain SA mandate. Modern farming requires not only skill and access to resources but also a mindset that is business-oriented, disciplined and pragmatic. Historically, South Africa supported over 100 000 farmers; today fewer than 30 000 remain, highlighting the significant demands and barriers in modern agriculture. Many aspiring farmers have the desire to succeed but without proper training, resources and guidance they will not make the transition to commercial production.

Grain SA's development programme, Pahama Grain Phakama, is deliberately pragmatic. It focuses on building competent farmers rather than chasing unrealistic targets. Initiatives address financing, access to technology, motivation and skills development, ensuring that new and emerging farmers receive structured support.

New commercial farmers often face challenges such as limited access to financing, insufficient infrastructure, limited irrigation water, restricted access to suitable agricultural land, regulatory delays and difficulties in securing market contracts. Collaboration with established producers and cooperatives, combined with targeted training and technology transfer, helps these new entrants develop capacity, manage risks and achieve sustainability. By combining experience with the energy and enthusiasm of our dynamic Grain SA team, we aim to nurture a new generation of farmers capable of competing both locally and internationally.

To ensure that both emerging and established farmers can thrive sustainably, these development efforts are reinforced by strategic frameworks such as the Agriculture and Agro-processing Master Plan (AAMP), which aims to guide growth, financial viability and sector alignment. The AAMP provides a framework for supporting sustainable growth and financial viability for both commercial and entrant grain farmers. While the debate continues regarding its commercial practicality, Grain SA remains committed to effective implementation. We actively participate in Working groups, collaborate with government entities and ensure initiatives align with the needs of grain farmers.

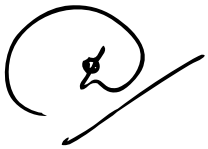
Over recent decades, collaboration and communication have improved, with government officials engaging more effectively and less constrained by ideological rigidity. Performance, effectiveness and practical governance are becoming key measures, creating opportunities for genuine progress in the sector.

Our commitment continues

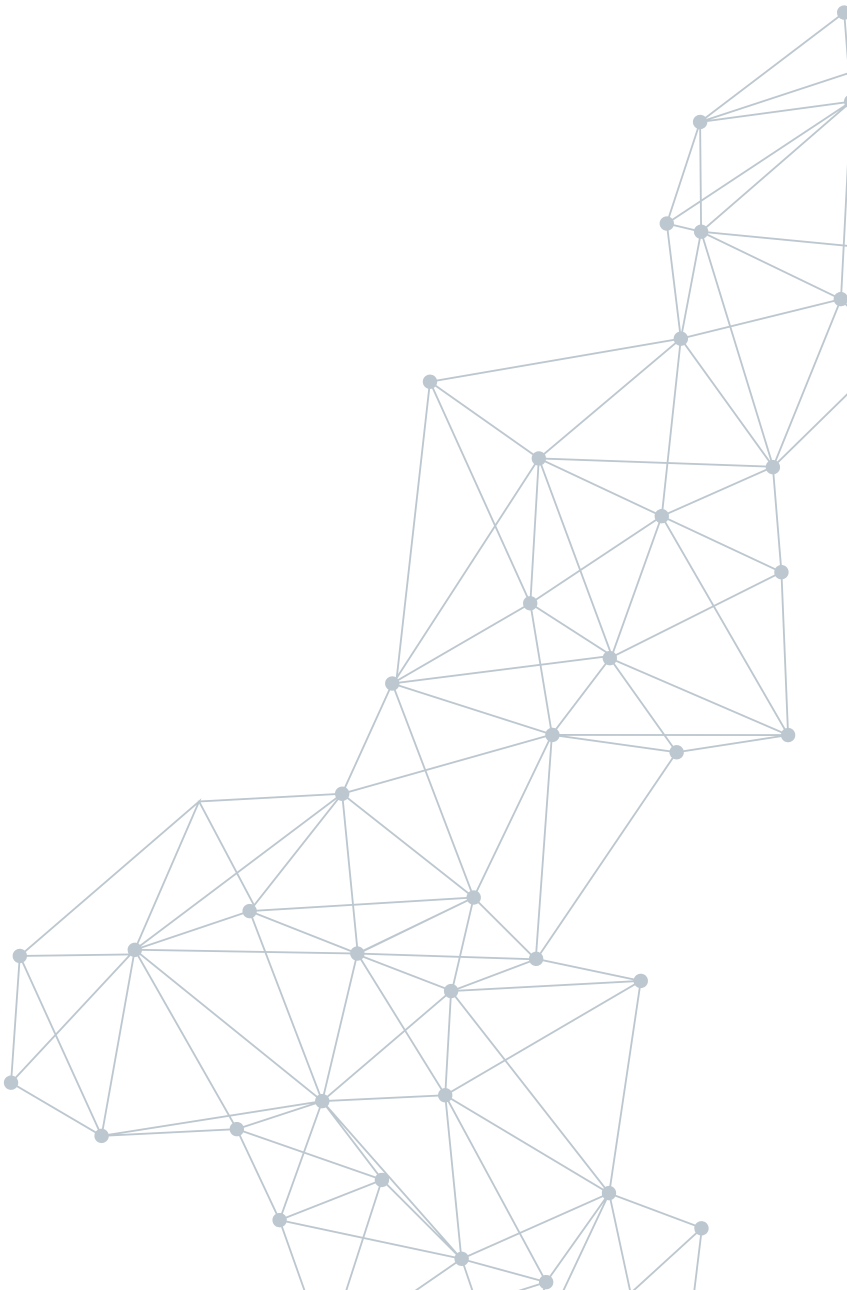
Reflecting on the past year, I am proud of Grain SA's role in guiding grain producers, fostering innovation and supporting the growth of the agricultural sector. The challenges we face – regulatory, political, technological and social – are complex. Yet our pragmatic approach ensures that producers remain well-supported and positioned for profitable and sustainable success.

I also wish to extend my sincere appreciation to the Chairperson, Richard Krige and the Board for their unwavering dedication, leadership and professionalism. I am equally encouraged by our staff, whose strong governance at senior levels and the energetic, innovative contributions of our younger team members continue to strengthen the organisation. Their expertise, diligence and commitment remain a cornerstone of Grain SA's ongoing success and enable us to navigate challenges with confidence and seize new opportunities on behalf of our members.

Looking ahead, it is essential for all members to remain engaged, embrace innovation and contribute to the collective strength of Grain SA. By leveraging our shared expertise and insights, we can build a grain industry that is adaptive, forward-looking and well-positioned to thrive in the coming financial year and beyond. Together we can navigate evolving challenges and seize emerging opportunities, ensuring sustainable growth and success for our industry.



DR TOBIAS DOYER
Chief Executive Officer



GRAIN SA MEMBER SERVICES

Grain intelligence, economics and member services

ACTIONS FOCUSED ON ENVIRONMENT CONDUCIVE FOR PRODUCTION

Strategic focus areas regarding applied economics and member services:

- Sustainable, profitable production for Grain SA members.
- Promotion of transparent market, input and production information.
- Monitoring of input industry (price, quality and availability).
- Expansion and development of markets.
- Influencing of grain policy environment.

Input environment: Ensuring reliable access to high-quality inputs at transparent and competitive prices.

Market environment: Creating and maintaining a free, fair and competitive grain market environment.

Production environment: Empowering an environment for optimum productivity in a profitable and sustainable manner.

Highlights

- Grain SA launch of 'Pest Control Operator' (PCO) course exclusively for Grain SA members.
- SAGIS publication of wheat import and export intentions
- High input costs exert pressure on margins.
- Fertiliser monitoring project – results improve over time, lime quality raises concern.
- Approval of new soybean technology and registration of quite a number of new cultivars as a result of breeding and technology levy; new application for three years was approved.
- Working groups started for implementing the Agricultural and Agro-processing Master Plan (AAMP).
- Negotiations with respect to new diesel rebate system, as well as handling of interpretations (audits) of legislation – specifically with reference to keeping logbooks.
- Diesel automatisation Working group established and project launched in collaboration with the SARS and other industry role-players.
- Final year of pilot project for the implementation of alternative calculation method of soybean location differential.
- Grading of maize published in *Government Gazette* – National Chamber of Milling taking Minister of Agriculture, Grain SA and SAGRA to court.
- Grain SA also assisted its members with disputes.
- Sustained communication regarding fundamental market information.
- Strong representation in industry forums.
- Leaf Services still kept out of industry – Minister revoked Leaf Services as assignee.
- SAWCIA statutory research levy for wheat.
- NBTs – Government still deems all NBTs to be GMOs.
- Plant Breeders' Rights Act and farmers' privilege under threat.
- Wheat import tariff.
- Cultivar release norms, relaxation and white wheat.
- Growth in soybean industry.

Grain economics and marketing

INPUT PRICES

To South African producers the combination of rising input costs, volatile exchange rates and disruptions in global value chains remained a constant challenge in 2025. The percentage change in seed prices showed that maize seed had risen by 2,3%, sorghum seed by 6,2%, soybean seed by 6,9% (the biggest increase) and sunflower seed by an average of 4,3%. At an average producer price of R4 462 per ton for the 2024/2025 production year, the gap between the maize price index and the fertiliser price index increased further, which is not surprising in view of the sharp rise in fertiliser prices. Local KAN (28) rose by 7,44% year on year, urea by 14,37%, MAP by 11,23% and KCL by 9,95%.

Virtually all the active ingredients required for the manufacturing of agrochemicals in South Africa are imported. Although the prices of certain herbicides and pesticides have dropped, the price of glyphosate (95%) has risen by almost 7% year on year. Diesel prices had also gradually declined over the past year, which brought a degree of relief to producers, although the volatility of the rand/dollar exchange rate still remained a limiting factor.

Finally, the agricultural machinery market showed strong growth in 2025, with 5 773 tractors being sold between January and September – an increase of 22% compared to the same period in 2024.

JSE MATTERS

Between October 2024 and September 2025 the JSE Commodity Advisory Committee met three times (November 2024; March 2025 and July 2025). There were no meetings of the technical committee during this period.

The Advisory Committee focused on transparency and accessibility. One of the issues that brought hope of the promotion of market transparency was the planned launch of the JSE *Basis Futures* contracts. It caused great disappointment when the JSE had to take these contracts from the table for the time being because of an internal legal opinion that requested the contracts to be expanded to accommodate more than ten silo complexes. The internal systems of the JSE first have to be adjusted to accommodate more than ten silos.

> Throughout the year initiatives were launched to monitor outloading rates and inventory available at JSE silos.

Both the *Commitment of Traders (CoT)* report and the concentration risk report are being discussed with various regulatory bodies. The committee had an official meeting with the FSCA in which it was confirmed that financial systems first had to be adjusted before the CoT report could be discussed further.

The JSE also submitted a proposal to improve speculative limits for white maize and soybeans. Grain SA commented on these and is awaiting feedback in the next committee meeting. The sizes of soybean contracts changed from 50 tons per contract to 100 tons per contract. The JSE Advisory Committee discussed issues regarding physical inventory and outloading problems in detail. Throughout the year initiatives were launched to monitor outloading rates and inventory available at JSE silos. This point is crucial and remains on the table in the remaining committee meetings.

ALTERNATIVE LOCATION DIFFERENTIAL CALCULATION METHOD FOR SOYBEANS

The JSE launching period for the alternative location differential calculation method commenced in 2024 for a two-year period ending at the end of 2025. Then the JSE must decide, under the guidance of the market and on the basis of the set criteria for success, whether this method will be implemented permanently. In 2024 the average redeliveries under the new model were higher than in the previous year, but in 2025 redeliveries dropped to below the average.

Several silos with high redeliveries also had high redeliveries in previous years, as well as high redeliveries in the maize market. This points to a silo-specific problem, rather than the alternative method. During the pilot period that market also expanded to the extent that an additional 28 silos facilitated physical delivery of soybeans. Grain SA communicated an in-depth analysis to the JSE on the operation of the alternative model in preparation for the final decision to be made at the end of 2025.

LEAF SERVICES

LEAF Services was appointed by the Department of Agriculture in terms of the Agricultural Product Standards Act to inspect grains and grain products. Their inspection involves grading unprocessed grain and grain products – something that is already being done by the industry. It would therefore imply the current self-regulating grading system is being duplicated.

By participating in the discussions and ensuring that producers are not harmed by unnecessary additional costs, Grain SA had already saved producers millions of rands in costs by 2024. Earlier this year the Minister of Agriculture cancelled the appointment of Leaf Services after numerous requests and consultations by Grain SA and other industry role-players to the department. This is a major victory from which grain producers benefit considerably.

TRADING: IMPORTS AND EXPORTS

The 2024/2025 marketing season saw a drastic decrease in soybean exports. Only 150 245 tons of exports were achieved during the season, which is in stark contrast to the 597 045 tons of the previous season. Although the figure is considerably lower than that of 2023/2024, it is still higher than the 10-year average of approximately 112 000 tons per season. The biggest importers of South African soybeans were Zimbabwe, Vietnam and Lesotho.

However, the decline in export tonnage was not limited to soybeans, as yellow maize exports also dropped by 64%. Yellow maize exports for the 2024/2025 season reached a total of 770 377 tons, compared to the 2 167 128 tons of the previous season. The yellow maize exports for the season were also below the 10-year average of 1 324 643 tons per season.

Approximately 57% of South African yellow maize was destined for Zimbabwe, 13% for Botswana and 11% for the Kingdom of Eswatini. Other importers of yellow maize include Lesotho, Mozambique and Namibia.

> A part of the Agricultural and Agro-processing Master Plan discussions and negotiations is also to make the logistics system more effective and manage it better.

However, white maize exports did not follow the same trend, as there was an 18% increase in tonnage exported. White maize exports for the 2024/2025 marketing season reached 1 478 522 tons and were considerably higher than the 10-year average of 930 000 tons. Export markets for this grain mainly include South Africa's neighbouring countries, with Zimbabwe in the lead, constituting 56% of the exports. Namibia and Botswana follow with 14% and 13% respectively.

For the 2024/2025 marketing year South Africa exported only 102 265 tons of grain through the ports, and imported 3 574 361 tons of grain. Imports were, respectively, 2 420 660 tons through Durban harbour, 908 942 tons through Cape Town harbour and 244 759 through Port Elizabeth harbour.

A part of the Agricultural and Agro-processing Master Plan discussions and negotiations is also to make the logistics system more effective and manage it better. One of the actions is to make upgrades to the port infrastructure.

SEED COMPLAINTS INVESTIGATED

During the 2024/2025 planting season Grain SA investigated various seed enquiries and complaints on behalf of our members. On specific occasions Grain SA had the seed tested itself to ensure quality.

GRADING REGULATIONS FOR MAIZE

In August 2021 the Maize Forum, after consultation since 2019 and research by the SAGL, applied to amend the maize grading regulations. The aim was to make cosmetic changes and reduce grey areas, among other things by removing discoloured and water-damaged kernels as defective and better defining frost-damaged kernels. Because the Department of Agriculture progressed very slowly with consultation, a temporary dispensation was applied for in 2022, but this was revoked soon afterwards because of differences of opinion between role-players. Despite further meetings, no consensus could be reached and the application was continued.

The department published the proposed amendments on 31 October 2022, but rejected them in January 2023 because of disagreement in the forum. Grain SA and SAGRA then submitted the same research-based application on behalf of themselves. After further consideration the Minister of Agriculture approved the amendments and published them in February and March 2024.

However, in August 2024 the National Chamber of Milling sued the Minister, Grain SA and SAGRA about the publication. The court case is still ongoing. Grain SA assures members that the case is being handled properly to secure fair grading standards for producers.

GRADING REGULATIONS FOR CANOLA

After a long consultation with industry role-players, agreement was reached to change the grading regulations for canola. Some of the changes proposed by other role-players would not have been to the benefit of producers and Grain SA was able to oppose them successfully. These regulations should come into effect in the 2026/2027 marketing season.

DIESEL REBATE AUDITS AND INTERPRETATION

In addition to negotiations and discussions on a new diesel rebate system, several of our members were assisted with regard to the handling of audits by SARS. There were various challenges regarding the interpretation of legislation in the light of electronic logbook systems and the views of SARS on logbook requirements to qualify for the rebate.

SARS also published the new diesel rebate system on 18 March 2022. However, the implementation date still has to be announced. Grain SA and AgriSA are uncomfortable with quite a number of the changes and are taking it up with SARS and the Treasury. Various meetings in this regard were held with SARS and the Treasury during the reporting period, and formal letters were submitted to the Treasury. Grain SA was also requested to assist SARS with the development of their automatic diesel logbook system.

DIESEL AUTOMATISATION WORKING GROUP

Grain SA is currently working with the South African Revenue Service (SARS), grain producers and various private technology service providers in the diesel industry on a project to automatise the diesel logbook systems. This project is aimed at replacing the current processes and improving them by developing a more effective digital system.

The Working group involved in this initiative comprises volunteers and is not a closed group – any interested parties are welcome to become involved. This collaboration is an important step in the direction of administrative relief and greater efficiency for producers who are entitled to the diesel rebate. A pilot project with several producers is planned to run between October and December 2025. The Working group aims to have a feasible and tested system by March 2026 that SARS can then implement.

PEST CONTROL OPERATOR (PCO) COURSE

In 2023, then Department of Agriculture, Land Reform and Rural Development (DALRRD) published new regulations that defined two classes of substances, namely 'restricted agriculture remedies' and 'concerning remedies'. These remedies are toxic and may be purchased, mixed and used only by registered PCOs. The classification is aimed at improving safety and responsibility in the handling of agrochemicals.

After tragic deaths in 2024 due to the illegal acquisition, storage and use of restricted agriculture remedies, the DALRRD, together with the Department of Health, commenced with intensive inspections of the agriculture remedies supply chain. This led to the strict implementation of the PCO regulations.

Grain SA joined hands with Potatoes SA (PSA) to facilitate the process for producers to become an accredited PCO. With the permission of the Registrar of Act 36 the two organisations managed to develop an accredited training programme with the assistance of a chemical expert. This programme is available exclusively to members of Grain SA and/or PSA.

The course was introduced to members on 14 August in an online event. The Registrar of Act 36 attended the session and addressed producers and was available to answer questions. Registration for the course and the full training programme to obtain a PCO certificate are 100% online. Producers can therefore complete the course in their own time and at their own pace.

Grain SA also compiled a step-by-step guide explaining how registration for the training programme works and what the Department of Agriculture (DoA) further expects from producers. This guide can be obtained by scanning the QR code or following this link: *https://shorturl.at/krDmu*.

WHEAT IMPORT TARIFF

Since October 2024 South Africa has had an active wheat import tariff. The tariffs were respectively published in the *Government Gazette* on 22 October 2024 (R422/ton); 1 April 2025 (R184/ton); 15 April 2025 (R550/ton) and 8 July 2025 (R851/ton), with an average announcement period of 85 working days.

Grain SA, together with SACOTA, submitted a formal application to ITAC at the end of 2023 to adjust the base reference price to $289/ton and to automatise the announcement method. This application was in the final phase of the ITAC investigation in October 2025 after several discussions, feedback and public consultations regarding this application occurred in 2025.

AGRICULTURAL AND AGRO-PROCESSING MASTER PLAN (AAMP)

The Agricultural and Agro-processing Master Plan (AAMP) is a strategic framework that was developed in South Africa to promote growth, transformation and sustainable development in the agricultural and processing industry. It was compiled in collaboration with the government, the private sector, trade unions and other industry role-players. The master plan focuses on key objectives like the improvement of food safety, job creation, support of emerging farmers and the promotion of agricultural expansion through innovative practices, research and technologies.

Grain SA, together with other industry role-players, forms part of Working groups established to achieve the objectives stipulated by the master plan. The Working groups in which Grain SA is represented include agricultural transformation and support for emerging farmers, development of markets and export opportunities, policy and regulatory environment, research and technology, and transport and logistics.

The AAMP plays an important role in building the agricultural sector in South Africa through a comprehensive approach aimed at promoting economic growth and addressing issues.

SORGHUM CLUSTER INITIATIVE

Over the past two decades, sorghum production in South Africa has gradually declined, partly as a result of reduced demand and partly due to limited progress in the yield potential of sorghum cultivars. Nevertheless, sorghum remains an important crop in South Africa and in the bigger picture because of the high nutritional value of the crop and its resistance to drought conditions.

A sorghum cluster initiative was established in collaboration with the Sorghum Trust and the DSI/TIA. The cluster identified the following areas as focus points:

(1) Removal of VAT on sorghum.
(2) Establishment of processing facilities.
(3) Awareness campaigns for marketing sorghum.
(4) Marketing analysis of the upgrading of the sorghum value chain.
(5) Assessment of exotic germplasm as a precursor to sorghum pre-breeding.
(6) Alternative quelea control measures.

> Grain SA's role is to ensure that the targets are implemented in such a way that producers can continue producing in a sustainable and profitable manner.

The Sorghum Trust, DSI/TIA and Grain SA, in collaboration with the greater sorghum value chain, are addressing focus points. These include an active awareness campaign, a successful first planting season for the germplasm initiative, progress with the alternative quelea control measures, product development and sorghum recipes, as well as new initiatives that have been added, like the plant pathology in collaboration with the University of the Free State. More good news is that the sorghum proposed planting for the 2024/2025 production season was increased by 28,27% to 54 000 ha.

PRODUCTION ENVIRONMENT AND POLICY

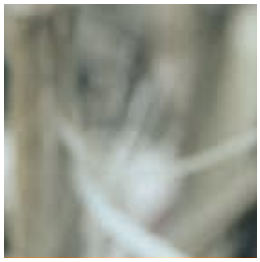
There is a gap in the market during the period when the intention to plant-report is published by the National Crop Estimates Committee in October and the provisional planted area at the end of January. For that reason Grain SA, attempting to fill the gap and release transparent information on the market, started releasing a production condition report that is circulated fortnightly to producers and the greater grain industry. Among other things, the report includes rainfall statistics, crop conditions and planting rates.

The Climate Change Act was signed by president Cyril Ramaphosa in the past year. As a result, various policy changes will be implemented. One of these policies is the Sectoral Emission targets (SETs) set out for every industry.

Grain SA, in collaboration with Agbiz and several other industry role-players and researchers, forms part of a Working group in this regard. The Working group was established to achieve the targets set out in collaboration with the Department of Agriculture. Grain SA's role is to ensure that the targets are implemented in such a way that producers can continue producing in a sustainable and profitable manner.

Environmental, Social and Governance objectives, better known as ESGs, have been relevant internationally for quite some time. Local companies in the value chain are currently experiencing pressure to also start implementing the policy. Grain SA is proactively developing an ESG score card and discussing how this can be implemented without affecting the sustainability and profitability of producers.











GRAIN SA MEMBER SERVICES

Production overview

PRODUCTION CONDITIONS IN THE 2024/2025 PRODUCTION SEASON FOR SUMMER AND WINTER GRAINS

The 2024/2025 production season was characterised by contrasting outcomes across South Africa's major summer and winter grain crops. While some crops have experienced great performance, others were adversely affected by the mid-summer drought.

Among the summer grains, maize and soybeans showed reductions in yields and production volumes due to the adverse effects of the mid-summer drought during critical growing stages. Similarly, sunflower seed continued its year-on-year decline, showing both lower yields and a smaller area planted. Sorghum production also remained below the five- and ten-year averages, despite a slight increase in the area. In contrast, groundnuts saw a slight recovery in the area planted, even though production remained relatively stable as yields declined slightly from historical averages.

Winter grains performed considerably better. Wheat achieved above-average yields and stable production levels, due to favourable weather conditions in the Western Cape. Barley maintained consistent yields and showed a slight increase in production, supported by increased area planted. The canola industry was the best-performing winter crop, achieving record-high yields and production volumes, driven by expanded area planted, favourable weather conditions and improved rotational crop systems.

Sections 1 to 8 below provide an overview of the long-term production conditions and growth trends of South Africa's summer and winter grain crops, focusing on the area planted, total production, and overall yield performance.

1. Maize

Graph 1 illustrates the long-term trends in maize area planted, production, and yield in South Africa from the 1990/1991 to 2024/2025 production seasons. Over the 34-year period, the maize industry has remained the country's most important grain crop, solidifying its important role as the backbone of both the human consumption and animal feed markets.

The total area planted of maize (gold bar) has decreased slightly since the mid-1990s, from almost 4 million hectares to fluctuate between 2,5 and 3 million hectares in the early 2000s, reflecting changes in price competitiveness, weather variability, and crop rotation practices. From 2010 onwards, the area planted stabilised at around 2,6 million hectares.

Production represented by the dark-grey bar has followed a broadly upward trend, with notable peaks during seasons of favourable rainfall and higher yields. The most significant increases were observed from 2016/2017 onwards. Despite a decrease in production during the 2018/2019 and the 2023/2024 production seasons caused by dry weather conditions, production is projected to recover greatly in 2024/2025 to over 16,3 million tons, exceeding both the five-and ten-year averages of 10,57 million and 11,41 million tons, respectively.

The red line graph represents yields over time. On average, yields have increased substantially, reaching 4,87 t/ha in 2023/2024 and projected to increase to 6,29 t/ha in 2024/2025. These figures outperform the five-year average of 4,2 t/ha and the ten-year average of 4,7 t/ha. **Table 1** provides a summary of the production overview of total maize in the 2024/2025 season.

Graph 1: Maize area planted, production, and yield.

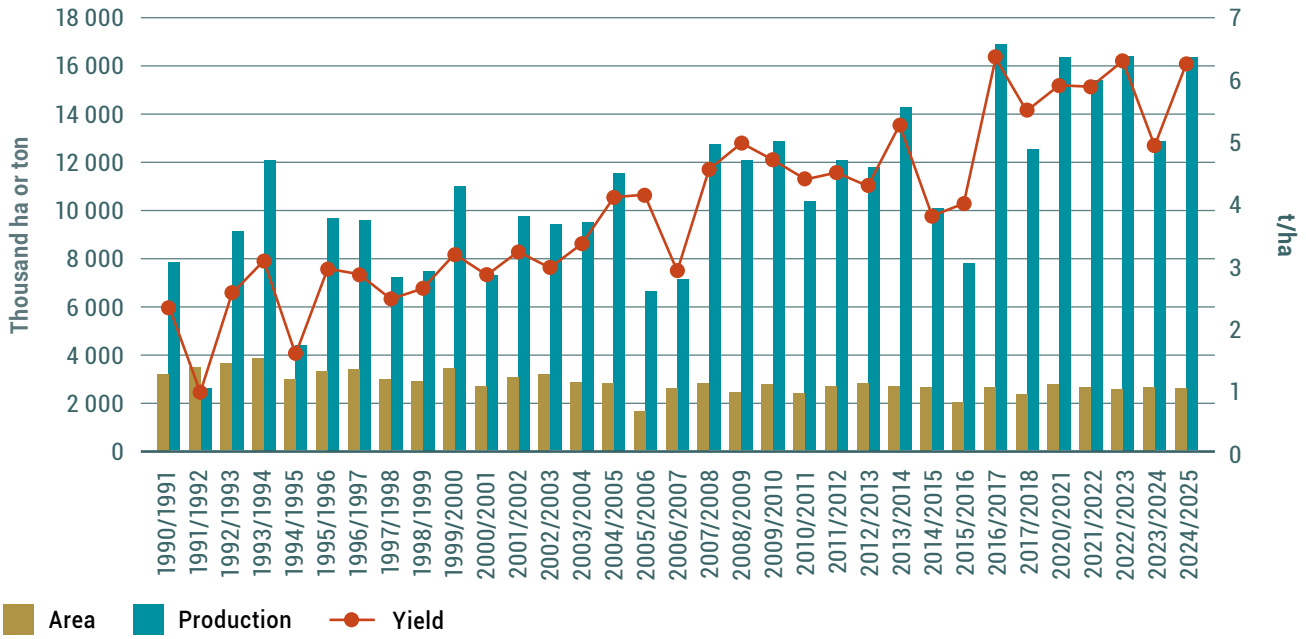


Table 1: Production overview for maize (2024/2025).

	2023/2024	2024/2025	5-yr average	10-yr average
Total planted (ha)	2 636 250	2 596 700	2 232 713	2 282 092
White	1 554 750	1 599 700	1 575 863	1 495 965
Yellow	1 081 500	997 000	656 850	786 127
Total production (tons)	12 850 000	16 435 650	10 573 847	11 405 713
Average yield (t/ha)	7,4	6,3	4,2	4,7

2. Soybeans

Graph 2 (on page 26) illustrates the long-term trends in soybean area planted, production, and yield in South Africa from 1992 to 2024. Soybeans are the largest oilseed crop and have undergone remarkable expansion. In the early 1990s, the average yield during the first five years was approximately 1,22 t/ha, whereas in the most recent five years, it has increased to 2,08 t/ha, after an improvement of nearly 1 t/ha.

Soybean production (represented by the turquoise graph) exceeded one million tons for the first time in the 2014/2015 season. Within less than a decade, production has more than doubled, reaching 2,7 million tons during the 2022/2023 season. Although the severe drought during the 2023/2024 season caused significant reductions in both production and yield, the industry remains resilient.

Production is expected to recover in the 2024/2025 season, supported by an increased area planted of approximately 1,2 million hectares. The area planted for the season is 448 685 tons, less than the 5-year average and 98 236 more than the ten-year average. Major soybean producers are the Free State, Mpumalanga, followed by North West.

Graph 2: Soybean area planted, production, and yield.

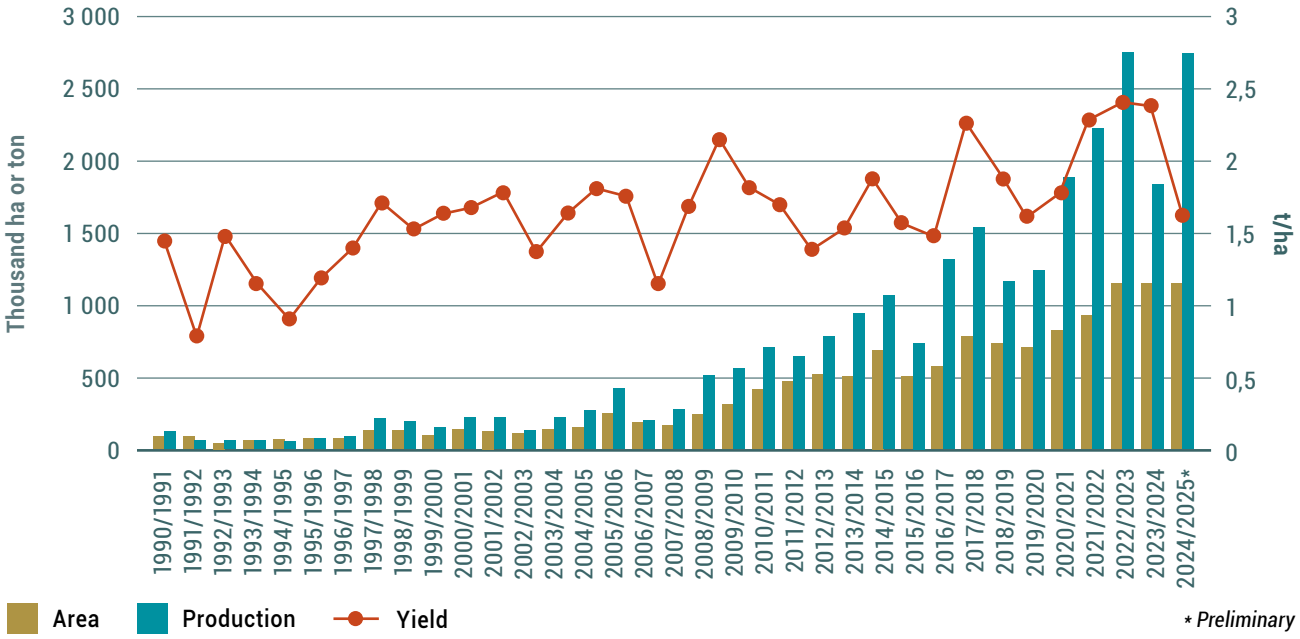


Table 2: Production overview for soybeans (2024/2025).

	2023/2024	2024/2025	5-yr average	10-yr average
Total planted (ha)	1 150 500	1 151 000	1 040 440	850 165
Total production (tons)	1 848 000	2 753 125	2 296 685	1 749 764
Average yield (t/ha)	2,2	2,6	2,2	2

3. Sunflower seed

Graph 3 illustrates the long-term trends of the area planted, production and yields of sunflower seed from 1990/1991 until the 2024/2025 production season. Total sunflower production (represented by turquoise bars) has fluctuated rather than followed a consistent growth trend, rising sharply in the late 1990s, declining in the early 2000s, and stabilising in recent years at around 600 000 to 850 000 ton.

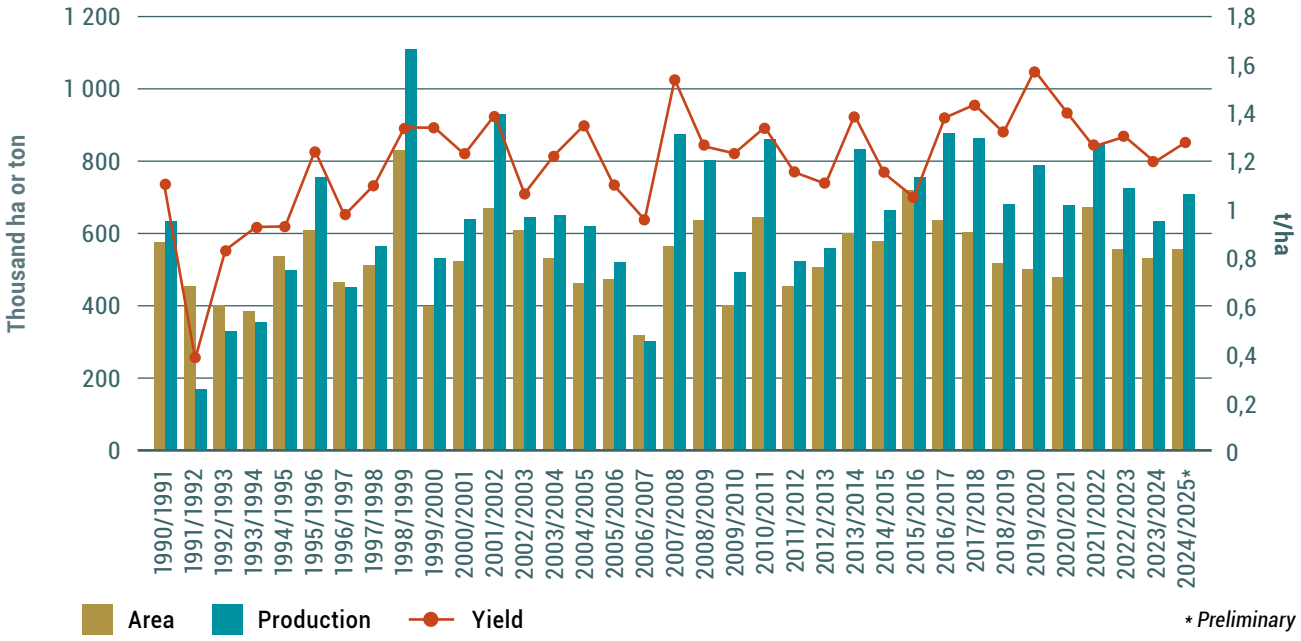
Yields have generally improved over time, reaching their highest levels during the 2019/2020 production season and decreasing ever since. The current yields for the 2023/2024 season have decreased and are projected to be higher next season.

The total area planted decreased by 26 700 ha from the 2022/2023 season to the 2023/2024 season (529 000 ha) and is projected to increase to 555 700 ha in the 2024/2025 season. This is lower than the 5-year average of 557 780 ha and ten-year average of 576 030 ha. The Free State remains South Africa's leading sunflower-producing region, followed by North West and Limpopo.

Table 3: Production overview for sunflower (2024/2025).

	2023/2024	2024/2025	5-yr average	10-yr average
Total planted (ha)	529 000	555 700	557 780	576 030
Total production (tons)	632 000	708 300	717 592	754 606
Average yield (t/ha)	1,13	1,39	1,3	1,3

Graph 3: Sunflower area planted, production, and yield.



4. Sorghum

Graph 4 (on page 28) illustrates the long-term trends in sorghum area planted, production, and yield in South Africa from the 1990/1991 to 2024/2025 production seasons. During this period, the sorghum industry has experienced significant fluctuations, with both area planted and production showing variable trends over time.

In the early 1990s, area planted and production levels were relatively high but have since declined steadily into the 2000s as producers shifted towards more profitable crops such maize and the consumer diets changed. From 2010 onwards, sorghum production stabilised at lower levels, fluctuating between 90 000 and 150 000 tons, while area planted ranged between 30 000 and 80 000 hectares. Yield improvements, however, have become more evident in the past decade, showing a steady upward trend as producers adopt better seed varieties and production practices.

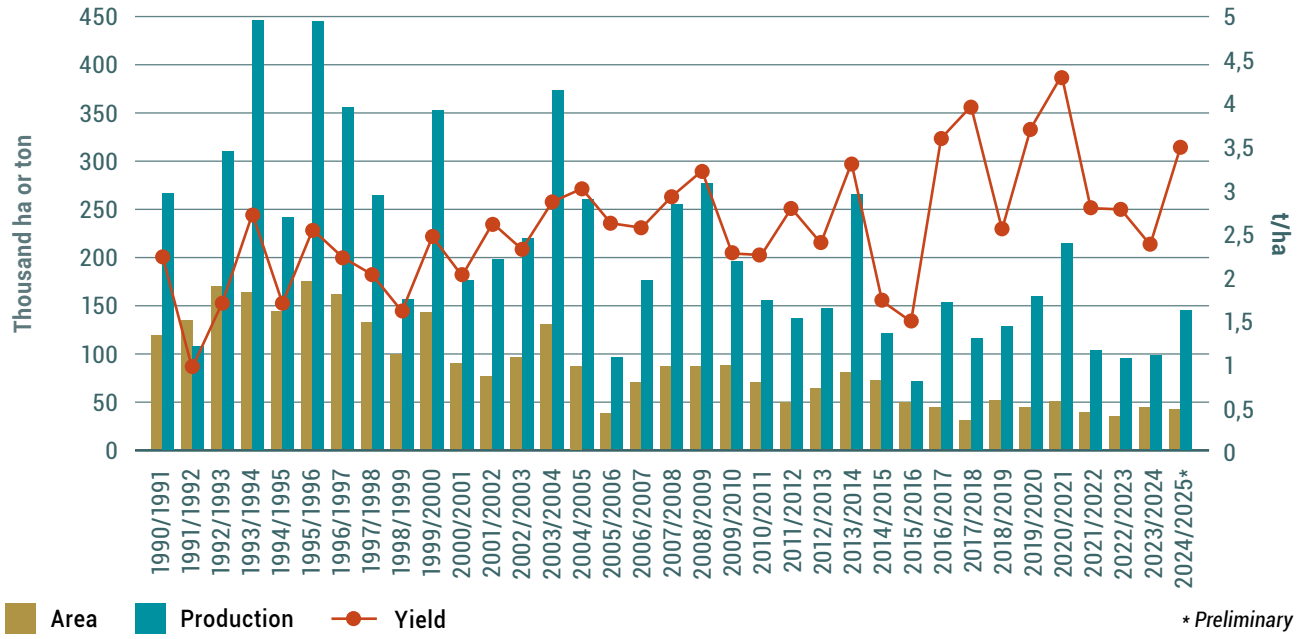
In the 2023/2024 season, sorghum production slightly increased by 3 640 tons compared to the previous season. Current production levels are 98 000 tons, still below the five-year average of 117 663 tons and the ten-year average of 120 292 tons. A slight recovery was seen in the current season, and this increase is mainly attributed to a larger planted area, with 42 100 ha planted compared to 34 000 ha the previous season. Similarly, the average yields have increased from 2,4 t/ha to 5,33 t/ha this season and this is above the five- and ten-year average of 2,82 t/ha and 2,91 t/ha, respectively.

Projections for the 2024/2025 season suggest further improvement in production to 144 665 tons, while the area planted is expected to remain stable at around 41 150 ha. The average projected yield for the season stands at 6,77 t/ha, higher than both the five-and ten-year averages of 2,82 t/ha and 2,91 t/ha, respectively.

Table 4: Production overview for sorghum (2023/2024).

	2023/2024	2024/2025	5-yr average	10-yr average
Total planted (ha)	42 100	41 150	41 244	41 738
Total production (tons)	98 000	144 665	117 663	120 292
Average yield (t/ha)	2,4	5,33	2,82	2,91

Graph 4: Sorghum area planted, production, and yield.



5. Groundnuts

Graph 5 below illustrates the trends in area planted, production, and yield for groundnuts in South Africa from the 1990/1991 to the 2024/2025 production season. Focusing on the red line (yield), it is evident that groundnut yields are highly variable. Similarly, the area planted and production highlight the volatility within the crop and the industry as a whole.

This variability is largely attributed to suboptimal growing conditions in South Africa, high labour costs, limited genetic improvements, and the specialised equipment required for groundnut cultivation. In the 2023/2024 season, groundnut yields averaged 0,77 t/ha, which is below the five-year average of 1,40 t/ha and the ten-year average of 1,73 t/ha.

Overall production levels have shown a declining trend, as indicated by the turqoise bars. The area planted has steadily decreased from a record high of 165 250 ha in 2001 to 31 000 ha in the previous season. Groundnuts are primarily cultivated in North West, followed by the Free State and Northern Cape provinces.

Graph 5: Groundnuts area planted, production and yield.

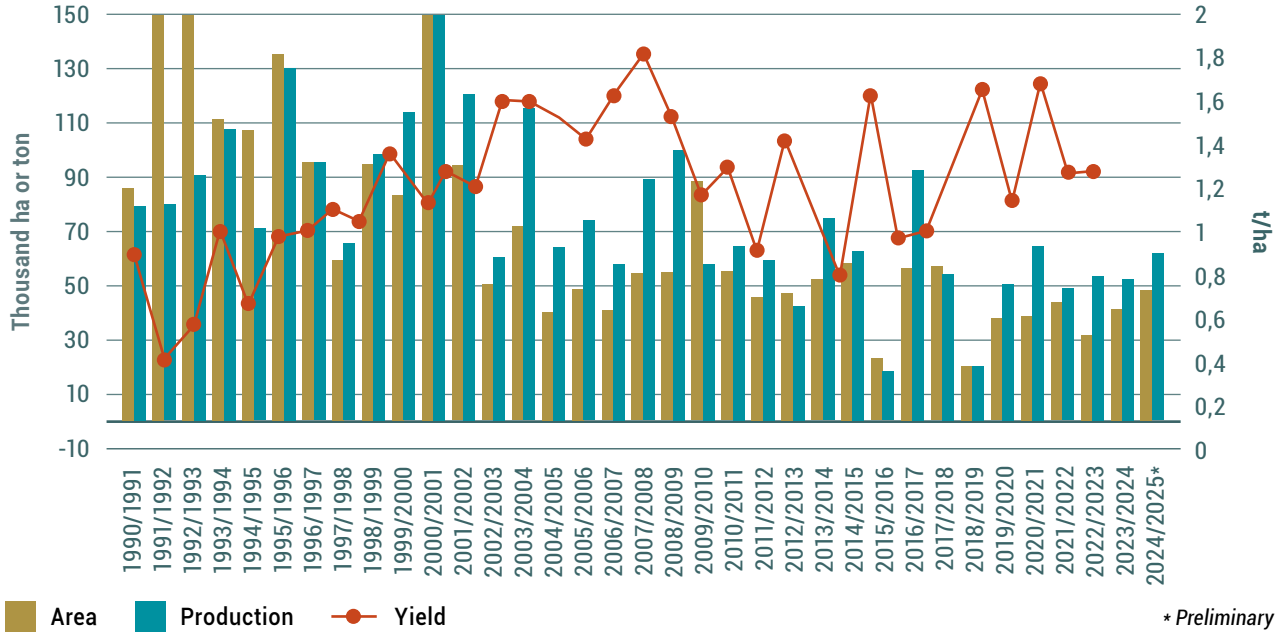


Table 5: Production overview for groundnuts (2023/2024).

	2023/2024	2024/2025	5-yr average	10-yr average
Total planted (ha)	41 200	48 125	40 515	39 503
Total production (tons)	52 000	61 389	55 838	51 278
Average yield (t/ha)	0,77	0,88	1,4	1,27

6. Wheat

Graph 6 illustrates the long-term trends in wheat area planted, production, and yield in South Africa of the largest winter grain industry, from the 1990/1991 to 2024/2025 production seasons. Over this period, the total area planted of wheat has shown a steady long-term decline, particularly since the late 1990s, as producers shifted to alternative crops with higher profitability and climate change, especially away from the northern parts of the country. However, despite this decline in area, yield levels have shown a consistent upward trend, reflecting technological progress, improved seed genetics, and better management practices.

During the 2023/2024 production season, a total of 537 950 ha of wheat was planted, 28 850 ha decrease compared to the 2022/2023 season, marking the second consecutive annual decline. This area remains 9 280 ha above five-year average and 21 069 tons above the ten-year average. The total production for the season is estimated at 2,09 million tons, with an average yield of 6 t/ha. While the reduction in area planted reduced total output, improved yield performance helped maintain stable production levels.

For the upcoming 2024/2025 season, wheat production is projected to slightly decrease to 1,92 million tons, with the planted area expected to decrease further to 486 000 ha. Despite this, yield levels are forecast to improve modestly to 6,16 t/ha, remaining above both the five-year average yield of 4 t/ha and the ten-year average of 3,6 t/ha. The Western Cape remains the largest wheat-producing region, followed by the Northern Cape and the Free State under irrigation.

Graph 6: Wheat area planted, production and yield.

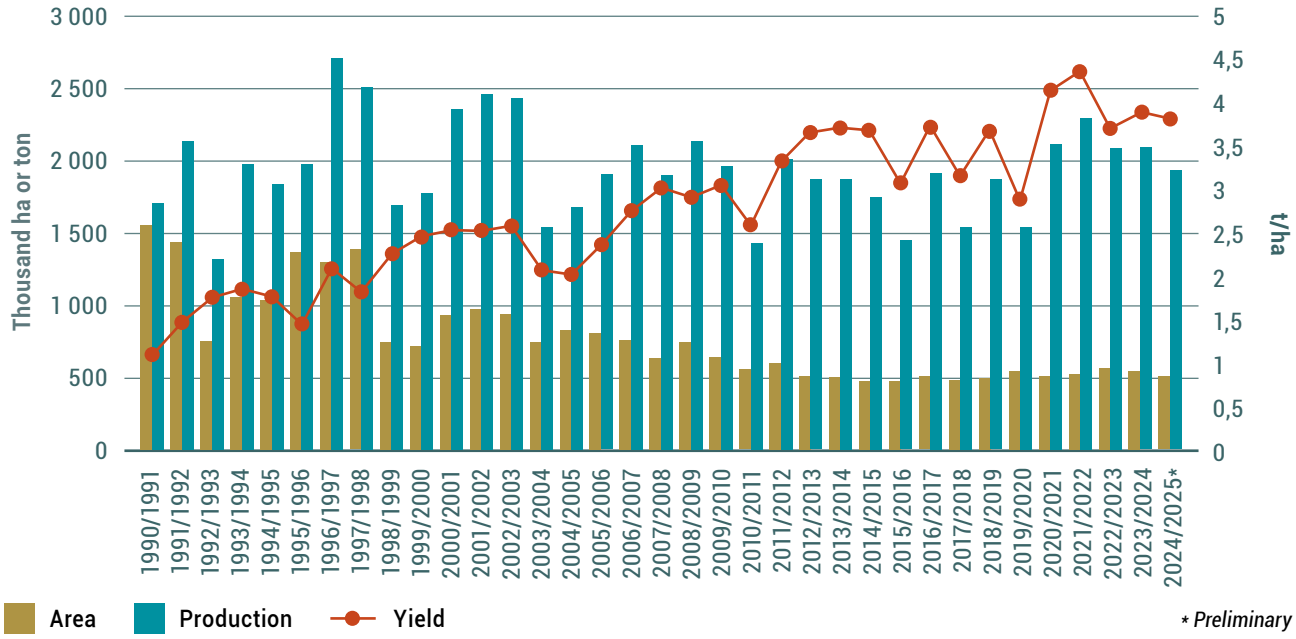


Table 6: Production overview for wheat (2023/2024).

	2023/2024	2024/2025	5-yr average	10-yr average
Total planted (ha)	59 772	56 144	528 670	516 882
Total production (tons)	2 089 025	1 924 890	2 099 321	1 880 162
Average yield (t/ha)	6,01	6,16	4	3,6

7. Barley

Graph 7 illustrates the long-term trends in malting barley, including area planted, production and yield in South Africa from the 2000/2001 to 2024/2025 production seasons. Over the past two decades, the malting barley industry has shown steady growth and stability, supported by strong demand from the brewing industry and ongoing improvements in production practices and seed technology.

In the 2023/2024 production season, the total area planted to malting barley was 107 600 ha, representing a 6 600 ha increase from the 2022/2023 season. This increase in area contributed to an estimated total production of 377 000 tons, with an average yield of 3,5 t/ha. Although yields remained consistent with the previous season, the slight expansion in planted area supported overall production growth.

For the 2024/2025 season, the area planted is projected to decline slightly to 100 700 ha, with production expected to reach 372 250 tons. The average yield is forecast to remain stable at 3,5 t/ha, aligning closely with both the five-year average of 3,58 t/ha and the ten-year average of 3,5 t/ha. Despite year-to-year fluctuations, long-term trends show clear improvement in both yields and total production. This continued performance reflects the resilience and efficiency of South Africa's barley production systems, particularly within the Western Cape, where malting barley is primarily cultivated.

Graph 7: Barley area planted, production and yield.

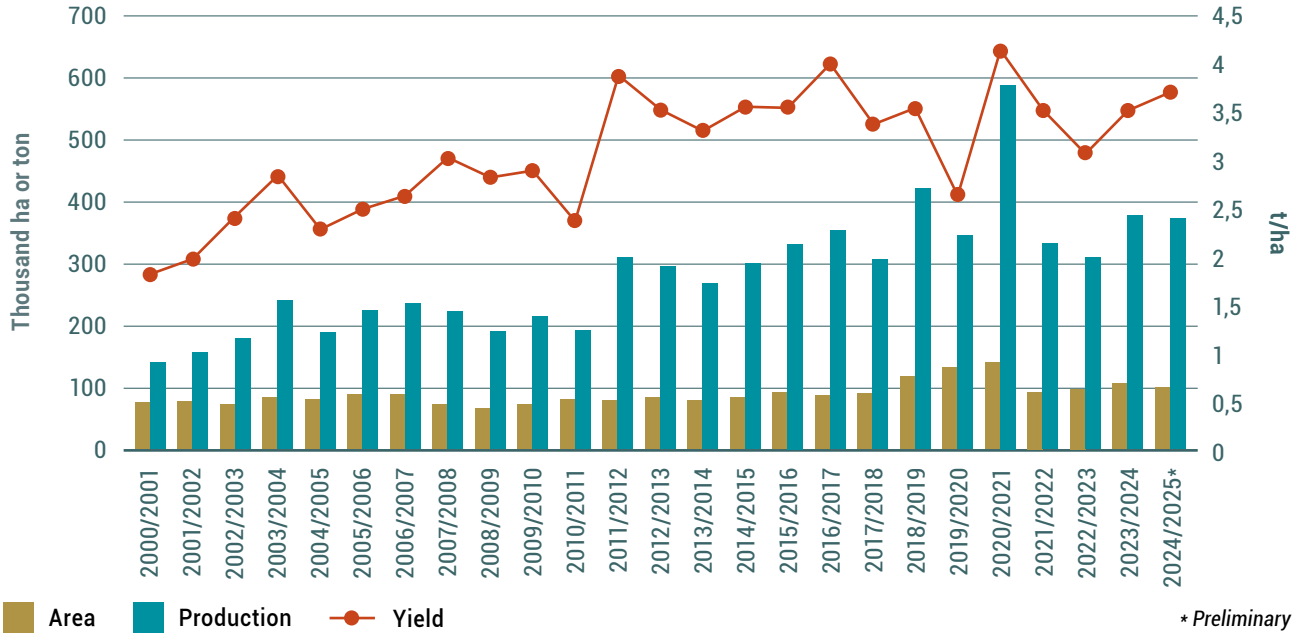


Table 7: Production overview for malt barley (2023/2024).

	2023/2024	2024/2025	5-yr average	10-yr average
Total planted (ha)	107 600	100 700	109 090	107 017
Total production (tons)	377 000	372 250	395 529	373 791
Average yield (t/ha)	3,5	3,7	3,58	3,50

8. Canola

Graph 8 illustrates the long-term trends in canola area planted, production, and yield in South Africa from the 1998/1999 to 2023/2024 production seasons. Over these 25 years, the canola industry has grown from a small niche crop to a key crop of the country's oilseed complex.

In the early 2000s, canola area planted fluctuated between 20 000 and 40 000 hectares, and from around 2010 onwards, the area began to expand more consistently as producers in the Western Cape embraced canola in crop rotation systems.

The most rapid expansion occurred during the 2020/2021 to 2023/2024 seasons, when the area planted increased above 130 000 ha, with a 74% increase seen over the past decade, since 2014. The area planted is projected to increase further to 165 750 ha in 2024/2025, well above both the five- and ten-year averages of 118 916 ha and 97 571 ha, respectively.

Production volumes followed a similar pattern. For much of the earlier seasons, total production remained below 100 000 tons. The most notable growth occurred after 2020, when production exceeded 200 000 tons, reaching a record 236 300 tons in 2023/2024 and projected to increase to 290 400 tons in 2024/2025. This is higher than the five-and ten-year average 220 000 tons and 159 557 tons, respectively.

In 2023, canola was planted in only four provinces, with the Western Cape taking the lead by 233 500 tons, followed by the Free State with just over 2 000 tons.

The red line represents the overall yield trends over the years. The average yield increased to 2,24 t/ha in 2023/2024 and is projected at 2,55 t/ha for 2024/2025, outperforming the five-year average of 2,41 t/ha and the ten-year average of 1,86 t/ha.

Graph 8: Canola area planted, production and yield.

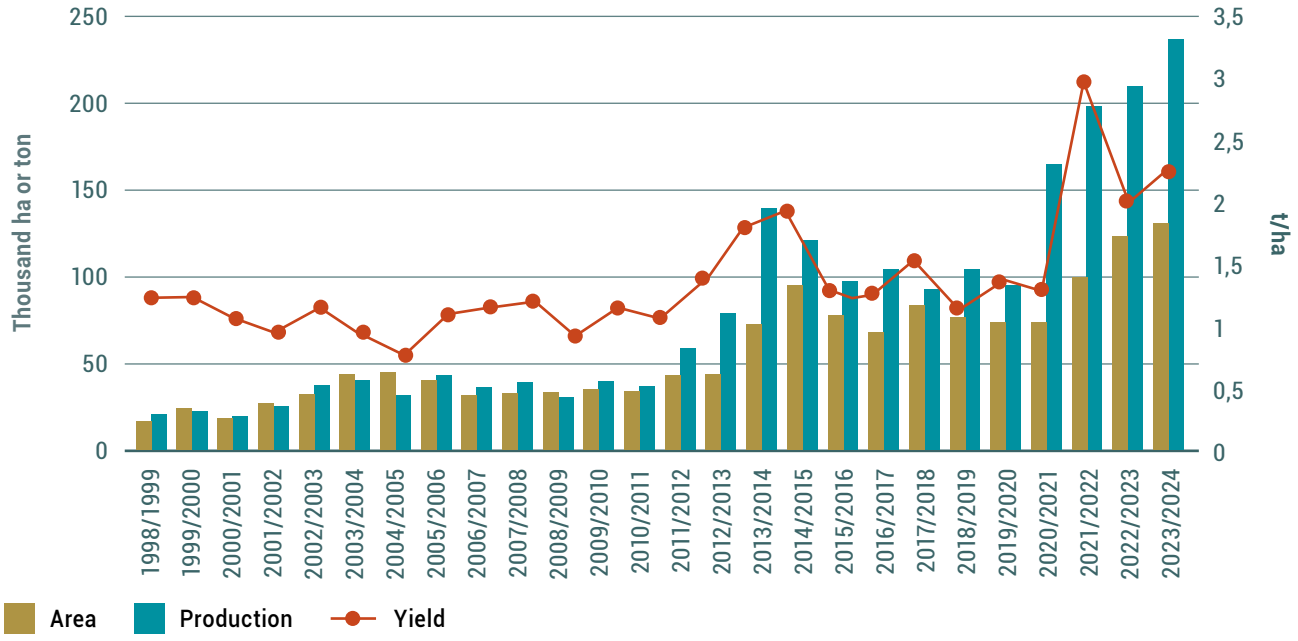


Table 8: Production overview for canola (2023/2024).

	2023/2024	2024/2025	5-yr average	10-yr average
Total planted (ha)	131 200	165 750	118 916	97 571
Total production (tons)	236 300	290 400	220 000	159 557
Average yield (t/ha)	2,24	2,63	2,41	1,86

GRAIN SA MEMBER SERVICES

Input overview

INPUT COSTS, VOLATILITY AND DISRUPTIONS CAUSE CHALLENGES

Input environment

INTRODUCTION

South Africa's reliance on imported agricultural inputs continues to expose the local market to global price volatility and supply disruptions. In 2025, this vulnerability remains prominent, with energy markets still impacted by Russia's invasion of Ukraine. Brent crude oil is currently trading at $64,62 per barrel, which is $7,38 lower than the price recorded at the same time in 2024. This is significantly below the peak of $125,95 per barrel seen in 2022, but still considerably higher than the $22,95 per barrel recorded in 2020.

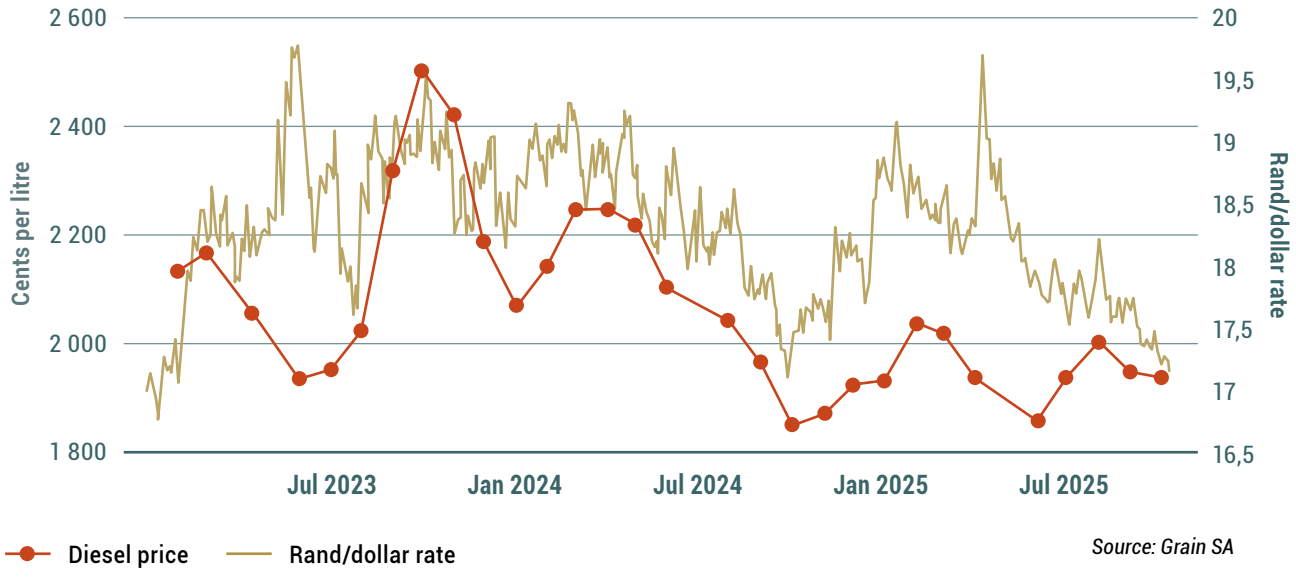
In 2024 we saw the natural gas market feel the strain of reduced Russian supplies to Europe, pushing prices higher globally. These energy market fluctuations have had a knock-on effect on input costs, particularly for fertilisers and chemicals. Now in October 2025 the council of the EU agreed to phase out imports of Russian natural gas due to Russia's weaponization of gas supplies and repeated disruptions of gas supplies to the EU. This will be a very important event to keep an eye on when considering the impact on the cost of fertilisers and chemicals.

Geopolitical instability also continues to affect global grain markets. Trade tensions between the United States and China have significantly impacted the CBOT soybean price, primarily due to reduced demand. This decline has had a spillover effect on the SAFEX price of local soybeans. However, as of 30 October, it appears that the two countries have reached an agreement, and soybean shipments to China are expected to resume immediately. As always, weather conditions in key production regions will continue to play a crucial role in shaping the global grain market.

For South African producers, the combination of rising input costs, currency volatility, and global supply chain disruptions presents ongoing challenges in 2025.

Graph 1 indicates volatility in the exchange rate and Brent crude oil price.

Graph 1: Rand/dollar exchange rate and diesel price.



Source: Grain SA

Dispute resolution

As a member benefit, Grain SA assisted various members during the reporting period – particularly with respect to dispute resolution. Disputes on seed quality, agrochemical damage, VAT, the diesel rebate and fertiliser quality were dealt with in collaboration with Grain SA members.

THE SEED INDUSTRY

Seed remains a crucial production input for crop production, accounting for between 10% and 17% of a producer's variable production costs, depending on planting density. With ongoing advances in genetics and technology, seed continues to be one of the most significant factors in driving increased yields and overall productivity in the grain industry. Grain SA continues to monitor seed prices closely, striving to maintain transparency and competitiveness in the market.

Key concerns, such as the consistent increase in seed prices, remain a major issue for grain producers. In addition, the ongoing legal challenges and regulatory discussions surrounding genetically modified (GM) crops, including the recent SCA ruling on drought-tolerant GM maize, are likely to impact seed availability and pricing dynamics. Grain SA's ongoing dialogue with seed companies and the Southern African National Seed Organisation (SANSOR) ensures that the concerns of producers are heard and addressed. With resistance to high seed prices building, these discussions will be critical in shaping pricing decisions for seasons to come.

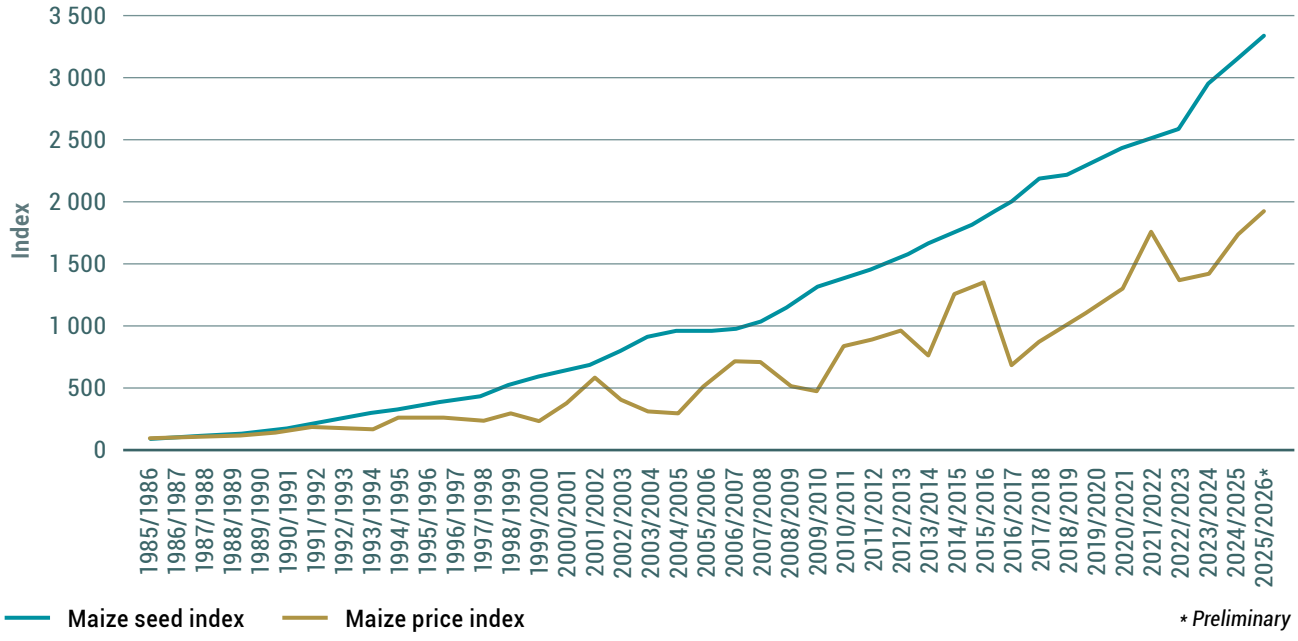
Seed prices

The percentage change in 2025 seed prices showed that maize seed prices increased with 2,3%. Sorghum seed prices increased with 6,2%, while soybean seed prices increased the most by 6,9%. Sunflower seed prices increased by an average of 4,3%.

A good barometer for assessing price increases is the producer price index (PPI). Up until July 2025, when seed prices were published, the PPI was 1,5%. On an average basis seed prices thus increased below the PPI rate.

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**) weakened significantly compared to the maize seed price index. With an estimated average producer price[1] of R4 463 per ton for the coming season (2025/2026), in general divergence remains between the maize price index and maize seed prices, with a widening gap between the two.

Graph 2: Indices of the price of maize seed and the producer price of maize.



** Preliminary*

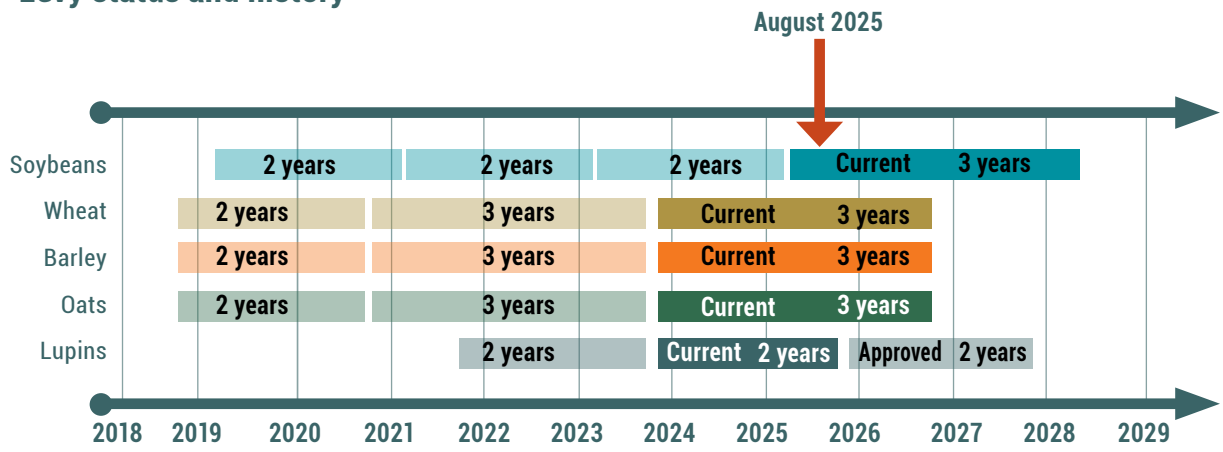
Source: Grain SA

[1] *Average producer price = SAFEX, July 2024 price, less (average differential cost + handling costs)*

Breeding and technology levy

The breeding and technology is well established now. Wheat, barley and oats have been going strong for seven years followed by soybeans for six years. Starting from 1 October 2021, a breeding and technology levy has also been implemented for lupines to attract new and better cultivars to the South African market.

Levy status and history



Source: SACTA

It is very important for Grain SA to monitor the success of the breeding and technology levy. Not only for producers that are paying the levy, but also for seed and technology companies that needs to invest, both parties need to be satisfied with the working of the system and trust that the system would have the desired outcomes.

For producers it would be measured in for example new, lower seed prices, higher yielding cultivars and technology that increases efficiencies. For seed companies on the other hand, trust that their investment would have returns if their seed performs well, is important. If the desired outcomes are not achieved, it is important to be transparent about it and address the problems or re-look the system all together.

The success measured so far with the breeding and technology levy can be summarised as follows:

For winter cereals

- New companies have entered the wheat seed market – four companies are now involved in in the wheat seed market.
- Eleven new cultivars have been approved for final release.
- 20 other cultivars were also approved for preliminary release.
- Of the eleven on final release, five were for irrigation, five for the Western Cape and one for the northern dryland areas.
- In 2025 one new cultivar for the northern dryland, two cultivars for the southern area and six cultivars for irrigation has been released.
- New technology: BioCeres (HB4 gene) drought tolerant gene to be tested on wheat.

For soybeans

During Congress in March 2024, Grain SA resolved to continue with the breeding and technology levy, or the SACTA levy, as it is popularly called. Since the end of February 2025, this levy has been in effect for seven years. Soybean producers resolved at Congress to extend this levy by three years, but on condition that a clear performance criterion be set to measure the success of the levy.

- Many new cultivars have entered the market – 67 new cultivars from June 2022 to June 2023. From June 2023 until December 2024, 64 new cultivars were released.
- New technology has been approved and is being commercialised – the Intacta RR 2 gene – bollworm resistant. Corteva's Concesta E3 technology has also been approved and commercialisation is planned for 2024/2025 season; as well as a drought gene from BioCeres (HB4 gene) that has been tested for its second year – application for registration was submitted to the GMO Act at the end of 2023.

- Greater competition between companies and cultivars creates a healthy environment for producers.
- In 2024 at Grain SA's Congress it was decided that the soybean breeding and technology levy would continue for the next three years; therefore it continued throughout 2025.
- It was decided that the levy would still continue at 1,2% of the soybean price. Below a breakdown of the levy for the extended three years that was decided on in 2024:

From March 2025 the levy has been as follows:

	Year 7	Year 8	Year 9
Marketing year	2025/2026	2026/2027	2027/2028
Five-year shifting average soybean price	R5 831	R6 048	R6 996
Levy % of the soybean price	1,2%	1,2%	1,2%
Calculated soybean levy (per ton)	R70	R73	R84

Annual meeting with SANSOR

Grain SA met with SANSOR on 15 September 2025 for our annual meeting.

Liaison with SANSOR on a regular basis is important to ensure that problems can be solved together. At the same time, greater efficiencies in grain and oilseed production can be achieved. Important issues that were addressed with the representative body of the seed industry include:

- Maize seed exports to the USA
- Sclerotinia on soybean and sunflower
- New breeding techniques/Plant breeding innovation
- International and local market trends
- Budget production costs for the 2025/2026 production season
- New cultivars vs new active ingredients
- Feedback on breeding and technology levies/Success criteria
- Maize cultivar evaluation trials
- Goss's wilt
- Seed borne diseases
- New Plant Breeders Rights Act
- Availability of seed
- GMO Monitoring Project

THE FERTILISER INDUSTRY

South Africa imports more than 80% of its fertiliser requirements, the volatile rand has added additional pressure to fertiliser prices and a weaker currency makes imports more expensive. Despite these challenges, South Africa's monetary policy offers some relief.

Over the past three years, the fertiliser market has been under significant pressure, primarily due to the ongoing Russian invasion of Ukraine. As one of the world's largest producers of ammonia, urea, potash, and processed phosphates, Russia's disruption of supply chains had a profound effect on global fertiliser markets. Russia accounts for 23% of global ammonia exports, 14% of urea, 21% of potash, and 10% of processed phosphates, while also supplying about one-third of Europe's natural gas, a key feedstock in nitrogen fertiliser production. The withdrawal of Russian fertiliser from global markets exacerbated supply shortages and led to sharp price increases.

Fertiliser prices

From September 2024 to September 2025, international fertiliser prices have increased almost across the board. Only Ammonia saw a decrease of almost 25%. The rand/dollar exchange rate stayed rather stable, strengthened by 0,68%. **Table 1** (on page 36) shows the year-on-year price changes of international fertiliser prices in dollar terms.

Table 1: International fertiliser prices in dollar terms.

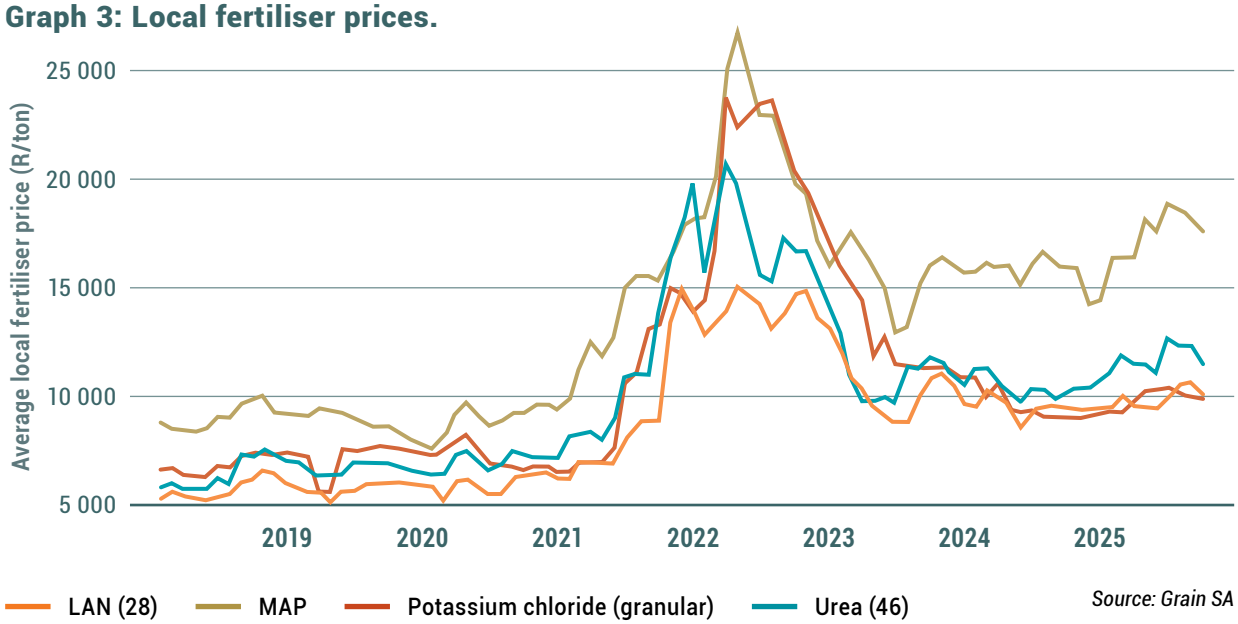
	Sep 2024	Sep 2025	% change
Fertiliser	Dollar/ton	Dollar/ton	%
Ammonia (Middle East)	397	319	-24,45%
Urea (46) (Eastern Europe)	339	396	14,39%
DAP (USA Gulf)	605	716	15,50%
KCL (CIS)	290	375	22,67%
Rand/dollar exchange rate	17,58	17,46	-0,68%

Table 2 indicates international fertiliser prices in rand terms, with exchange rate effect on prices. **Graph 3** also indicates the gradual increase that was experienced during the year and the slight decrease that is seen during the ending months of 2025.

Table 2: International fertiliser prices in rand terms.

	Sep 2024	Sep 2025	% change
Fertiliser	Rand/ton	Rand/ton	%
Ammonia (Middle East)	6 979	5 570	-20,19%
Urea (46) (Eastern Europe)	5 960	6 914	16%
DAP (USA Gulf)	10 636	12 501	17,53%
KCL (CIS)	5 098	6 548	28,44%

Graph 3: Local fertiliser prices.



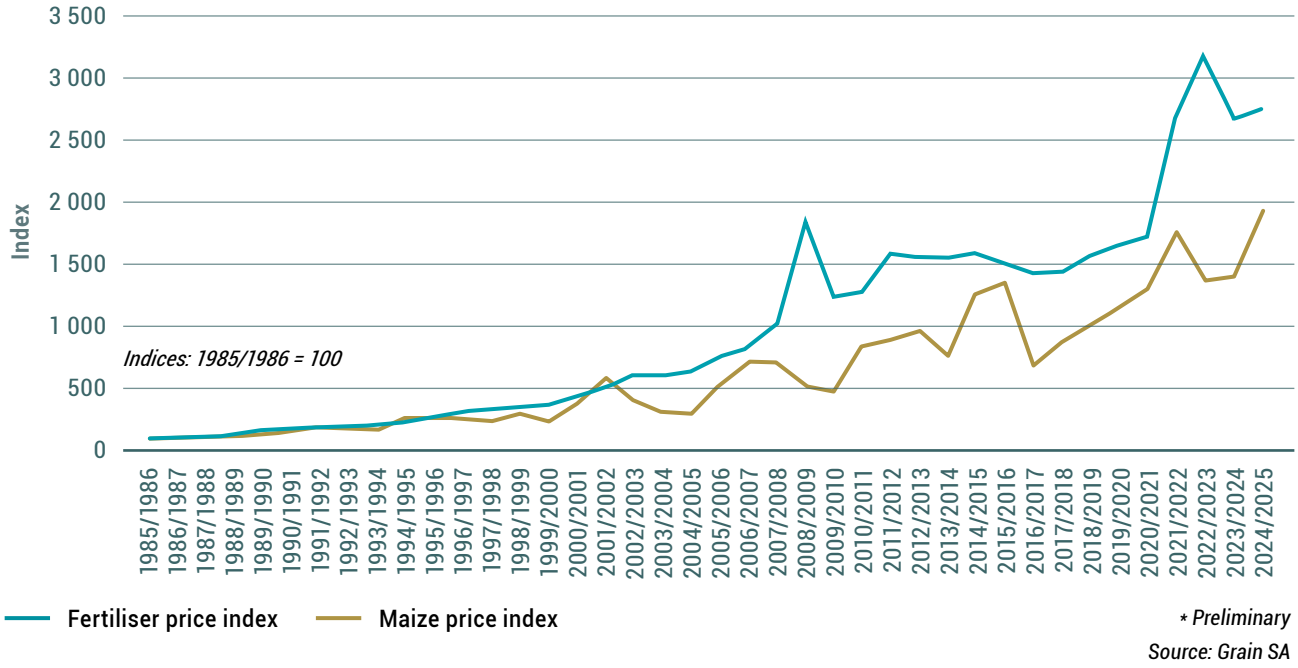
Source: Grain SA

Table 3: Local fertiliser prices.

	Oct 2024	Oct 2025	% change
Fertiliser	Rand/ton	Rand/ton	%
LAN (28)	9 362	10 059	7,44%
Urea (46)	10 045	11 489	14,37%
MAP	15 864	17 646	11,23%
KCL	8 899	9 784	9,95%

Graph 4 below shows the fertiliser price index compared to the maize price index since the 1985/1986 production season. At an average producer price[2] of R4 462 per ton for 2024/2025 production year, the gap between the maize price index and the fertiliser price index continues to widen, this is no surprise given the sharp increase in fertiliser prices.

Graph 4: Indices of the producer price of maize and the prices of fertiliser.



** Preliminary*

Source: Grain SA

Annual meeting with FERTASA

The annual meeting between Grain SA and the Fertilizer Association of Southern Africa (FERTASA) took place on 21 July 2025.

Important matters discussed at the meeting include:

- International and local market trends
- Production cost budgets for the 2025/2026 season
- SA's dependence on imports versus local production
- International and local market fertiliser situation
- Availability and transport logistics
- Local agricultural lime situation
- Fertiliser Bill
- Progress with fertiliser quality monitoring/Future of project
- Boron Issue (DoA) and other A1 and B1 substances

[2] *Average producer price = SAFEX, July 2024 price, less (average differential cost + handling costs)*

AGROCHEMICAL INDUSTRY

Prices

Almost all of the active ingredients required for the production of agricultural inputs in South Africa are imported. As such, fluctuations in international prices and exchange rates are critical factors, as they directly impact the cost structure of domestic agricultural inputs and, consequently, the pricing trends for grain production.

Table 4 shows the international prices of the active ingredients of five herbicides used in maize. The stability in the exchange rate led to the trends seen in the international market being pulled directly through to the prices in rand terms.

Table 4: International herbicide prices in rand terms.

	Sep 2024	Sep 2025	% change
	Rand/ton	Rand/ton	%
Glyphosate (95%)	62 125	66 872	7,64%
Acetochlor (92%)	57 450	45 082	-21,53%
Atrazine (97%)	54 759	47 823	-12,67%
Metolachlor (97%)	79 729	53 131	-33,36%
Trifluralin (95%)	83 234	63 048	-24,25%

Table 5 indicates international insecticide prices, which are used in maize production (rand terms).

Table 5: International insecticide prices.

	Sep 2024	Sep 2025	% change
	Rand/ton	Rand/ton	%
Imidacloprid (95%)	162 585	153 175	-5,79%
Lambda-cyhalothrin (95%)	234 369	232 620	-0,75%
Carbofuran (99%)	227 075	220 869	-2,73%
Deltamethrin (98%)	843 292	836 997	-0,75%

Annual meeting with the crop protection industry

On 1 August 2025, Grain SA's Production/Input Working Group met with CropLife SA, and the following issues were discussed:

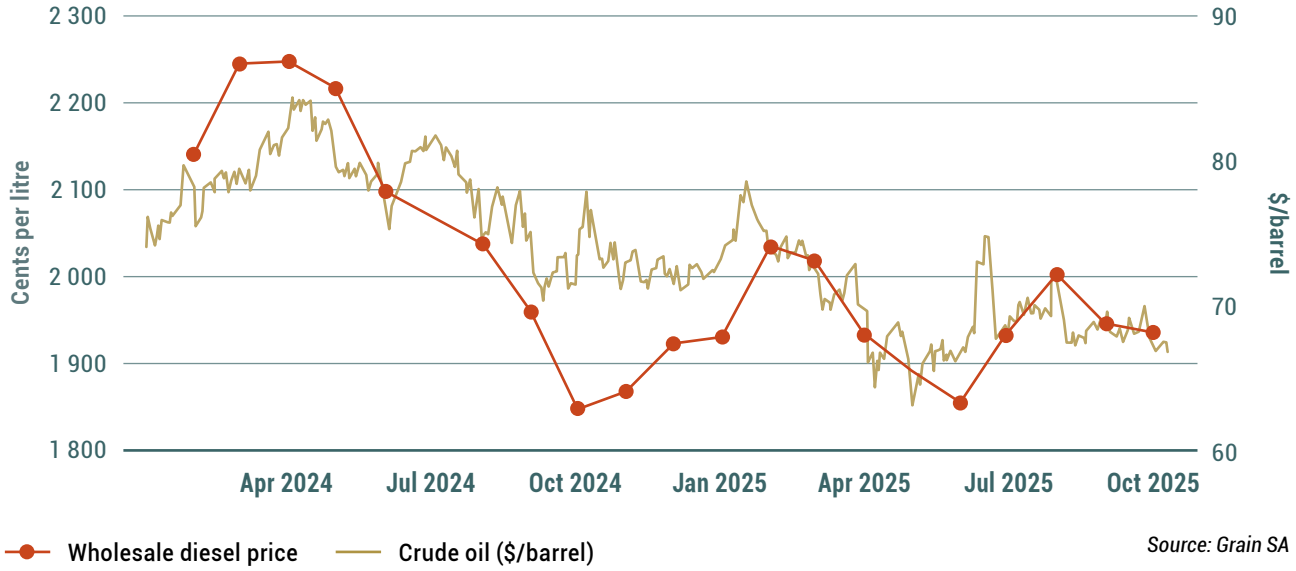
- The rise of activism in South Africa and its impact on agriculture
- Actions that the CropLife SA industry association will be taking to address the rising risk
- Actions that Grower Associations can undertake to address the risk of rising activism
- How can Grain SA & CropLife SA collaborate to mitigate the assault on valuable plant protection tools and the resultant loss of said tools
- Status of backlog with office of the Registrar (Act 36 of 1947)
- Progress with derogation process – substances of concern
- PCO regulation for restricted agricultural remedies
- Support for empty pesticide collection and recycling programme
- Clear indications of active on labels of chemical agents – uniformity of a product through the season, colours of plugs
- Glyphosate aerial application
- International and local market trends of grain industry

- Preliminary production cost budgets for the 2025/2026 production season
- Local and international market trends of crop protection industry
- Local pricing trends and any availability issues that can be shared

DIESEL INDUSTRY

Prices

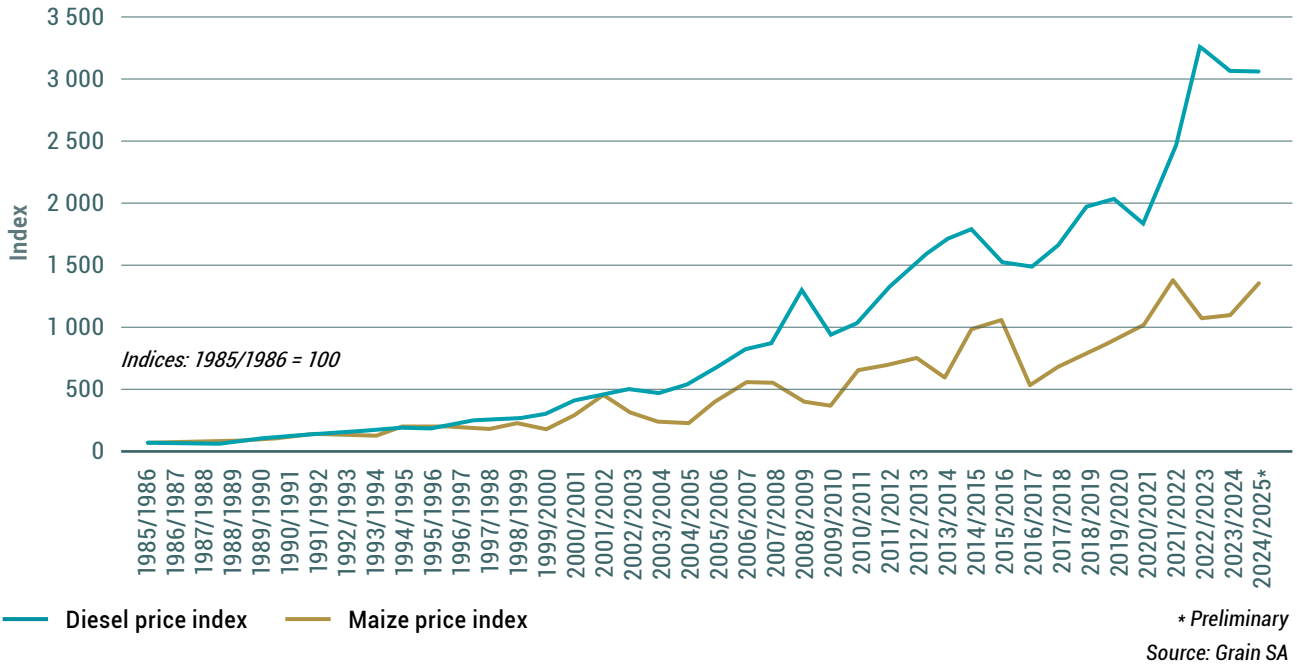
Graph 5: International Brent crude oil price and the wholesale price of diesel.



Source: Grain SA

The maize price index and the diesel price index are shown in **Graph 6**. Given an expected producer price[3] of R3 400 per ton for maize for the coming season, together with increases in diesel prices, the gap between the two remains.

Graph 6: Indices of the producer price of maize and the wholesale price of diesel.



** Preliminary*

Source: Grain SA

[3] *Average producer price = SAFEX, July 2024 price – (average differential cost + handling costs)*

Availability of diesel

No serious shortages of diesel were experienced in the reporting period.

Diesel rebate

The diesel rebate for which producers qualify consists of 40% of the general fuel tax and 100% of the Road Accident Fund levy. The South African Diesel Rebate Programme provides significant financial relief to agricultural producers by refunding a portion of the fuel levies (fuel and Road Accident Fund levies) paid on diesel used in qualifying agricultural activities. This rebate applies to diesel used off-road, aimed at reducing the high operational costs of fuel consumption that are integral to agricultural production.

Eligible sectors, including crop and livestock farming, may claim up to 80% of their diesel purchases for qualifying activities. This will change to 100% of their diesel purchases for qualifying activities from the end of March 2026. As of 2024, the rebate amounts to 366 cents per litre on land-based activities like farming and forestry. To participate, producers must be registered for VAT and complete the necessary documentation with SARS. Easing the cost burden of fuel, the diesel rebate programme helps improve the competitiveness of South African agriculture, supporting the sustainability and profitability of farming operations.

AGRICULTURAL MACHINERY INDUSTRY

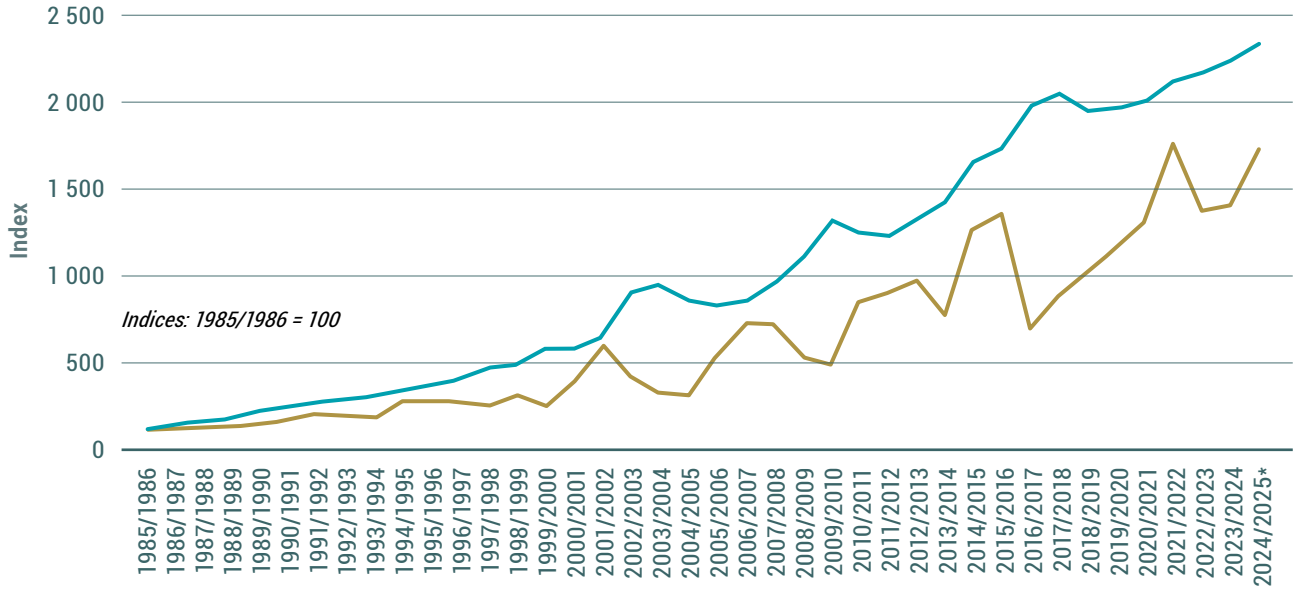
Table 6: Price changes in agricultural machinery equipment.

Equipment class	Month-on-month change %		Trend
	Aug 2025	Sep 2025	
Tractors	5,4	5,5	Up
Combine harvesters	6,7	6,6	Down
Hay and forage equipment	2,0	2,6	Up
Implements	0,8	0,7	Down
Overall	**4,5**	**4,7**	**Up**

Source: AGFACTS

Graph 8 compares the price indexes of the tractor price and the maize price since 1985/1986.

Graph 8: Indices for the producer price for maize and the prices of tractors.



** Preliminary*

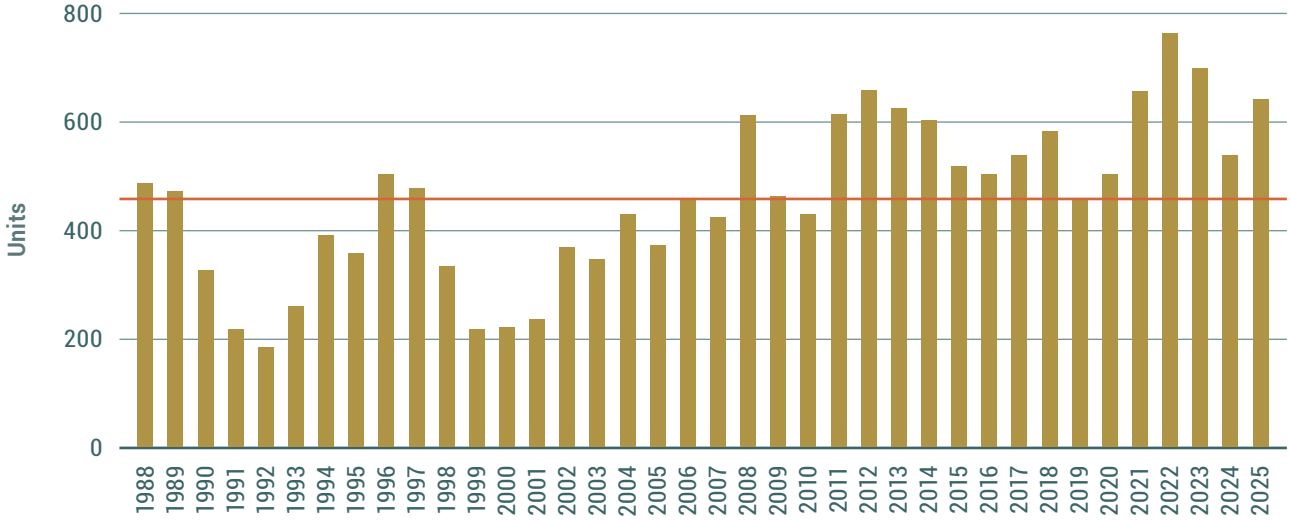
Source: Grain SA

Tractor sales

Graph 9 depicts what is currently happening with tractor sales in the South African market. Note that these figures exclude exports and include only local sales. Annual tractor sales during this period (1988 to October 2025) varied between a minimum of 2 207 units in 1992 and a maximum of 9 175 units in 2022.

Tractor sales have shown strong growth in 2025, with 5 773 units sold between January and September – a 22% increase compared to the same period in 2024. The AGFACTS Tractor Sales Index has also risen steadily since January, reaching 1 090 in September, indicating a positive market trend. September alone saw 758 tractors sold, nearly 15% more than the previous year. Combine harvester sales, while more volatile, have also shown resilience. Although only eight units were sold in September (down from 17 last year), year-to-date sales are approximately 17% higher than in 2024.

Graph 9: Annual tractor sales.

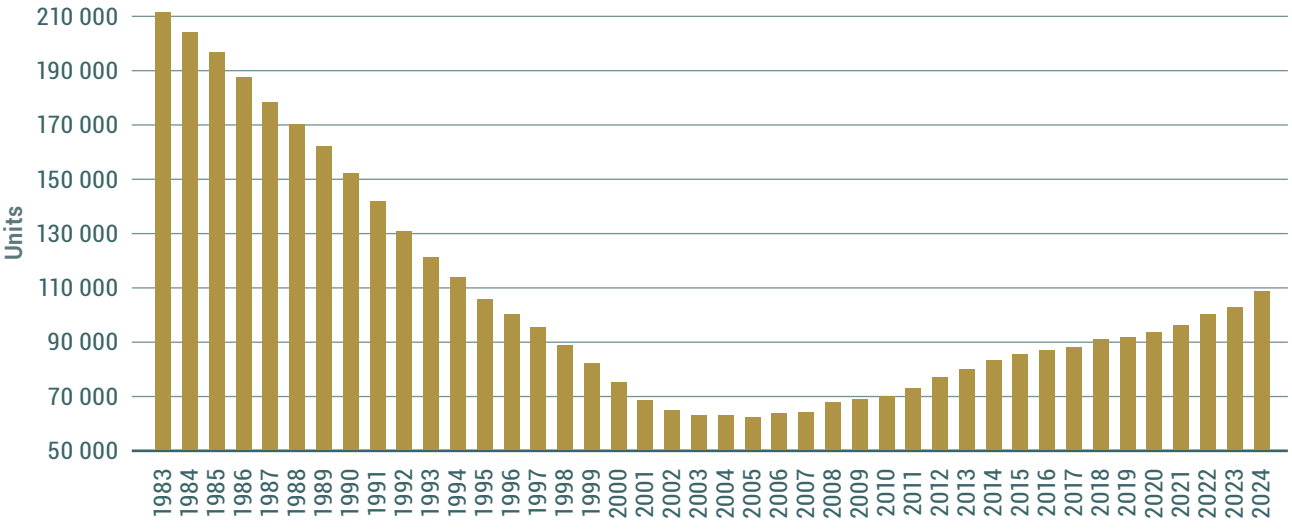


Source: Grain SA

Tractor fleet

At the end of 2024, the country's tractor fleet stood at 108 901 units (**Graph 10**). There has been a notable decrease in the size of the tractor fleet over the years (1983 to 2005) and then a slow but upward trend from 2006 to 2024; the main reason for that is the smaller summer and winter grain plantings over time, as well as the increased sales of bigger than average-sized (kW) tractors.

Graph 10: Total tractor fleet.

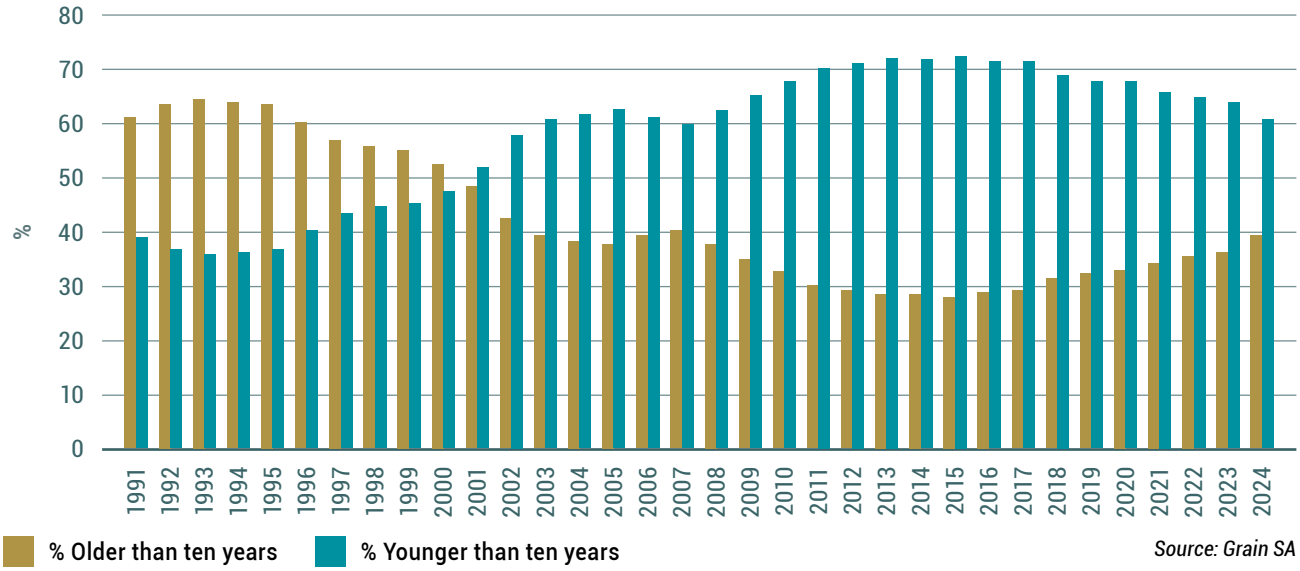


Source: Grain SA

Tractor age

- The average age of the tractor fleet by the end of 2024 is 7,9 years. **Graph 11** indicates the trend in the distribution of age in the tractor fleet.
- The current tractor fleet of 108 901 units is 74% higher than the fleet of almost 62 424 units in 2005.
- The total number of tractors under ten years is currently about 66 023 units, 60% of the current tractor fleet. The percentage of tractors under ten years was at a low point in 1993 when 35,8% of the tractor fleet was younger than ten years.

Graph 11: Average age of the tractor fleet.



Source: Grain SA

ANNUAL MEETING WITH SAAMA

On 22 July 2025, Grain SA again met with the South African Machinery Association (SAAMA) to discuss mutual challenges in the grain and oilseed industries. Important issues discussed were the following:

- International and local market trends for the grain industry
- Budget production costs for the 2025/2026 production season
- Prices of agricultural machinery
- International and local trends
- Motor Industry Ombudsman of South Africa (MIOSA)
- Durban Harbour and abnormal loads
- Import rebate on tractor tyres – feedback on progress was given
- Logistical challenges of parts and tractors

GRAIN SA MEMBER SERVICES

Income and production cost

COSTS OF CROPS PROVIDES INSIGHT ON PROFITABILITY

1. Actual production cost

Grain SA collected or bought data and information during December 2024 and January 2025 to determine the major maize production areas' actual income and production costs for the 2023/2024 production season. Determining and gathering the historical actual income and production cost figures is important to the industry as it identifies the actual cost for various inputs and provides insight into the profitability of a crop. Data was collected from various associations, regularly updated, and shared with key stakeholders in the maize industry.

The actual income and production cost analysis for dry land maize for the 2023/2024 production season can be seen in **Table 1.1** below. The table shows that variable input costs increase from the western to the eastern parts of the country. Variable input cost in the North West province is calculated at R11 959/ton per hectare, while it is around R22 819/ton in KwaZulu-Natal.

Table 1.1: Actual income & production cost figures for dry land maize (2023/2024 year).

Production cost per hectare	North West	North West Free State	Eastern Free State	KwaZulu-Natal Eastern Highveld
1. Variable cost				
Seed	1 698,90	1 327,50	2 427	3 893
Fertiliser and lime	3 299,05	4 566	4 299	7 734
Weed and pest control	1 392,68	1 488	1 664	4 854
Fuel	1 116,66	1 377	1 670	1 675
Repairs and parts	932,44	854	1 701	1 670
Crop insurance	338,72	112,50	345	749
Casual labour	250,30	38	18	127
Permanent labour	398,39	462,50	1 235	1 486
License and insurance	-	-	-	685
Marketing cost	288,95	115	382	-
Drying and cleaning cost	-	23,50	224	-
Interest on production credit	126,39	521	1 200,68	951
Contract work	196,90	382	381	672
Other costs	752,07	598	1 547,20	-
Total variable cost	**10 791,45**	**11 868**	**17 093,88**	**24 496,00**
2. Capital cost	**1 181,91**	**1 486,50**	**1 263,30**	**1 049,27**
Total cost per hectare	**11 973,36**	**13 354,50**	**18 357,18**	**25 545,27**
Yield (ton/ha)	**2,40**	**3,95**	**6,80**	**9,60**
3. Income				
Producer price (R/ton)	3 777,78	3 912,50	3 901	3 867
Producer price (R/ha)	9 066,67	15 454,38	26 526,80	37 123,20
Profit/loss/ha	**-2 906,69**	**2 099,88**	**8 169,62**	**1 206,03**

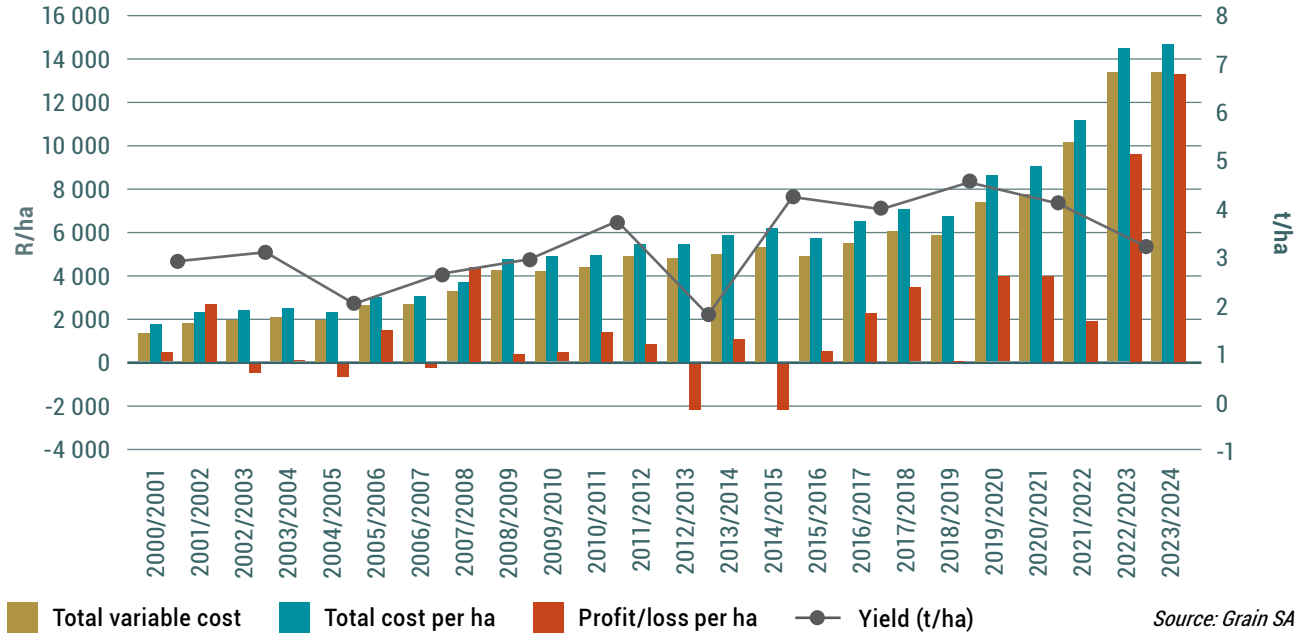
Source: Grain SA

2. Actual income and production cost figures for dry land maize

While Table 1.1 depicts the actual production figures for the previous year for the main production regions. **Figures 2.1** to **Figure 2.4** depict the long-term actual production cost, yields and profit/loss situation of the North West province, North West Free State, Eastern Free State and KwaZulu-Natal since 2000/2001. This is just to illustrate the type of long-term information that is gathered over time.

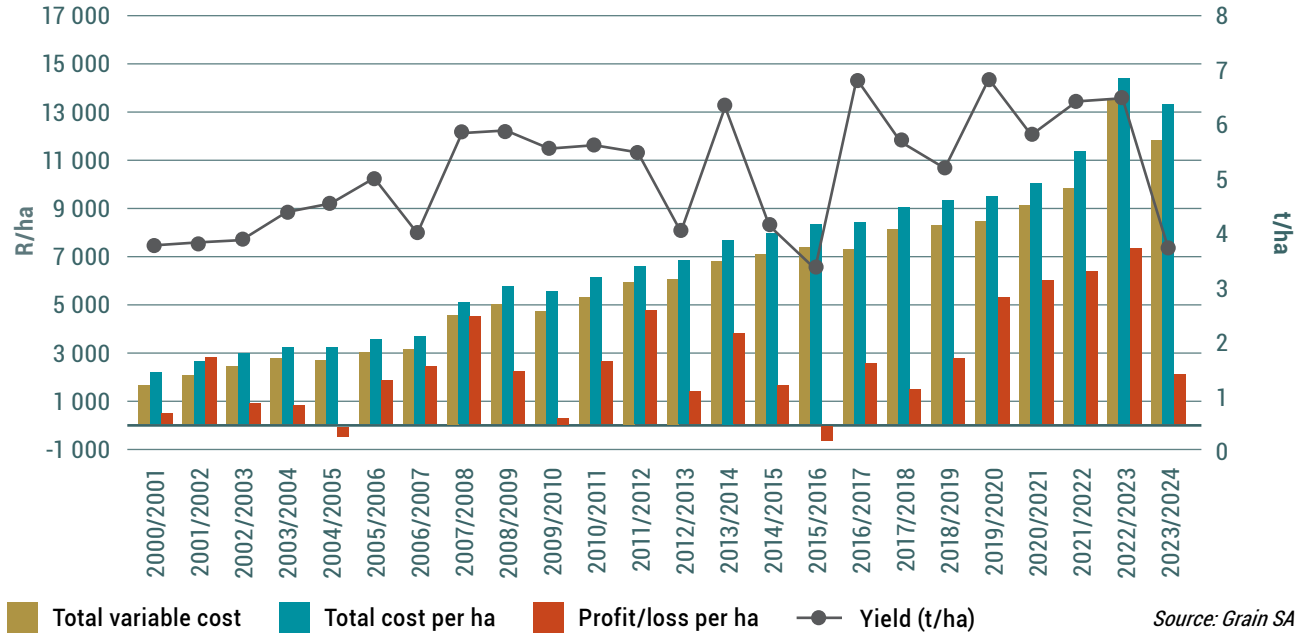
From the figures below, production costs are constantly increasing over time. These increases on a year-to-year basis are high and have a huge impact on producers to adapt and adjust their current production systems to produce profitable maize. The yield unpredictability can be seen over the long-term data presented and indicates the big impact it has on profitability. The 2023/2024 season was generally a very good production year, and good yields were obtained (except for North West); this brought some relief to producers' financial situations.

Figure 2.1: Actual production cost, yield and profit/loss of maize for the North West province.



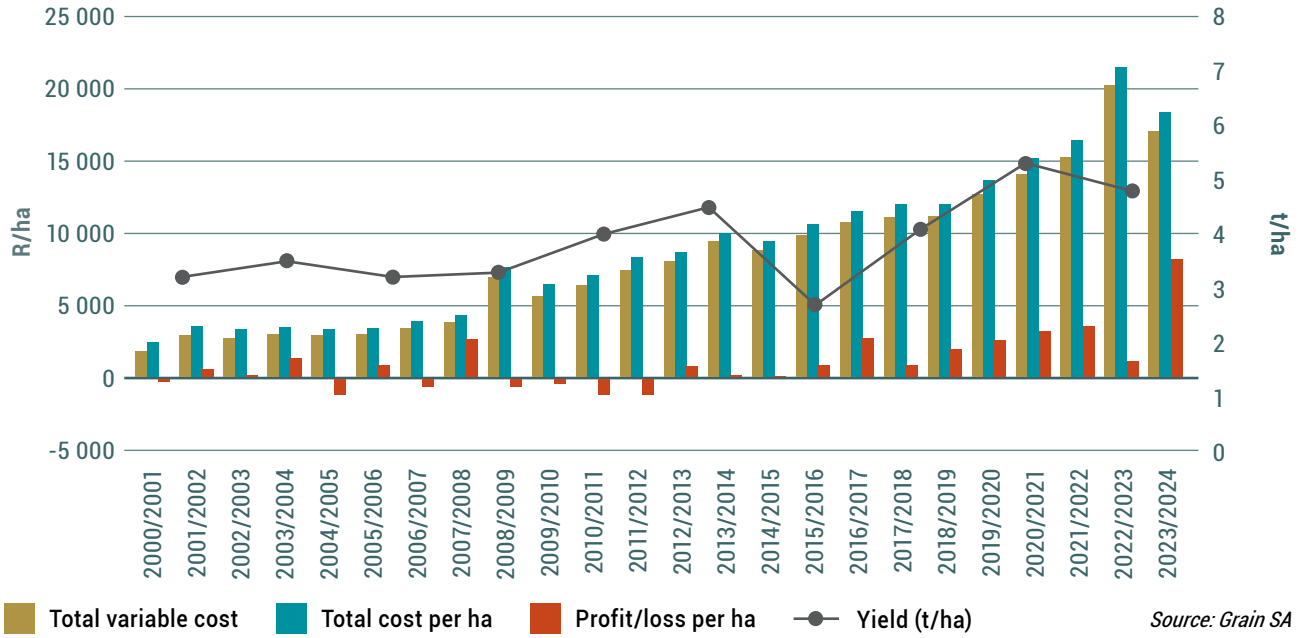
Source: Grain SA

Figure 2.2: Actual production cost, yield and profit/loss of maize for the North West Free State.



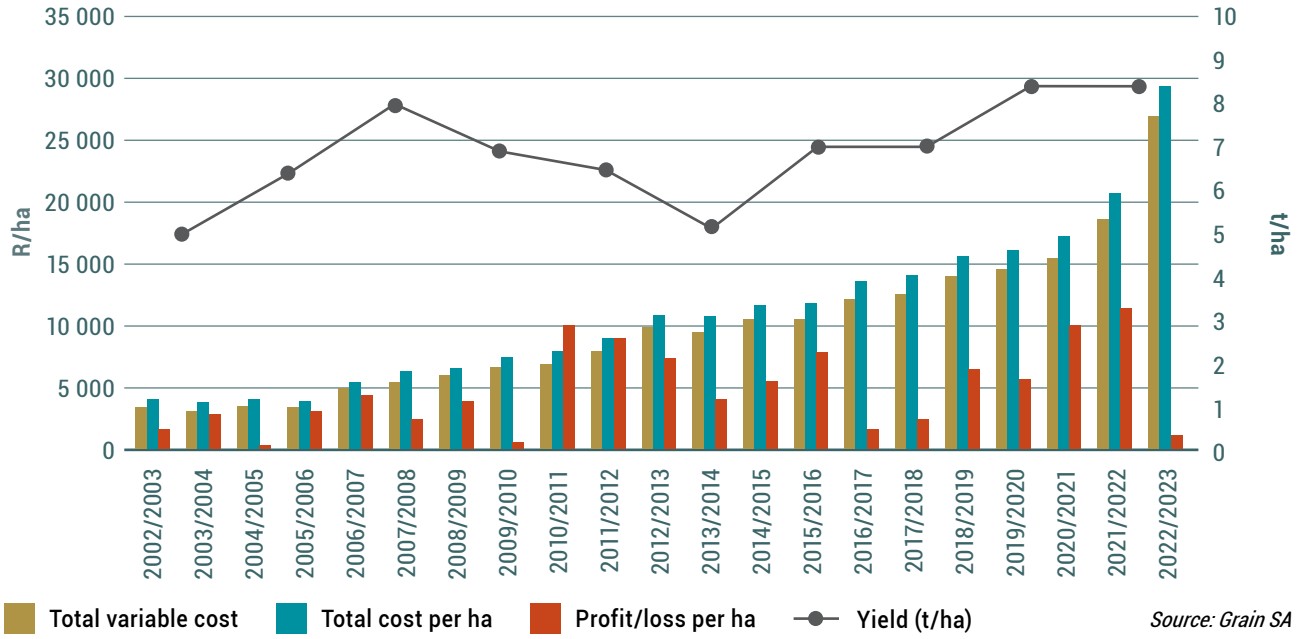
Source: Grain SA

Figure 2.3: Actual production cost, yield and profit/loss of maize for the Eastern Free State.



Source: Grain SA

Figure 2.4: Actual production cost, yield and profit/loss of maize for the KwaZulu-Natal.



Source: Grain SA

3. Contribution of different variable input cost items to the total variable input cost of maize

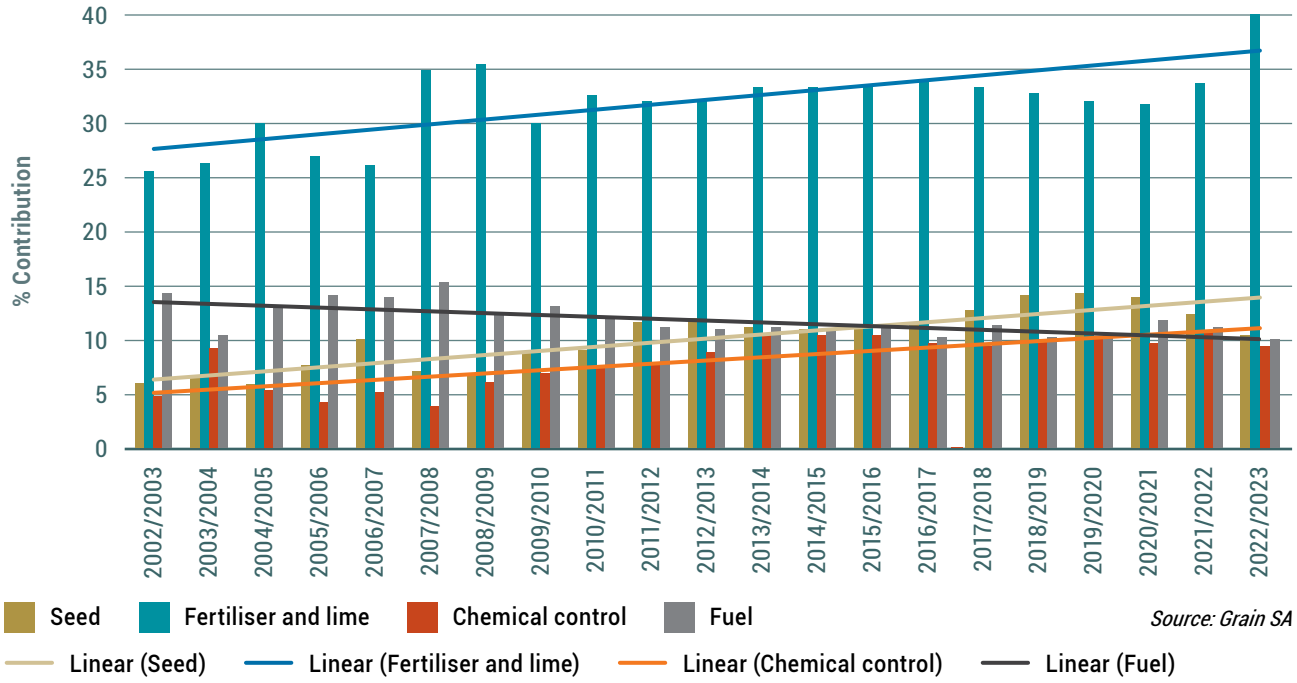
The purpose of this section is to provide the variable costs to produce maize and, specifically, to express different variable input cost items as a percentage of the total variable input costs as well as to express the cost increase of a specific variable cost over time per hectare.

3.1. NORTH WEST FREE STATE

Figure 3.1 shows the long-term average percentage contribution of selected variable input costs for maize in the North West Free State, while **Figure 3.2** and **Figure 3.3** shows the percentage contribution comparing two specific production seasons.

During these 20 years, the increasing trend in (%) terms, to a producer's total variable cost, of fertiliser and lime, maize seed, and chemical costs can be seen, while a decreasing trend is observed with fuel cost. Fertiliser and lime, which are the biggest contributing inputs for a maize producer, have contributed to the past few years between 30% and 35%.

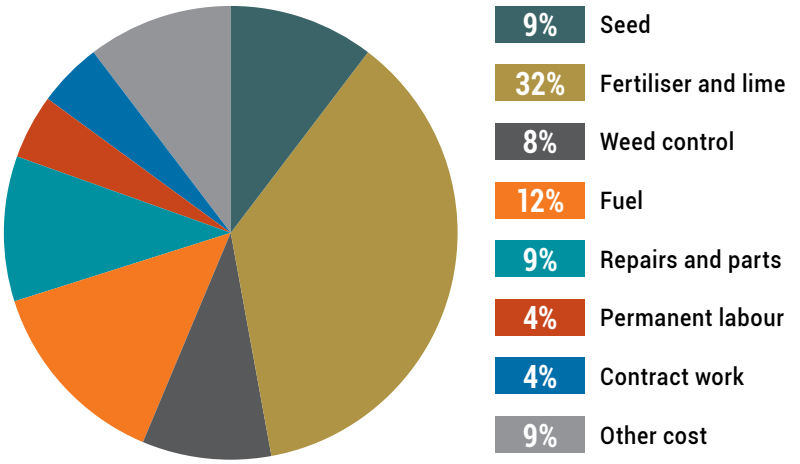
Figure 3.1: Contribution of seed as a variable input cost item to the total variable input cost as well as seed cost per hectare to produce maize for different production regions (2002/2003-2022/2023 production season).



Source: Grain SA

During the 2010/2011 production season, fertiliser and lime accounted for 32% of the total variable input cost. Fuel contributed 12%, while repairs and parts made up 9%. The cost of seed represented 9% of total variable costs compared to more recent seasons, and chemical control accounted for 8% of total variable input costs.

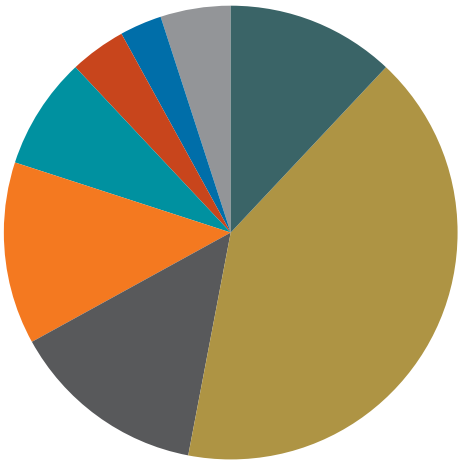
Figure 3.2: Contribution of different variable input cost items to the total variable input cost of maize for the North West Free State (2010/2011 production season).



Source: Grain SA

In the 2023/2024 production season, the share of fertiliser and lime had increased to 40% of the total variable input cost. Fuel maintained its 12% contribution, although the decrease in actual fuel usage reflects changes in production practices. Repairs and parts represent 8% of the total variable input cost. Both seed and chemical control costs increased in their relative contributions, with chemical control rising to 12% and 13% of the total variable input cost, respectively.

Figure 3.3: Contribution of different variable input cost items to the total variable input cost of maize for the North West Free State (2023/2024 production season).



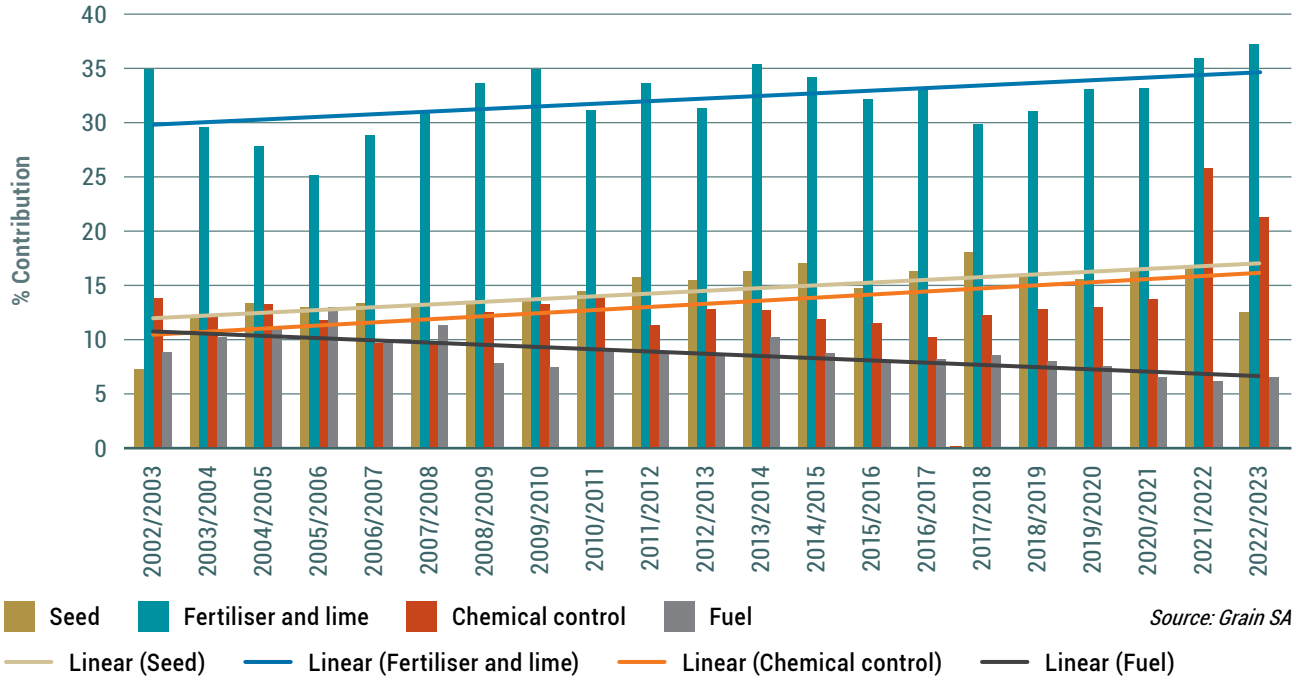
12% Seed
40% Fertiliser and lime
13% Weed control
12% Fuel
8% Repairs and parts
4% Permanent labour
3% Contract work
5% Other cost

Source: Grain SA

3.2. KWAZULU-NATAL (KZN)

Figure 3.4 shows the long-term average percentage contribution of the main variable input costs for maize in Kwazulu-Natal. Two separate years of data will be elaborated on and compared against each other (**Figure 3.5** and **3.6**).

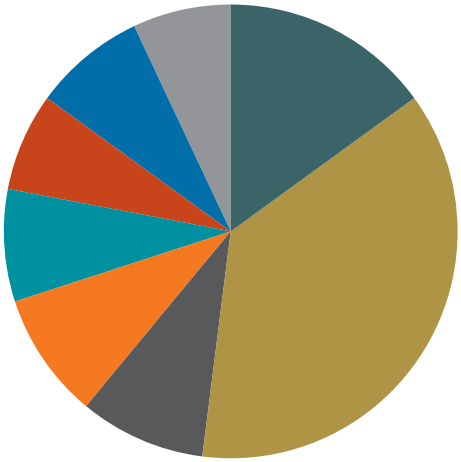
Figure 3.4: Contribution of different variable input cost items to the total variable input cost of maize for KwaZulu-Natal (2002/2003 to 2022/2023 production season).



Source: Grain SA

In the 2010/2011 production season, fertiliser and lime made up 35% of the total variable input cost. Repairs and parts accounted for 7% of total variable costs, while seed costs contributed a smaller share. Chemical control represented 8% of the total variable input cost during this season.

Figure 3.5: Contribution of different variable input cost items to the total variable input cost of maize for KwaZulu-Natal (2010/2011 production season).

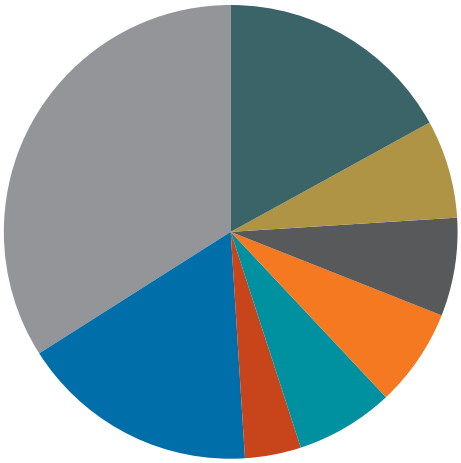


14% Seed
35% Fertiliser and lime
8% Weed control
8% Fuel
7% Repairs and parts
6% Permanent labour
7% Interest on production credit
6% Other cost

Source: Grain SA

In the 2023/2024 season, the share of fertiliser and lime had declined slightly to 34% of total variable input costs. Repairs and parts maintained their relative contribution at 7%. Seed costs increased by 3% compared to 2010/2011, reflecting higher investment in improved seed varieties. The cost of chemical control also rose, decreasing from 8% in 2010/2011 to 7% in 2023/2024 of the total variable input cost.

Figure 3.6: Contribution of different variable input cost items to the total variable input cost of maize for KwaZulu-Natal (2023/2024 production season).



17% Seed
7% Weed control
7% Fuel
7% Repairs and parts
7% Permanent labour
4% Interest on production credit
17% Other cost
34% Fertiliser and lime

Source: Grain SA

4. Budgeted income and production cost figures for maize (2023/2024 production season)

With the 2025/2026 season approaching, it is again time to make some calculations. The analysis of gross margins is a common and popular way of comparing the relative profitability of grains within a farm. This section provides a guideline in terms of the profitability of maize versus sunflower and soybeans. The responsibility still lies with each producer to do their gross margin calculations due to production costs radically differing from one farm to the next. This is differences are due to each grain producer's unique system, the type of farming unit, the production practices, etc.

4.1. KEY POINTS FOR THE 2024/2025 SEASON

4.1.1. Input pricing

Input prices had a moderate overall decrease throughout the past year. As of October, local fertiliser prices increase by an average of 10,75% year-on-year. This increase can be attributed to the strengthening of the rand throughout the year. Fuel prices experienced a consistent decrease from October 2024 to October 2025.

International herbicide prices decreased by an average of 17,62% year-on-year for the month of October, insecticide prices decreased by -0,78%, and fungicides by 20,39%.

It's worth noting that the rate of decrease has slowed down, leading to smaller average month-to-month price declines. The appreciation of the rand against the dollar over the course of a year affects local prices, causing them not to decrease as much in dollar terms. As a result, international price decreases have not been experienced yet in the local market.

4.1.2. Commodity prices

Throughout 2024/2025 there was a divergence between white and yellow maize prices, with yellow maize prices increasing more slowly than white maize. White maize production was lower than expected due to drought and other factors, leading to higher prices due to limited availability. In contrast, yellow maize production was more in line with demand, resulting in relatively stable prices.

4.1.3. Weather predictions

The status of the El Niño–Southern Oscillation (ENSO) is active. This will likely be a weak-strength and short-lived ENSO event. La Niña conditions are expected to develop during October to December 2025 (53% to 58% chance, according to the NOAA CPC/IRI).

5. Compilation of budgets

Establishing production budgets before planting crops is becoming increasingly necessary and should not be taken lightly when making production decisions. No one can accurately predict the future with all its risks and uncertainties; the budgets are compiled based on some forecasts, historical data, assumptions, and experience. Considering this, producers, as budget users, should be aware that budgets, as well as the assumptions on which they are based, are subject to constant change.

The cost structure of the budgets consists of variable and fixed costs. If you do not make use of certain variable costs, you can deduct them from the total variable costs. Although fixed costs vary dramatically from producer to producer, a placeholder amount is provided to calculate an estimated total production cost.

Forecasting the commodity price for the coming year is extremely difficult. The SAFEX future contract prices used in the calculations are as follows:

- Maize for delivery in July 2025 = R4 200/ton
- Sunflower for delivery in May 2025 = R9 600/ton
- Soybeans for delivery in May 2025 = R7 400/ton

The 2025 futures prices were determined by using the spot price of that particular contract month. Based on the location differential, handling costs and marketing commission, a producer price was calculated.

5.1. YIELD

A difficult determining factor when compiling budgets is determining the yield of the crop for the upcoming year due to the uncertainty of climatic conditions. When comparing the profitability of different crops, it's important to consider which yield scenarios should be used for each crop. For instance, if you were to harvest an average yield of 4 t/ha for maize, what would be the equivalent yield for sunflower or soybeans in the same climate and soil? Agronomists and industry specialists were consulted to determine the comparative yield scenarios for different crops.

5.2. INPUT PRICES

5.2.1. Seed

Recently, seed prices have seen significant increases across various crops. Specifically, maize seed prices have risen by 2,3%, while soybean seeds have increased by 6,9%. Sunflower seed prices have climbed 4,3%, and sorghum seeds have experienced a 6,2% increase.

These rising costs pose substantial challenges for producers, as they directly impact their overall production expenses. For instance, maize seed prices for the 2025/2026 production season rose by 2,3% on average. Sunflower seed prices rose by 4,26% on average, sorghum seed prices by 6,.2% and soybean seed prices increased by 6,9%.

Given the already tight profit margins in agriculture, these increases in seed prices can squeeze producers' budgets further, potentially affecting their planting decisions and overall agricultural productivity.

5.2.2. Fertiliser

From September 2024 to September 2025, international fertiliser prices have increased across the board. Only Ammonia saw a decrease of almost 25%.

Different assumptions are made in compiling the budgets. In the case of fertiliser (which represents the largest portion of a producer's variable costs), the budget incorporated an average of the price lists for N, P, and K from all fertiliser companies.

5.2.3. Fuel

When calculating fuel costs, forecasts are determined using future rand/dollar exchange rates and future crude oil prices. The factors that influence the local fuel price movements are Brent crude oil prices and the rand/dollar exchange rate, as well as local fuel levies.

Graph 5 (on page 39) shows the international Brent crude oil prices and the Gauteng wholesale prices of diesel over time. Over a year, Brent crude oil prices were $72,93 per barrel in September 2024 to $67,34 per barrel in September 2025, lower oil demand in China and announcements that OPEC+ were expecting to increase production contributed to prices decrease. Over the same period, the rand strengthened against the dollar from R17,58 to R17,46.

5.2.4. Chemical

The increase in chemical products varies depending on whether it is an herbicide, an insecticide or a pesticide. From data received from various local companies, agrochemical prices have decreased in the past year.

The estimated increase will vary between different producers and across various regions, due to each producer making different purchases, different production practices and many more. We know that producers are price takers, that these higher input costs cannot be passed on to consumers and that producers must absorb price increases.

5.3. THE COST STRUCTURE OF BUDGETS

The cost structure of the budget is composed of variable and fixed costs. In the budgets, variable costs are, for example, seed, fertiliser, herbicide, diesel, etc. These costs differ as more or less of the input is used. The fixed or overhead costs are expenses incurred regardless of the level of production or output volumes. While fixed costs vary significantly among producers, a specific amount is allocated for estimating total production costs. These fixed costs must be added to the variable cost per hectare to determine the overall production cost.

> We know that producers are price takers, that these higher input costs cannot be passed on to consumers and that producers must absorb price increases.

6. COMMERCIAL BUDGETS[1]

6.1. MONTHLY PROFITABILITY CALCULATIONS FOR THE 2024/2025 SEASON

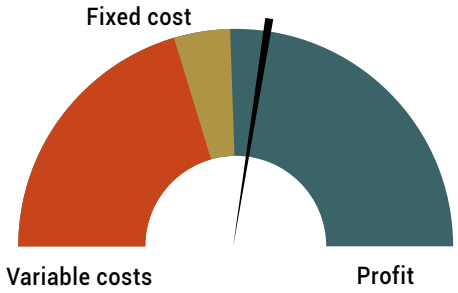
Due to input costs constantly increasing, Grain SA has monitored the profitability situation of grain and oilseeds every month since June 2024. As new information emerges every month, whether it is input costs such as fertiliser or fuel prices or the SAFEX price, the profitability situation for the upcoming summer grain season was estimated to give producers and the industry an idea of grain and oilseed profitability.

Fertiliser prices, with their current downward pressure, are very positive for producers. Fuel prices have decreased in the past few months, but this trend was halted with the expected price hike in November 2024. As South Africa imports a large part of its fuel, its producers are exposed to international markets.

6.1.1. Western parts of the country

Figure 6.1 shows the estimated total variable costs monthly for the North West province, with the first scenario compiled in the 2024/2025 production season to estimate production cost figures for the 2025/2026 production season, as compiled with input costs as available in August 2025.

Figure 6.1: Western Region: Profitability gauge 2025.



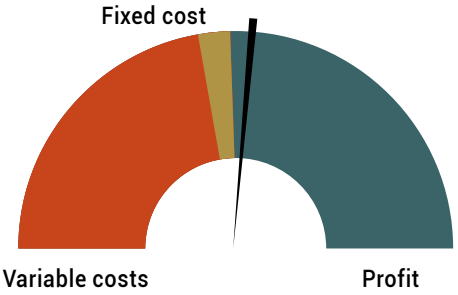
For the 2025/2026 production season

- Yield target: 5t/ha
- SAFEX price (July 2025): R4 455/t
- Average deductions: R418/t
- Total variable costs: R17 710,95/ha
- Total fixed cost: R2 652,91/ha
- Net margin (R/ha): R2 821/ha

6.1.2. Eastern parts of the country

Figure 6.2 shows the estimated total variable costs monthly for Mpumalanga, with the first scenario compiled in the 2023/2024 production season to estimated production cost figures for the 2024/2025 production season, as compiled with input costs as available in August 2024.

Figure 6.2: Eastern Region: Profitability gauge of 2025.



For the 2025/2026 production season

- Yield target: 6,5 t/ha
- SAFEX price (July 2025): R4 200/t
- Average deductions: R442/t
- Total variable costs: R20 683,10/ha
- Total fixed cost: R1 817,73/ha
- Net margin (R/ha): R1 926,20/ha

6.2. PROFITABILITY CALCULATION FOR THE 2025/2026

Grain SA is in the process of finalising the budgets for the 2025/2026 season. An illustration of the maize budgets and their performance against other crops is shown in **Tables 6.1** to **6.4**. The yield scenarios were based on assumptions for production conditions in different regions. These tables are compiled to indicate the difference in profitability between the various summer crops, but it is important to note that these figures may vary from one producer to the next.

[1] *Disclaimer: The information herein 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.*

6.2.1. Western parts of the country

An example of the maize budgets and their performance against other crops is shown in Table 6.1. The yield scenarios were based on assumptions for production conditions in the Western Part of the country (North West province and North West Central Free State). This table was compiled to indicate the difference in profitability between the various summer crops (maize, sunflower, soybeans). It's important to understand that these figures can differ depending on the producer.

While Table 6.1 shows estimated production costs for the North West province and North West Central Free State. Figure 6.3 (on page 54) illustrates the gross- and net margin situation.

The key fact is that sunflower (on paper) remains a stalwart crop for the North West province, although the occurrence of diseases (specifically Sclerotinia) on sunflowers has been affecting yields in the last few seasons. According to calculations, should the SAFEX prices materialise, summer grain production in the western parts of the country generally seems to be relatively profitable, excluding maize that is planted on marginal yield potential soils when total input costs (fixed costs plus variable costs) are taken into consideration.

Table 6.1: North West production cost budgets for summer grain for the 2025/2026 season.

Crop	Maize (Bt)	Sun-flower	Soybean	Ground-nuts	Maize (irrigation)
1) INCOME					
Yield target (t/ha)	5	1,25	1,75	1,20	11
SAFEX price: Best grade	R4 455	R9 600	R7 400	R14 275	R4 455
Deductions	R418	R429	R189	R63	R418
Net farm gate price	R4 037	R9 171	R7 211	R14 212	R4 037
GROSS INCOME (R/ha)	**R20 185**	**R11 464**	**R12 619**	**R17 055**	**R44 407**
2) VARIABLE EXPENDITURES					
Seed	R2 046,59	R806,63	R1 269,60	R1 760,50	R4 618,75
Fertiliser	R3 838,94	R1 331,10	R2 351,60	R1 324,10	R12 503
Lime	R760	R760	R760	R760	R760
Fuel	R1 533,11	R1 312,89	R1 047,41	R1 481,94	R1 308,38
Reparation	R1 469,16	R1 052,53	R1 412,29	R1 815,24	R1 254,65
Crop protection	R2 032,44	R1 112,34	R2 880,56	R2 151,51	R1 852,17
Input insurance	R726,66	R223,54	R246,14	-	-
Irrigation cost					R7 803,40
Grain hedging	R1 028,11	R201,03	R601,76	-	R2 594,49
Contract harvesting	-	-	-	-	-
Harvest insurance	R422	R229,28	R883,59	R224,65	R1 109,27
Aerial spray	-	-	-	-	-
Casual labour	-	-	-	R1 050	-
Drying cost	-	-	-	-	-
Packaging and packaging material	-	-	-	R247	-
Interest on production (R/ha)	R853,96	R448,12	R730,13	R640,72	R2 155,01
TOTAL VARIABLE EXPENDITURE (R/ha)	**R14 710,95**	**R7 477,46**	**R12 183,08**	**R11 455,65**	**R35 959,11**
TOTAL FIXED COST (R/ha)	**R2 652,91**	**R2 282,30**	**R1 755,08**	**R2 541,85**	**R3 582,62**
TOTAL COST (R/ha)	**R17 363,86**	**R9 759,76**	**R13 938,16**	**R13 997,50**	**R39 541,73**
3) GROSS MARGIN (R/ha)	**R5 474**	**R3 986**	**R436**	**R5 599**	**R8 448**
4) NET MARGIN (R/ha)	**R2 821**	**R1 704**	**-R1 319**	**R3 057**	**R4 865**

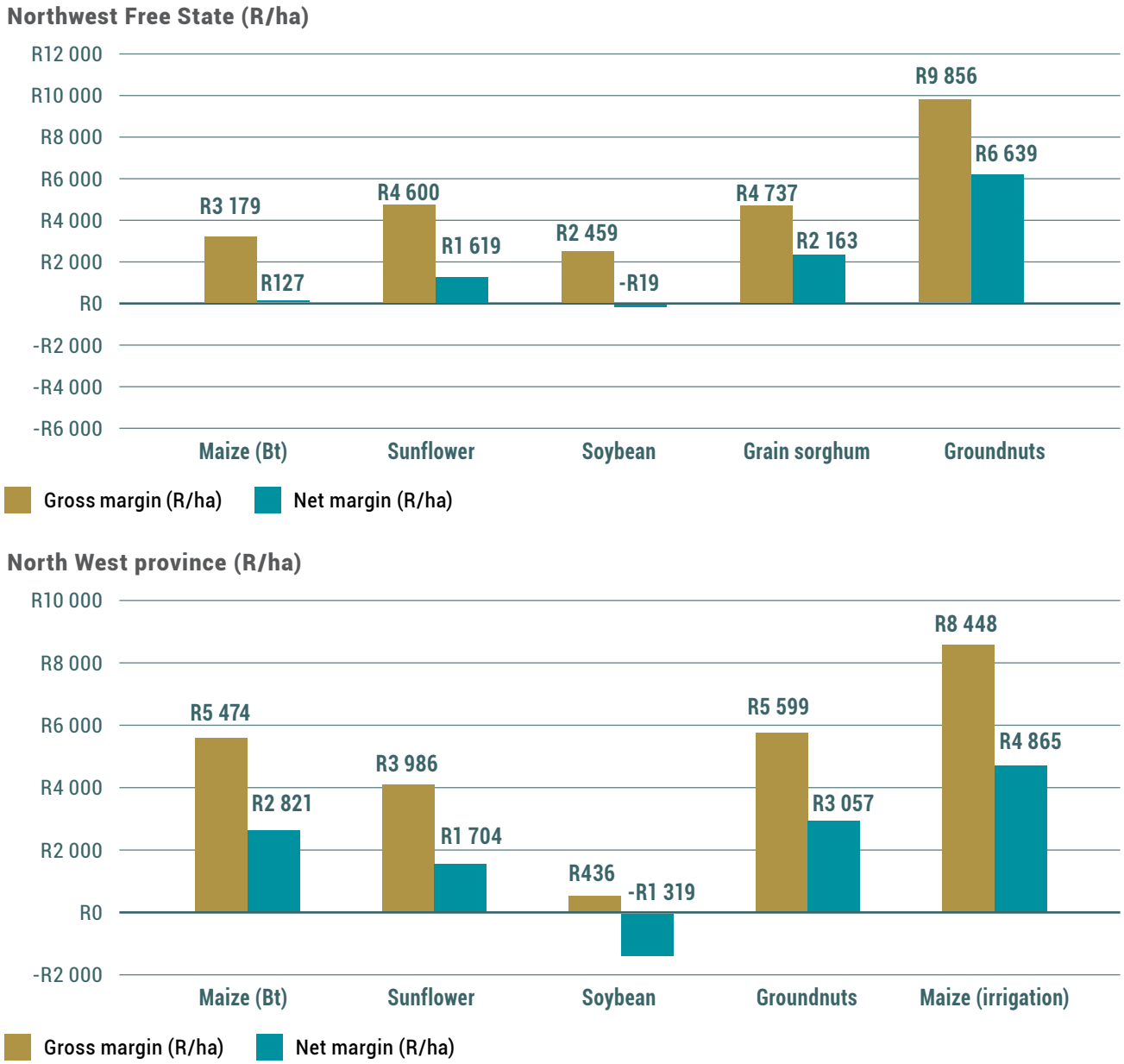
Source: Grain SA

Table 6.2: North West Free State production cost budgets for summer grain for the 2025/2026 season.

Crop	Maize (Bt)	Sun-flower	Soybean	Grain sorghum	Ground-nuts
1) INCOME					
Yield target (ton/ha)	4,50	1,75	2,25	3	1,50
SAFEX: Estimated price	R4 455	R9 600	R7 400	R4 993	R14 695
Deductions	R420	R724	R218	R63	R63
Net farm gate price	R4 035	R8 876	R7 182	R4 930	R14 632
GROSS INCOME (R/ha)	**R18 158**	**R15 533**	**R16 160**	**R14 790**	**R21 948**
2) VARIABLE EXPENDITURES					
Seed	R2 186,13	R816,24	R1 759,91	R550	R1 760,50
Fertiliser	R5 168,80	R1 955,60	R3 160,60	R3 579	R2 166
Lime	R760	R760	R760	R179,49	R760
Fuel	R1 402,06	R1 389,55	R1 171,61	R1 625,17	R1 502,97
Reparation	R1 368,68	R1 440,66	R1 222,86	R778,43	R1 775,45
Crop protection	R1 230,76	R2 610,84	R2 880,56	R1 199,15	R2 111
Pest control	-	-		R789,26	
Input insurance	R355,91	R302,89	R308,49	R364,86	-
Irrigation cost					
Grain hedging	R1 074,13	R303,42	R191,82	-	-
Contract harvesting	-	-	-	-	-
Harvest insurance	R534,23	R698,99	R1 423,78	R429,97	-
Aerial spray	-	-	-	-	-
Casual labour	-	-	-	-	R1 100
Drying cost	-	-	-	-	-
Packaging and packaging material	-	-	-	-	R350
Interest on production (R/ha)	R897,65	R655,23	R821,08	R557,85	R566,39
TOTAL VARIABLE EXPENDITURE (R/ha)	**R14 978,35**	**R10 933,43**	**R13 700,70**	**R10 053,19**	**R12 092,30**
TOTAL FIXED COST (R/ha)	**R3 052,36**	**R2 980,94**	**R2 477,47**	**R2 574,20**	**R3 216,45**
TOTAL COST (R/ha)	**R18 030,71**	**R13 914,37**	**R16 178,17**	**R12 627,39**	**R15 308,75**
3) GROSS MARGIN (R/ha)	**R3 179**	**R4 600**	**R2 459**	**R4 737**	**R9 856**
4) NET MARGIN (R/ha)	**R127**	**R1 619**	**-R19**	**R2 163**	**R6 639**

Source: Grain SA

Figure 6.3: Margin comparison for summer grain crops in the Northwest Free State and the North West province for the 2025/2026 season.



6.2.2. Eastern regions of the country

Table 6.3 (on page 55) outlines the production costs for maize, sunflowers and soybeans in the Eastern Free State, comparing different yield targets for the 2025/2026 production season. According to the cost estimates, the variable cost of producing maize in this region for a 6 t/ha yield target is approximately R17 610,58/ha. In terms of soybeans and sunflowers, it further illustrates that, given the fixed and variable cost structure and current SAFEX prices, a soybean yield of approximately 1,8 t/ha is required to reach break-even levels.

Table 6.3: Budgets for the Eastern Free State.

Crop	Maize (Bt)	Sunflower	Soybean
1) INCOME			
Yield target (t/ha)	5	1,20	11
SAFEX: Estimated price	R4 455	R14 275	R4 455
Deductions	R418	R63	R418
Net farm gate price	R4 037	R14 212	R4 037
GROSS INCOME (R/ha)	**R20 185**	**R17 055**	**R44 407**
2) VARIABLE EXPENDITURES			
Seed	R3 348,97	R720,21	R2 110,99
Fertiliser	R6 436,51	R1 925,19	R2 240,27
Lime	R760	-	-
Fuel	R934,17	R832,63	R940,50
Reparation	R1 042,89	R1 156,93	R1 265,38
Crop protection	R966,47	R1 177,92	R1 015,16
Input insurance	R449,40	R249,42	R404,16
Grain hedging	R1 289,43	R197,36	R138,16
Harvest insurance	R845,73	R481,16	R1 064,25
Interest on production (R/ha)	R1 537,03	R429,73	R585,14
TOTAL VARIABLE EXPENDITURE (R/ha)	**R17 610,58**	**R7 170,54**	**R9 764,01**
TOTAL FIXED COST (R/ha)	**R1 839,63**	**R1 762,28**	**R1 956,02**
TOTAL COST (R/ha)	**R19 450,21**	**R8 932,82**	**R11 720,03**
3) GROSS MARGIN (R/ha)	**R5 315**	**R4 351**	**R3 234**
4) NET MARGIN (R/ha)	**R3 476**	**R2 588**	**R1 278**

Source: Grain SA

Table 6.4 (on page 56) presents the production costs for maize and soybeans in the Eastern Highveld. The variable cost of producing maize for a 6,5 t/ha yield target is estimated at around R20 683,10/ha. For soybeans, the table shows that a yield of about 2 t/ha is needed to break even at the given SAFEX price and total input cost levels.

Table 6.4: Budgets for the Eastern Highveld.

Crop	Maize (RR)	Maize (min tillage)	Soybean (conventional)
1) INCOME			
Yield target (t/ha)	6,50	6	2
SAFEX: Estimated price	R4 200	R4 200	R7 400
Deductions	R442	R442	R212
Net farm gate price	R3 758	R3 758	R7 188
GROSS INCOME (R/ha)	**R24 427**	**R22 548**	**R14 376**
2) VARIABLE EXPENDITURES			
Seed	R4 389	R3 761,41	R2 113,78
Fertiliser	R7 238,40	R6 426,90	R4 165,69
Lime	R759	R252,75	R759
Fuel	R961,97	R1 273,28	R1 153,23
Reparation	R1 222,19	R695,88	R1 400,20
Crop protection	R1 996,13	R1 392,72	R1 226,05
Input insurance	R512,97	R438,17	R280,33
Grain hedging	R1 365,75	R1 147,49	R179,01
Harvest insurance	R998,17	R895,24	R1 006,32
Interest on production (R/ha)	R1 239,53	R1 038,10	R783,08
TOTAL VARIABLE EXPENDITURE (R/ha)	**R20 683,10**	**R17 321,92**	**R13 066,69**
TOTAL FIXED COST (R/ha)	**R1 817,73**	**R2 217,07**	**R2 149,16**
TOTAL COST (R/ha)	**R22 500,83**	**R19 538,99**	**R15 215,85**
3) GROSS MARGIN (R/ha)	**R3 744**	**R5 226**	**R1 309**
4) NET MARGIN (R/ha)	**R1 926,2**	**R3 009**	**-R840**

Source: Grain SA

Figure 6.4 (on page 57) provides a visual summary of the data presented in Tables 6.3 and 6.4. It compares the gross margin (golden bars, representing variable costs only) and the net margin (turquoise bars, representing both variable and fixed costs) across the different crops.

Overall, the figure indicates that summer grain production in the eastern regions of the country remains largely profitable, except for soybeans in the Eastern Highveld Region. The anticipated higher commodity prices for the upcoming season are expected to further support returns. The figure also highlights that maize, soybeans and sunflowers show stronger profitability in the Eastern Free State Regions. When looking at the Eastern Highveld, grain sorghum and maize are more profitable.

6.2.3. Irrigation

There is a significant difference when the cost per hectare between dry land and irrigation is compared. The difference in variable cost is mainly due to the higher plant density under irrigation increasing both seed and fertiliser costs. Except for the price increases in input costs, an irrigation producer is suffering under the constant increase in the cost of, for example, electricity, water and pivot maintenance.

Table 6.5 and **6.6** (on page 58 and 59) show the estimated production costs for irrigation crops for the Northern Cape and Limpopo for the 2024/2025 production season. If the SAFEX price and the estimated budgeted input costs are realised, it appears that an irrigation producer would be able to cover their variable costs when planting maize and sunflowers, but the picture looks quite different if the fixed cost component is considered.

Figure 6.4: Margin comparison for summer grain crops in the Eastern Free State and Eastern Highveld for the 2023/2024 season.

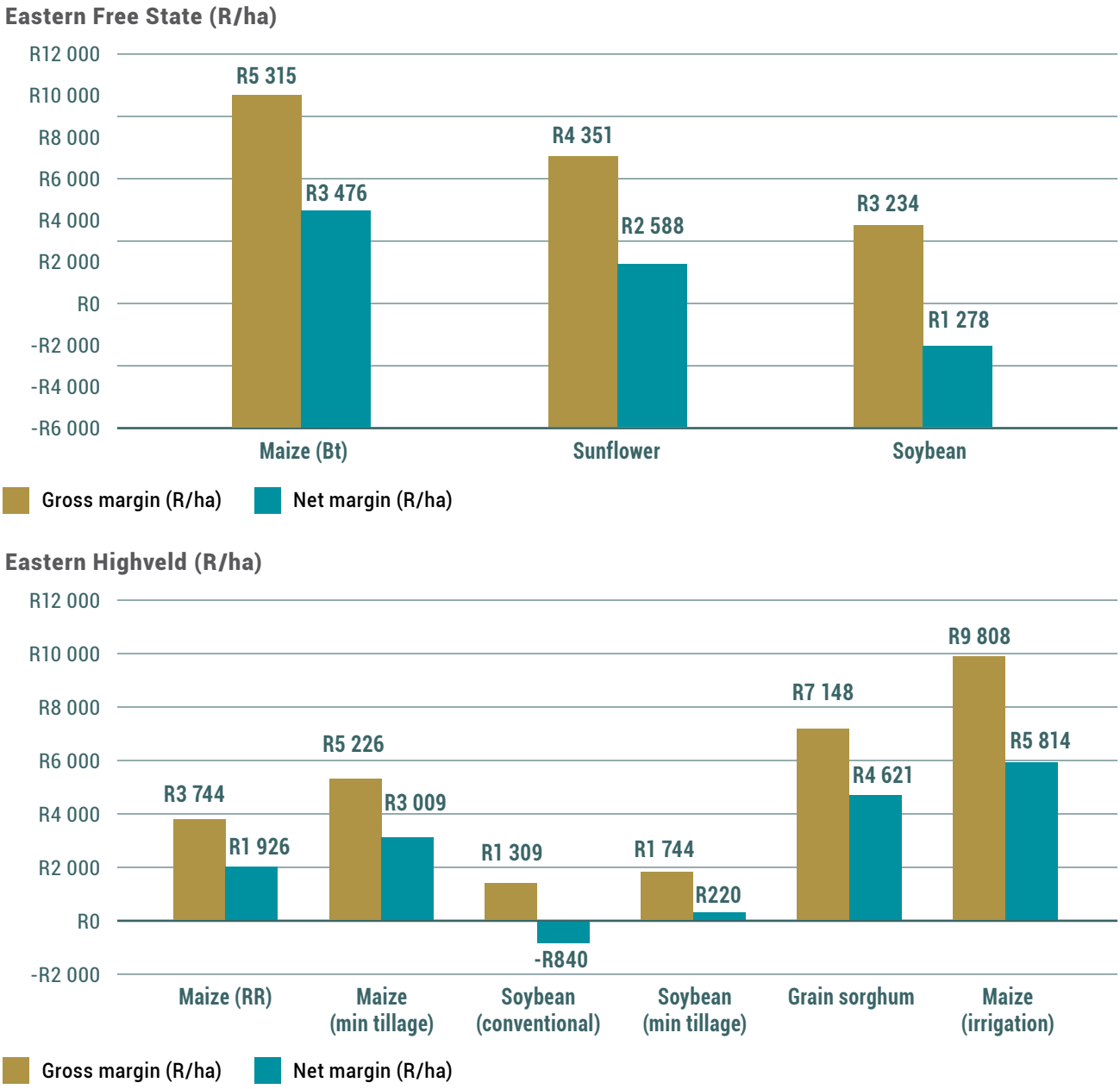


Figure 6.5 (on page 58) provides a visual summary of the data presented in Tables 6.5 and 6.6. It compares the gross margin (golden bars, representing variable costs only) and the net margin (turquoise bars, representing both variable and fixed costs) across the different crops. Overall, the figure indicates that summer grain production under irrigation in Limpopo and Northern Cape is profitable, except for soybeans. The figure also highlights that sorghum production in Limpopo and maize production in the Northern Cape is more profitable.

Table 6.5: Limpopo irrigation budget.

Crop	Maize (irrigation)	Soybean (irrigation)	Sorghum (irrigation)	Sunflower (irrigation)
1) INCOME				
Yield target (t/ha)	6,50	3	7	2
SAFEX: Estimated price	R4 200	R7 400	R4 993	R9 600
Deductions	R442	R63	R63	R375
Net farm gate price	R3 758	R7 337	R4 930	R9 225
GROSS INCOME (R/ha)	**R24 427**	**R22 011**	**R34 510**	**R18 450**
2) VARIABLE EXPENDITURES				
Seed	R5 390	R 3 621,94	R1 008	R1 152,33
Fertiliser	R11 626,20	R 3 283,30	R6 781,95	R2 332,60
Fuel	R 1 670,88	R1 526,40	R1 618,98	R1 515,98
Reparation	R1 333,73	R1 058,62	R601,41	R1 100,13
Herbicide	R774,70	R 553,86	R1 020,82	R1 103,86
Pest control	R1 064	R347,25	R214,47	R32,40
Irrigation cost	R9 087	R6 051	R5 655	R2 025
Grain hedging	R 2 502,68	R271,05	-	R295,76
Contract harvesting	R850	R850	R850	R400
Harvest insurance	R1 537,55	R1 210,61	R860,13	R442,80
Aerial spray	R85	R200	R320	-
Interest on production (R/ha)	R 2 235,82	R1 155,41	R1 152,65	R637,55
TOTAL VARIABLE EXPENDITURE (R/ha)	**R38 157,57**	**R20 129,43**	**R20 083,40**	**R11 038,41**
TOTAL FIXED COST (R/ha)	**R6 367,26**	**R5 870,40**	**R7 215,57**	**R6 918,01**
TOTAL COST (R/ha)	**R44 524,83**	**R25 999,83**	**R27 298,97**	**R17 956,42**
3) GROSS MARGIN (R/ha)	**R7 334**	**R1 882**	**R14 427**	**R7 412**
4) NET MARGIN (R/ha)	**R967**	**-R3 989**	**R7 211**	**R494**

Source: Grain SA

Figure 6.5: Margin comparison for summer grain crops in the Northern Cape and Limpopo for irrigation for the 2025/2026 season.

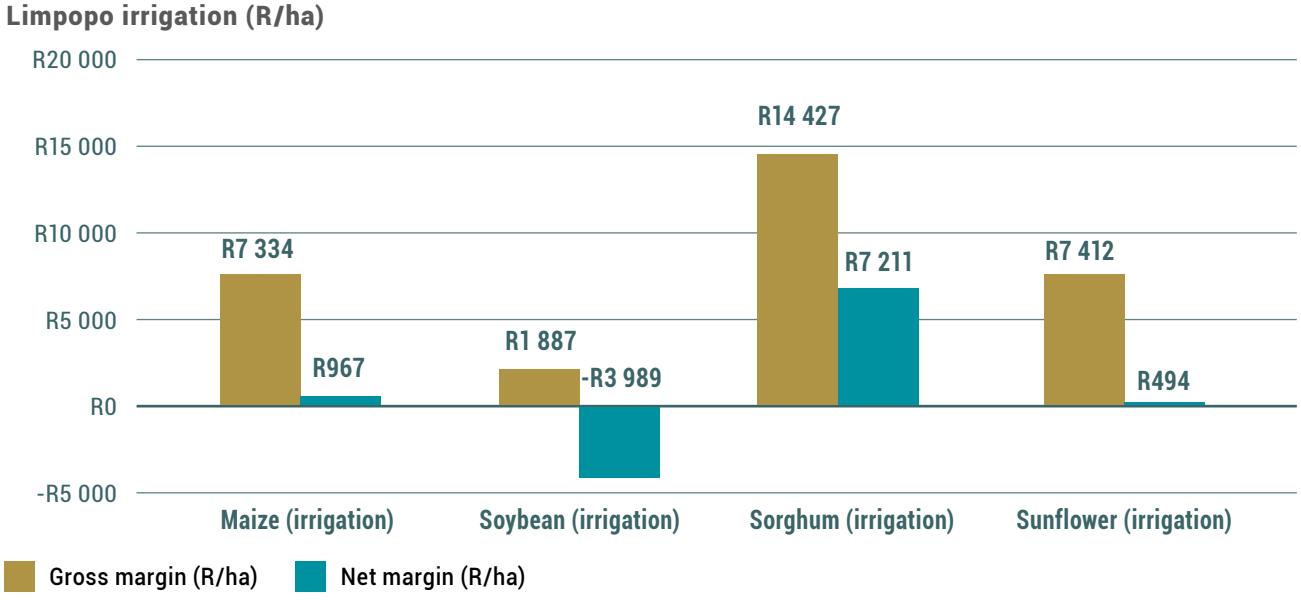
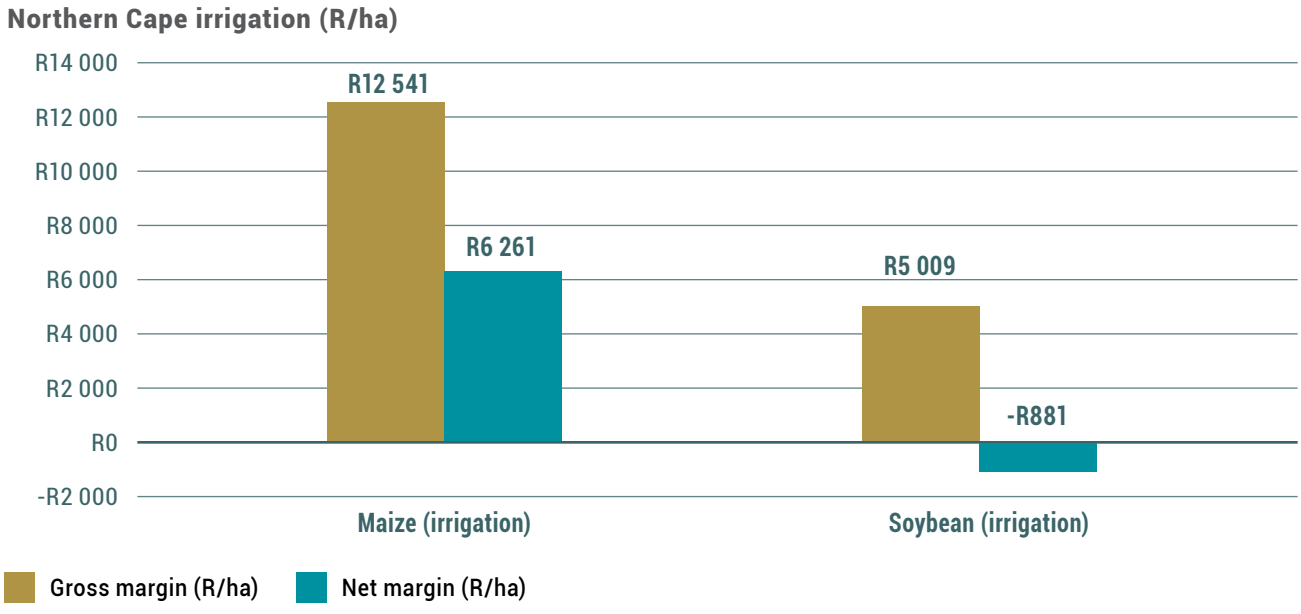


Table 6.6: Northern Cape irrigation budget.

Crop	Irrigation maize	Irrigation soybean
1) INCOME		
Yield target (ton/ha)	15	4,50
SAFEX: Estimated price	R4 200	R7 400
Deductions	R601	R204
Net farm gate price	R3 599	R7 196
GROSS INCOME (R/ha)	**R53 985**	**R32 382**
2) VARIABLE EXPENDITURES		
Seed	R7 747,49	R2 809,34
Fertiliser	R16 692,65	R8 947,20
Fuel	R1 398,04	R835,51
Reparation	R1 101,35	R526,78
Herbicide	R1 183,55	R631,65
Pest control	-	R1 950,86
Irrigation cost	R7 453,84	R6 849,40
Contract harvesting	R 1 100,00	R1 250
Harvest insurance	R1 066,20	R1 727,04
Aerial spray	R500	-
Interest on production (R/ha)	R2 440,39	R1 845
TOTAL VARIABLE EXPENDITURE (R/ha)	**R41 443,51**	**R27 372,79**
TOTAL FIXED COST (R/ha)	**R6 280,73**	**R5 890**
TOTAL COST (R/ha)	**R47 724,24**	**R33 262,79**
3) GROSS MARGIN (R/ha)	**R12 541**	**R5 009**
4) NET MARGIN (R/ha)	**R6 261**	**-R881**

Source: Grain SA



GRAIN SA MEMBER SERVICES

Research, innovation and capacity development

MOMENTUM GAINED WITH CROP IMPROVEMENT, PLANT HEALTH AND CLIMATE RESILIENCE

The Grain SA research coordination department focuses on three key areas of research: crop improvement, plant health and climate resilience. The primary aim is to create research consortia that promote innovation, enhancing the productivity, profitability and sustainability of South African grain and oilseed producers. To support this aim, the department has a focus area committed to developing human capital by training students and hiring technicians, particularly in critical fields such as breeding, agronomy, plant pathology, and nematology.

At the heart of this work is a clear value proposition. The department helps protect crops and secure yields by coordinating high-impact research on pest, disease and weed management. It also works to strengthen market access through developing robust biosecurity systems that support trade. To improve profitability, the team seeks to ensure that producers have access to high-performing crop varieties, precision farming tools, soil health innovations and climate-smart strategies. The department also champions producers' interests by engaging in policy discussions on climate change, plant health and biotechnology regulations. Finally, it is committed to expanding and developing effective mechanisms for accessing and using grain research information, ensuring that valuable knowledge reaches those who need it.

A cornerstone of the Grain SA success in coordinating research is the strong partnerships it has established with various partners and funders over the years. A key and well-established partnership is with the Department of Science, Technology and Innovation (DSTI), and the Technology Innovation Agency (TIA), through the Strategic Innovation Partnership for Grain and Oilseeds under the Agricultural Bio-economy Innovation Partnership Programme (ABIPP). This partnership has seen significant contributions from the DSTI, TIA and Grain SA. Furthermore, collaboration with industry co-funders, including the Maize Trust, Oil and Protein Seeds Development Trust, Sasol Trust, and the South African Winter Cereals Industry Agency, has been instrumental in supporting research that adds tangible value to grain and oilseed producers.

Producer engagements

REGIONAL RESEARCH ROADSHOWS

Grain SA's 2025 Western Cape Research Roadshow, held in Moorreesburg and Rietpoel with support from John Deere Financial and Absa, brought together farmers, researchers and stakeholders to share research insights and engage directly on challenges facing the grain industry.

The programme covered a wide range of topics including data-driven farming through the Data-Intensive Farm Management (DIFM) project, advances in plant breeding at Stellenbosch University (SU), plant disease diagnostics, herbicide-resistant ryegrass management, slug infestations, conservation agriculture, predictive climate tools like TerraClim, new Pest Control Operator regulations, and global wheat market trends. Presentations highlighted practical solutions such as precision input use, integrated weed and pest management, biosecurity, predictive intelligence, and conservation practices that improve resilience, profitability, and sustainability.

This roadshow underscored the importance of aligning research with farmer needs, fostering collaboration, and combining science with farmer experience to strengthen South Africa's grain industry and ensure its competitiveness into the future.




RESEARCH ROAD SHOWS IN THE WESTERN CAPE.

ON-FARM RESEARCH VISITS

Grain SA's research team remains committed to farmer-led innovation through regular on-farm visits and collaborative trials. These visits, typically conducted once or twice per quarter, offer a vital platform to engage directly with producers, understand their challenges, and align research efforts with real-world needs. For instance, a visit to Viljoenskroon highlighted the value of conservation agriculture trials led by farmers, where sustainable practices are tested under local conditions to ensure both economic and environmental viability.

Joining the team on one of the farm visit this year, to discuss pressing issues such as rising input costs, climate variability, and job creation potential in agriculture, were various stakeholders from the Agricultural Research Council (ARC), the Free State Department of Agriculture, and the MEC for agriculture in the Free State.

A farm visit in Mpumalanga focused on biological applications and the effect of spray nozzles on the efficiency of sprayer applications. These on-farm engagements not only strengthen the link between research and practice but also inform the development of a national agricultural research agenda and assist with internal research prioritisation.





RESEARCH TEAM VISITS VARIOUS FARMS ACROSS SOUTH AFRICA.

FARMERS' EMPOWERMENT DAYS AND IMBIZOS

Grain SA's Phahama Grain Phakama (PGP) Imbizo and information sessions in Lichtenburg, Bethlehem, Welkom and Ermelo brought farmers and stakeholders together under the theme "Vukuzenzele: Farmers driving change." The events encouraged farmers to take initiative, ask questions, and shape the future of their farms.

The Grain SA Research team delivered a presentation on pest, disease, and weed management, helping producers deepen their understanding of plant health challenges in grain crops. Farmers were introduced to the Diagnostic Clinic and encouraged to reach out for support when facing plant health issues.

The sessions were so well received that farmers requested more, highlighting the value of expert engagement and tailored advice. Additional presentations covered climate smart practices, seasonal forecasting, and proactive crop management strategies. Each discussion reinforced the spirit of 'Vukuzenzele' – real progress begins when farmers lead the way.

Scientific community engagement

RESEARCH AND POLICY CONFERENCES

During the past year, Grain SA's research team actively engaged in several national and international platforms to strengthen collaboration and knowledge exchange across the agricultural science community.

Highlights included sponsoring and participating in the inaugural International Conference for Pantoea Research at Kruger National Park, which advanced global dialogue on plant health and biosecurity. The team also contributed to the Soilborne Plant Diseases Symposium hosted by ARC-PHP, where discussions on soil health indicators and microbial diversity informed future approaches to sustainable grain production.

Further reinforcing Grain SA's strategic influence, the team participated in the G20 National Dialogue on Agricultural Science (MACS-G20), shaping South Africa's priorities for global agricultural policy and research collaboration. The research team also presented at Science Forum South Africa 2024, highlighting the importance of professionalised extension services and climate-smart agriculture. The annual National Grain Research Programme (NGRP) meeting, co-hosted by North-West University (NWU) and the ARC, provided a platform for innovation and capacity building under the theme 'Farming 2.0: Smarter & Greener'.

Finally, the team contributed to the Science-Policy Dialogue on Agricultural Greenhouse Gas Research Priorities in Southern Africa, ensuring that farmer-centred research remains aligned with climate and sustainability goals.






THE RESEARCH TEAM ATTENDED VARIOUS CONFERENCES THIS PAST YEAR.

INSTITUTIONAL VISITS AND RESEARCHER ROUNDTABLES

Over the past year, Grain SA strengthened its research partnerships through a series of strategic meetings and site visits with national and academic research institutions. Engagements with ARC-Small Grain and ARC Grain Crops deepened mutual understanding of ongoing work in cultivar development, pest monitoring, and sustainable production systems. Discussions centred on aligning research priorities around herbicide resistance, diagnostics and biosecurity and on fostering innovation through 'Centres of Excellence' and coordinated strategic planning.

The team also visited CenGen in Worcester, a DIPLOMICS partner lab, to learn more about their ongoing contributions to agricultural research and development and molecular services for the sector. These meetings reaffirmed Grain SA's commitment to both public and private research collaboration that enhances producer competitiveness and supports long-term sustainability in the grain industry.

Further collaboration under the DSTI and TIA partnership advanced several key initiatives, including the Wheat Breeding Platform, Soilborne Disease research and the DIFM project. Site visits to research partners in the Western and Eastern Cape highlighted progress on adaptability trials, breeding programme and the integration of big data into precision agriculture. Through these engagements, Grain SA continues to drive applied research that translates into practical, science-based solutions for producers, ensuring a more resilient and future-ready grain industry.





GRAIN SA RESEARCH TEAM STRENGTHENING PARTNERSHIPS THROUGH COLLABORATIVE MEETINGS AND SITE VISITS WITH RESEARCH INSTITUTIONS AND INDUSTRY PARTNERS ACROSS SOUTH AFRICA.

Industry engagement

ATLAS AGRISA 2025 CONGRESS

The Atlas AgriSA Congress 2025 brought together the entire agricultural value chain to address critical challenges and opportunities facing South African farmers. Dr Godfrey Kgatle represented the Grain SA research team at the ATLAS AgriSA 2025 Congress, themed on using data and collaboration to navigate agriculture's challenges. With over 100 presentations, discussions centred on climate change, biosecurity, and factual communication. Grain SA highlighted key issues such as unclear quarantine compensation, delayed chemical registrations, the need for NBTs, fragmented data, and climate risks.



THE RESEARCH TEAM AT THE ATLAS AGRISA 2025 CONGRESS.

RESEARCH AND TECHNOLOGY WORKING GROUP

The Agriculture and Agro-processing Master Plan (AAMP) is strengthening South Africa's grain industry through a unified, evidence-based approach that connects research, policy, and on-the-ground implementation. Under the Grain Value Chain Roundtable (GVCRT), the Research and Technology Working Group (RTWG), chaired by Dr Mahlane Godfrey Kgatle, is driving innovation to support farmers, improve productivity, and enhance climate resilience. Through its five-tier research model and alignment with the national Science, Technology and Innovation Roadmap, the RTWG is ensuring that research investments lead to measurable gains in sustainability, inclusivity, and food security, positioning South Africa as a continental leader in agricultural innovation and competitiveness.



MEMBERS OF THE AAMP RESEARCH AND TECHNOLOGY WORKING GROUP.

RESEARCH SHOWCASE AT NAMPO 2025



RESEARCH DISCUSSIONS AT THE NAMPO HARVEST DAY 2025.

At NAMPO Harvest Day 2025, the Grain SA research team engaged with Minister John Steenhuisen and officials on key research priorities, including biosecurity, conservation agriculture, and science-driven solutions to boost resilience. Led by Dr Lavinia Kisten, the team also launched a national weed survey with HRAC, ARC, and universities to map problem weeds and herbicide resistance, using producer insights to guide sustainable management and strengthen South Africa's grain industry.

MITIGATING PESTICIDE RESIDUE CONFERENCE

This conference on mitigating pesticide residue for food safety, brought together cross-disciplinary expertise to explore cutting-edge scientific developments, regulatory frameworks, and practical innovations that support the monitoring and reduction of pesticide residues across plant and soil systems.

The research team presented on Grain SA's role in aligning policy, science, and farmer practice to secure food and job security. The presentation noted that grain yields have risen from 0,6 t/ha to 6 t/ha through innovation and responsible crop protection. Working with the Department of Agriculture (DoA), CropLife SA, and research partners, Grain SA promotes compliance, label use, and integrated pest management.



DR GODFREY KGATLE PRESENTING AT THE MITIGATING PESTICIDE RESIDUE CONFERENCE.

SCLEROTINIA DAY: HEART OF A FARMER

The South African Sclerotinia Research Network (SASRN) hosted a farmer-led roundtable on the growing challenges oilseeds face from Sclerotinia. Dr Lisa Rothmann outlined key mitigation strategies supported by SASRN, Grain SA, and national partners, while producers shared insights from on-farm trials, underscoring the need to capture farmer-driven data. Discussions centred on the pathogen's lifecycle, field entry points, and urgent turnaround strategies for sunflower, where Sclerotinia and poor yields pose major risks. The event strengthened collaboration between researchers and producers, marking clear progress in tackling this persistent disease.



SASRN LED THE SCLEROTINIA DAY WITH THE THEME 'HEART OF A FARMER'.

INFORMATION HUB WORKSHOP: DATA

The Information Hub and Grain SA hosted a workshop to explore creating an integrated national research data platform. Currently, valuable data sits on individual devices, risking loss when researchers move or retire. Drawing inspiration from Brazil's unified systems, the platform would centralise data on pests, pathogens, soil health, weather, and cultivars, offering real time insights for farmers and policymakers.

Led by Prof. Bernard Slippers with support from DSTI and TIA, the initiative will begin with a Human Capital Development (HCD) funded intern to coordinate data integration, ensuring knowledge preservation and informed decision making nationwide.



INFORMATION HUB WORKSHOP TO DISCUSS INTEGRATION OF GRAIN RESEARCH DATA.

NATIONAL BIOSECURITY SUMMIT AND GRAIN INDUSTRY BIOSECURITY PLAN

The National Biosecurity Summit, held at the University of Pretoria (UP), united government, academia, and industry to address South Africa's rising biosecurity risks under the theme 'Collaborative Actions for Food Security and Trade'.

Hosted by the National Biosecurity Hub, the summit highlighted recent outbreaks like foot-and-mouth disease in animals and Goss's wilt in crops, stressed the need for improved coordination, surveillance, diagnostics, and trade facilitation. Grain SA is developing a national biosecurity plan for the grain industry in collaboration with the National Biosecurity Hub, reinforcing public-private efforts to protect food security and strengthen the competitiveness of South Africa's agricultural sector.



GRAIN SA'S TEAM AT THE NATIONAL BIOSECURITY SUMMIT.

LAUNCH OF DEPARTMENT OF AGRICULTURE'S ONLINE EXTENSION SERVICES

The Department of Agriculture (DoA)'s online farmer support platform, as discussed with industry and government partners, aims to streamline data and improve farmer services. The platform will provide real-time data on production, markets, weather, and biosecurity while enabling targeted advisory services amid limited extension capacity. The research team discussed the ongoing need to for extension support for producers to boost their sustainability and profitability. Stakeholders stressed the need for a collaborative overarching system to integrate existing digital tools and enhance farmer engagement.



THE DEPARTMENT OF AGRICULTURE ONLINE EXTENSION SERVICES LAUNCH.

Crop Improvement Consortium

ADVANCING THE WHEAT BREEDING PLATFORM

Over the past 30 years, South Africa has experienced a notable decline in wheat planting areas, raising concerns around national sustainability and food security. In response, the Wheat Breeding Platform (WBP) was established in 2017, coordinated by Grain SA and involving a collaborative network of industry representatives, breeding companies, researchers, and government stakeholders. The WBP unites experts from both the public and private sectors to support local wheat breeding efforts aimed at improving yields, adaptability, and resilience.

The WBP has greatly enhanced the breeding programs of Syngenta, SA Seed Development and the ARC-Small Grain. A diverse global germplasm collection is characterised genotypically and phenotypically, enabling effective crosses to produce pre-breeding material with improved yield potential, local adaptability, and key traits such as disease resistance. Over the past six years, more than 1 500 entries have been distributed to participating seed companies, enhancing wheat production and building plant breeding capacity across South Africa.

The platform also includes a Pre-Harvest Sprouting (PHS) project, which screens wheat cultivars in the Western and Eastern Cape for their tolerance to sprouting prior to harvest. This work provides valuable insights into cultivar performance under variable climatic conditions and supports the development of varieties that maintain grain quality and yield stability, particularly in regions prone to untimely rainfall.

Table 1: Overview of the Crop Improvement Consortium.

Objective	Sub-objectives	Projects
Conduct pre-breeding to develop inbred lines with improved yield potential.	Source and characterise newly acquired germplasm.	Wheat Breeding Platform
	Incorporate new germplasm into local nurseries.	
	Conduct multilocality field trials to identify germplasm traits of interest.	
	Make use of phenotyping and genotyping to improve selection of improved traits.	
Support local breeding efforts.	Distribute germplasm to local breeding programmes.	Wheat Breeding Platform
	Screen commercially available cultivars for tolerance to pre-harvest sprouting.	Evaluate Pre-Harvest Sprouting (PHS) of local wheat
Build local plant breeding capacity.	Train students in plant breeding.	Wheat Breeding Platform
	Train graduates as technicians.	

In September, the Grain SA Research Team, together with representatives from the DSTI and the TIA, visited the WBP at SU. The engagement offered an opportunity to reflect on the platform's achievements, review current progress, and plan for the future. The visit included tours of the phenotyping (PhenoSpex) facilities, field trials, and laboratory spaces, providing valuable insights into the program's ongoing contributions to wheat research and breeding.

The program has also seen leadership changes, with Willem Botes moving on to the barley industry, where he now serves as managing director of South African Barley Breeding Institute (SABBI). SU remains committed to the WBP and is actively seeking a replacement for Botes. In the meantime, the platform is fully capacitated to continue its work.

Research highlights in the Crop Improvement Consortium

- **High-yielding wheat germplasm distributed:** The Wheat Breeding Platform successfully distributed 149 high-yielding entries to major breeding partners, supporting cultivar development tailored to South African conditions.
- **National screening capacity for Preharvest Sprouting Established:** Rainfall simulators and lab infrastructure were expanded, enabling the completion of 2 226 grain quality assays across 19 wheat cultivars. This supports reliable evaluation of sprouting tolerance under South African conditions.
- **Construction of the new national plant phenotyping facility at SU is progressing well:** Part of a R50 million DSTI-funded initiative, the platform will play a key role in supporting the Wheat Breeding Platform and other national research initiatives.

Plant Health Consortium

South Africa's grain industry faces growing threats from increasingly unpredictable climatic conditions, which threaten both yields and national food security. can severely impact yields and food security. The Plant Health Consortium leads a coordinated response, translating scientific research into practical strategies through surveillance, diagnostics and practical management strategies.

This year the consortium strengthened collaborations across research, government, and industry, expanded diagnostic services, and engaged directly with farmers to turn scientific insights into actionable solutions that safeguard crop health and support sustainable grain and oilseed production, addressing national priorities such as food security and sustainability.

The Plant Health Consortium plays a crucial role in safeguarding South Africa's grain and oilseed production by connecting research, industry, and farmers. Its work enhances early detection, surveillance, and management of key pests and diseases, translating scientific findings into practical solutions that protect yields and support sustainable farming.











Table 2: Overview of the Plant Health Consortium.

Objectives	Sub-objectives	Projects
Strengthen diagnostic, extension, and survey capabilities for grain and oilseed industry.	Deliver pest and disease diagnostic services to producers through field visits and clinic support.	**Project 1:** Survey and evaluation of potential entomopathogenic nematodes (EPNS) strains against stem borers of maize and sorghum in South Africa. **Project 2:** Distribution patterns and relative abundance of stem borers. **Project 3:** Seasonal activity and distribution patterns of fall armyworm (Lepidoptera: Noctuidae) moths in maize growing areas around two provinces in South Africa. **Project 4:** Distribution patterns and relative abundance of stem borers on maize and sorghum in the Limpopo province. **Project 5:** Mapping maize ear rots and their toxins in South Africa and the development of disease prediction model.
	Coordinate targeted pest and disease surveys across production regions to inform management strategies and early warning systems.	**Project 6:** Pest & pathogen diagnostics.
Develop and implement integrated pest and disease management strategies.	Design and evaluate region-specific management strategies for economically significant pests and diseases.	**Project 7:** South African Sclerotinia Research Network. **Project 8:** Innovative disruption of Sclerotinia sclerotiorum melanin production: a novel polymer approach to manage sunflower head rot. **Project 9:** Plant disease surveillance: value adding to the national soybean and sunflower cultivar trials. **Project 10:** Fungicide evaluation trials on Sclerotinia head and stem rot in sunflower. **Project 11:** Manipulating flower timing with plant growth regulators as a possible sunflower escape strategy from Sclerotinia head rot. **Project 12:** Surveys of soilborne diseases in summer grain production systems with special emphasis on the development of management strategies including crop rotation/cover crops and seed treatment for black commercial farmers. **Project 13:** Surveys of diseases in summer grain production systems of black commercial farmers. **Project 14:** Management of cutworms. **Project 15:** Tracing the origin, spread and herbicide resistance profiles of Palmer amaranthus in South Africa. **Project 16:** Investigating the feasibility and efficacy of harvest weed seed control in different cropping systems in the Western Cape.

FALL ARMYWORM MONITORING AND DISTRIBUTION MAPPING

Fall armyworm (*Spodoptera frugiperda*) is a major pest of maize in South Africa, first detected in Limpopo and North West in 2017 after spreading from the Americas. The larvae damage young maize plants and also affect crops like sorghum. Their populations are shaped by environmental conditions and farming practices.

To support early warning and sustainable management, this study monitored seasonal activity and distribution using pheromone traps in Gauteng and North West. The two-component lure and green-yellow bucket traps were most effective, with moth numbers peaking in autumn. Warm, dry conditions and irrigation favoured survival, while high summer rainfall reduced populations.

North West showed the highest activity, driven by continuous maize planting, late planting, and crop residue retention. Timely planting and crop rotation helped reduce pest pressure. This project provides essential information to support early detection, timely intervention, and sustainable management of fall armyworm in South African maize production systems.

STRATEGIC DEVELOPMENTS IN PLANT HEALTH CONSORTIUM – GOSS'S WILT

In 2024, Goss's wilt, a bacterial disease caused by *Clavibacter nebraskensis*, was confirmed in multiple provinces, posing a serious threat to maize yields and national production. Its rapid spread and limited control options underscore the need for timely management and coordinated research to safeguard crops and food security.

In response, the Plant Health Consortium has expanded its focus through the newly established Goss's Wilt Research Platform. This initiative brings together leading institutions, including the ARC, CSIR, and the UP (DPSS and FABI), with Grain SA coordinating efforts. The project sets out a national framework for surveillance, pathogen characterisation, cultivar evaluation, rapid diagnostics, and producer engagement, aiming to strengthen early detection, improve management strategies, and build collaborative capacity across the industry.

Research highlights in the Plant Health Consortium:

- **Fall armyworm mapping completed:** Seasonal distribution and population dynamics of fall armyworm were successfully mapped across Gauteng and North West provinces using pheromone traps, providing critical data for pest monitoring and management.
- **Maize ear rot surveillance and predictive modelling:** Multi-mycotoxin data is being integrated with fungal and weather variables to develop disease prediction models. DON-related toxins were consistently present in several regions, and the work received international recognition.
- **Sclerotinia Research Network expansion:** The South African Sclerotinia Research Network strengthened its collaborative platform through farmer roundtables, social media outreach, and training events, enhancing visibility and knowledge exchange.
- **Cutworm management insights:** Economic losses due to cutworm infestations in maize were quantified. Surveys and trials advanced understanding of cutworm ecology, natural enemies, and resistance, informing future control strategies.
- **Palmer amaranth genomic profiling:** High-coverage genome sequencing of South African Palmer amaranth populations revealed extensive genetic diversity. This will contribute to the development of herbicide resistance management plans.

Climate Resilience Consortium

The Climate Resilience Consortium was established to explore the effects of climate change and variability on agricultural production and to enhance resilience, thereby ensuring future food and nutrition security. The 2024/2025 season's extreme weather again tested South Africa's grain systems, yet the Climate Resilience Consortium made significant progress in turning climate-smart research into practical tools for farmers. Six years of maize trials confirmed yield penalties of up to 50% with late planting, while advanced imaging and economic studies deepened understanding of heat and drought stress. Disease and genetic studies revealed shifting pathogen dynamics, guiding new breeding and management approaches.

On the ground, pre-commercial drought- and heat-tolerant hybrids are nearing release, with plans to ensure affordability for smallholders. Long-term soil and rotation trials provided critical insights showing that conventional tillage can outperform minimum-till systems under extended drought, but that rotations incorporating cover crops enhance soil structure, microbial activity, and resilience over time. This work gives farmers region-specific insights into how soil management choices affect productivity and risk reduction under changing rainfall patterns.

The DIFM and soil health projects are integrating precision agriculture and ecological indicators to optimise input use and monitor soil biological function. By linking big data with on-farm experimentation, these projects help farmers refine fertiliser and seeding strategies for both profitability and sustainability. Microbial and nematode analyses revealed that soil biological activity fluctuates strongly during the season, reinforcing the need for time-sensitive soil monitoring. Collectively, these projects are empowering South African farmers with actionable data, locally adapted technologies, and resilient production practices to withstand climate uncertainty.

Collectively, these outcomes show the consortium's tangible impact in strengthening South Africa's adaptive capacity, translating scientific research into resilient, profitable, and sustainable grain farming systems.

Table 3: Overview of the Climate Resilience Consortium.

Objectives	Activity	Projects
Build a knowledge base of the effect of climate change on agriculture.	Investigate the impact of climate variability and change on crop production.	**Project 1:** The effects of a changing environment and late-planting dates on maize plant development and yield in South Africa.
Develop climate change response plans.	Establish long-term trials to support sustainable production and build agronomic capacity.	**Project 2:** Expanding genetic variability for heat and drought stress and multi-locality hybrid evaluation.
	Data Intensive Farm Management (using precision agriculture techniques to improve agronomic management).	**Project 3:** Long-term crop rotation and tillage.
	Improving seed germination and evaluating the growth and yield potential of alternative crops (pigeon pea and dry beans).	**Project 4:** From seed to harvest: A temporal odyssey of ecosystem dynamics in grain systems.
	From seed to harvest: A temporal odyssey of ecosystem dynamics in grain systems.	**Project 5:** Development of region-specific crop rotation programmes for the Eastern Free State.
	Scaling on-farm precision experimentation (OFPE) in the South African Grain industry, towards data-driven decisions for smallholders.	**Project 6:** Yield potential and adaptation of grain crops in the Eastern Cape.
		Project 7: Data Intensive Farm Management (Using precision agriculture techniques to improve agronomic management).
		Project 8: Improving seed germination and evaluating the growth and yield potential of alternative crops (pigeon pea and dry beans).
		Project 9: Scaling on-farm precision experimentation (OFPE) in the South African Grain industry, towards data-driven decisions for smallholders.

STRATEGIC DEVELOPMENTS IN CLIMATE RESILIENCE

Two new projects focus on building scientific tools to improve farmers' ability to adapt to climate stress. The TerraClim project is developing a national climate/yield database that links detailed weather records with crop performance to pinpoint where climate change poses risks or new opportunities for maize and soybean production. This will help farmers and policymakers make smarter, region-specific decisions for planting and investment.

The UP's project is unlocking drought-resilient soil microbiomes to create early warning systems and improve maize tolerance to water stress through beneficial microbes and root metabolites. These innovations will strengthen soil health, reduce input costs, and help farmers maintain stable yields during drought conditions.

Research highlights in the Climate Resilience Consortium

- **Late planting risks quantified:** Six years of maize trials confirmed up to 50% yield loss when planting shifts from mid-December to mid-January. Thermal imaging and physiological data revealed water stress and reduced stomatal conductance as major contributors to lower yields.
- **Drought-tolerant hybrids ready for market:** Heat- and drought-tolerant maize hybrids are now entering pre-commercialisation. These hybrids are tailored for smallholder farmers, with affordability models under review to ensure accessibility.
- **Soil health monitoring framework emerging:** Long-term soil ecosystem studies showed that seasonal timing is the dominant driver of microbial activity and nutrient cycling. Findings support time-sensitive, crop-aware soil monitoring strategies to guide sustainable management.
- **Cover crops boost microbial functionality:** Eastern Free State rotation trials demonstrated that cover crops consistently enhance microbial diversity and soil health compared to fallow plots, reinforcing their role in climate-resilient farming systems.

Food and Nutrition Consortium

The Food and Nutrition Security Consortium continues to drive impactful change in rural communities through agro-processing innovation. In partnership with the University of the Free State (UFS), and government agencies, the consortium has developed affordable, nutritious maize-based products using nixtamalization techniques. These include maize milk, frozen desserts, and custard tarts, which have undergone sensory and nutritional evaluations. Phase 3 of the project focuses on empowering women entrepreneurs through training, recipe development, and the rollout of mobile kitchen units designed for small-scale food businesses.

Entrepreneurial training and business model development have enabled participants, many of whom are older women with limited prior experience, to launch viable food enterprises from home or as vendors. The nixtamalization training course has reached nearly 3 000 smallholder farmers in 2025 alone, equipping them with practical skills to transform maize into market-ready products.

Feedback from trainees highlights the programme's role in improving household nutrition and creating income opportunities, reinforcing the consortium's commitment to inclusive, science-driven rural development.



THE MOBILE KITCHEN UNIT WHICH WILL BE USED BY THE TEN ENTREPRENEURS.

Research highlights in food and nutrition security

- The UFS successfully designed and produced mobile food carts to support rural entrepreneurs, especially women. These "business-in-a-box" units enable small-scale food production and sales using nixtamalised maize products. Ten carts are now in production, marking a major step toward sustainable micro-enterprise development in low-income communities.

Human Capital Development Consortium

The Human Capital Development (HCD) Consortium, under the Strategic Innovation Partnership for Grain and Oilseeds, continues to build South Africa's agricultural research capacity and drive transformation in 2025. This year, it supported 23 individuals, 21 students (ten PhD, eight MSc, two Honours) and two technicians across eight institutions, focusing on key research areas such as Sclerotinia and disease diagnostics, weed science, crop improvement, and climate resilience field trials. Through collaboration with DSTI, TIA, and SACTA, the consortium also appointed two research assistants at the UFS for Sclerotinia work and contributed to the DSTI Mixed Farming Project, which maps grain production challenges and opportunities at provincial level.

The consortium's impact extends beyond training, with several participants now employed in organisations such as the ARC and SeedLink, highlighting its success in developing skilled professionals for the industry. By integrating bursary support, technical training, and project-based learning, the HCD Consortium is cultivating a diverse and future-ready workforce equipped to advance innovation, sustainability and resilience in South Africa's grain industry.

Cultivar evaluation trials

MAIZE CULTIVAR EVALUATION TRIALS (MCET)

Maize is cultivated across all nine provinces of South Africa, with the Free State, Mpumalanga and North West producing more than 80% of the national crop. On average, 2,5 million hectares are planted annually, making maize the country's dominant summer grain.

To support producers in selecting the best-performing cultivars for different climatic regions, Grain SA and the South African National Seed Organisation (SANSOR) implemented a project with seed companies to conduct annual, independent maize cultivar evaluation trials. Cultivars are coded for anonymity and planted in a scientifically designed and replicated layout, with data independently analysed by the ARC.

The 2024/2025 season proved challenging due to early heat and drought followed by late rains, resulting in variable yields. Despite this, the trials continued to provide valuable insights into cultivar performance across South Africa's eight maize-producing regions. Results from the season are available on *https://sagrainmag.co.za/*, the *SA Graan/Grain* magazine's website.

Strategic partnerships

GRAIN SA MEMBER SERVICES

Member data and levies

LEVY INCOME USED TOWARDS PRODUCER SUSTAINABILITY

Commodity levy

The income that is obtained from Grain SA's member levies remains one of the main sources of income in the Grain SA structure. The member levy not only funds many of the Grain SA activities, but also plays a vital role in the mandate of the organisation to negotiate on behalf of grain producers in South Africa.

The agricultural environment remains challenging and the margins in the grain industry are limited. Grain SA therefore wants to sincerely thank every member who pays their levies to Grain SA. This income enables the organisation to look after the interests of grain producers. However, members of Grain SA can be assured that the income received from the member levies is used effectively to protect the interest of producers in the grain industry.

Membership of Grain SA

Grain SA's Constitution 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. During the 2025 annual Grain SA Congress an increase in levies for the 2025/2026 financial year was approved, as indicated in **Table 1**. Study-group members currently pay R50 per member per year.

Table 1: The levy per ton per crop for the 2025/2026 production year.

Crop	Levy per ton
Summer grains	
Maize	R4,50
Sorghum	R5,10
Soybeans	R8,80
Sunflower	R8,80
Groundnuts	R15,30
Winter cereals	
Wheat	R5,10
Canola	R7,00
Barley	R5,10
Oats	R5,10
Other grains	R5,10

** The above amounts exclude VAT*

New era producers (developing producers) who produce more than 100 tons of grain for the commercial market can also become members of Grain SA by paying the prescribed fees on the same basis as commercial members.

In addition to the work Grain SA does to look after the interests of grain producers, there are also exclusive benefits for which Grain SA members qualify. These benefits include the following:

- Tax-free savings plan with Corporate Guarantee
- Analysis of fertiliser quality
- Support with the diesel rebate
- Free tickets with allocated parking for NAMPO, NAMPO ALFA and NAMPO Cape
- Special Grain SA member prices at Nexus Transmission Components

Collection of levy

Grain SA is a voluntary organisation and the levy is therefore collected via different methods. The two most common ways for collecting the levy are through collection agents and through direct payments to Grain SA.

THROUGH THE COLLECTION AGENTS

Collection agents are mainly companies that are involved in the trading, handling, storage and processing of grain. Grain SA concludes contracts with these companies, who then collect the levy from producers and pay it over to Grain SA. The logos on page 76 indicate the partners who currently collect the Grain SA levy.

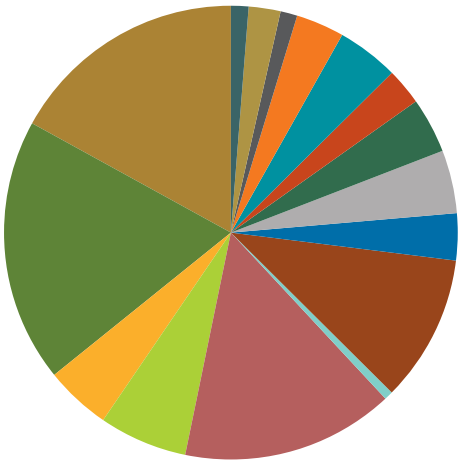
DIRECT PAYMENTS

Grain SA members can also make direct payments to Grain SA if they prefer to. With direct payments the producer can inform Grain SA of the number of tons delivered and Grain SA will then issue an invoice to the producer.

Employment of levy

The levies received by Grain SA from producers are used for specific purposes, focusing on the sustainability of producers. **Graph 1** depicts the employment of the levy in the 2024/2025 season.

Grain SA expenses.



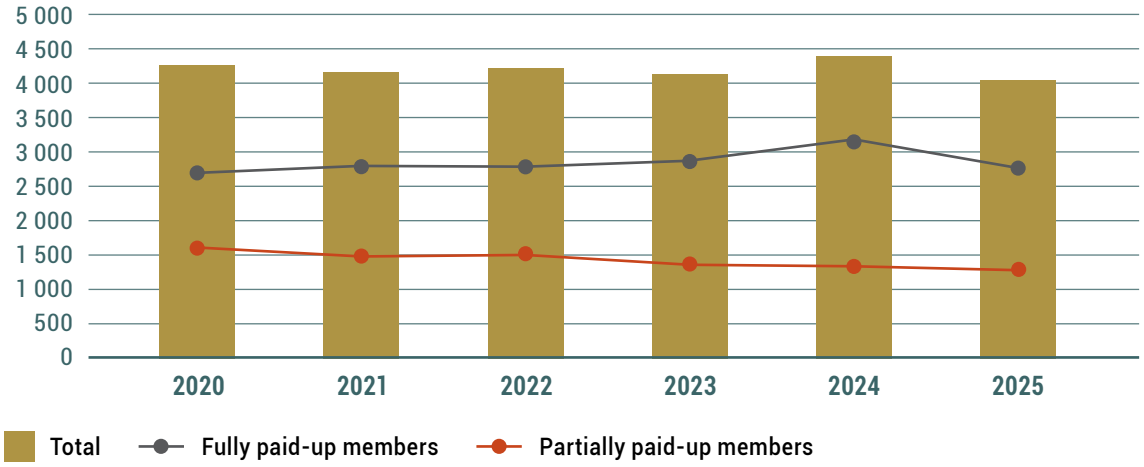
- 1,25% Office and Admin Fees
- 2,27% Farmer Development
- 1,21% Audit Fees
- 3,44% Branch Funding
- 4,40% Commission – Marketers
- 2,62% Member Benefit Fees
- 3,95% Affiliation: AgriSA
- 4,51% Depreciation
- 3,34% Marketing Fees
- 10,48% Commission – Membership Fees
- 0,62% Investment Fees
- 15,16% Applied Economics
- 6,29% Research Coordination
- 4,69% IT and Workflow
- 18,79% Financial and Admin Services
- 17,00% CoSec Services

Member statistics

GRAIN SA

Only grain producers can be members of Grain SA. The total active members who contributed to the Grain SA Levy Fund for the 2025 levy year were 4 954, with 2 716 of them being fully paid-up members, with a year-on-year decline of 11%. This was largely due to the challenging production conditions, particularly in the western parts of the country. The total number of paid-up study group members was 1 583.

Grain SA membership.



Study group members paid up.

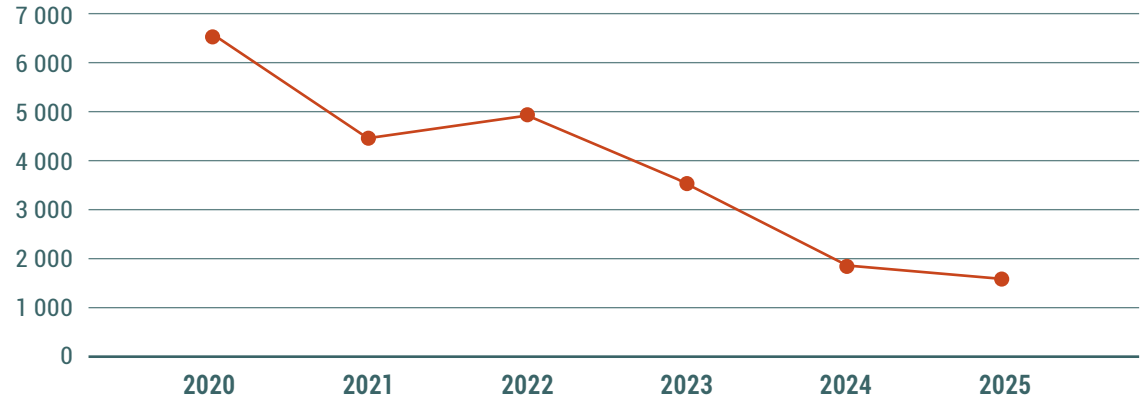


Table 2 sets out the member numbers and the beneficiaries from the Phahama Grain Phakama (PGP) project for the 2024/2025 levy year.

Table 2: Grain SA members.

Member data	Grain SA members			Beneficiaries	
	Commercial members		Study group	PGP	Description
	Commercial	New era/potential commercial			
Paid-up members	2 716	61	1 583		Paid => R1 100
Active members	4 954	121	4 308		Paid in the past 5 years
				18 398	Beneficiaries from PGP programme
Subtotal	7 670	182			
Total	**7 852**		**5 891**	**18 398**	

Grain SA collection agents









GRAIN SA ENTITIES

Phahama Grain Phakama NPC

PROGRAMME STILL DELIVERS ON ITS VALUE PROPOSITION

Introduction

Grain SA's Farmer Development Programme, Phahama Grain Phakama (PGP), continues to play a pivotal role in transforming the agricultural landscape in South Africa. Since the programme's inception, PGP has through targeted training, mentorship, and the facilitation of access to critical resources delivered impactful interventions that addresses the needs of developing black producers.

The successful implementation of the programme continues to be underscored by adaptive strategies and stakeholder engagement which provides a roadmap for sustainable progress. Although challenges such as limited access to finance, mechanisation, and climate variability persist, PGP programme continues to deliver results. These include the expansion of study groups, the success of the Beyond Abundance project, and the growth of loan funded producers.

These initiatives have demonstrated that with the right support, subsistence producers, small holder producers including potential commercial producers can achieve sustainable growth and contribute meaningfully to national food security and economic growth.

PGP, supported by key stakeholders such as the Maize Trust, Oil and Protein Seeds Development, Sorghum Trust and Winter Cereals Trust continue to deliver on its value proposition. In recent years, collaboration with government departments, including Rural Development and Land Affairs, Agriculture, and Science and Technology – has further strengthened the programme's reach.

These partnerships have facilitated funding, technical support, and policy alignment, ensuring that the development programme continues to impact on the lives of farmers across diverse regions.

The purpose of farmer development

Agriculture in South Africa sits at a crossroads. On one end, world-class commercial producers who produce the bulk of the country's food; on the other, thousands of black producers who contribute less than 10% in grain production. These producers struggle with limited infrastructure, poor market access, limited access to funding, limited access to mechanisation and fragmented production systems. Bridging this gap is no longer just an aspiration, it is essential for inclusive growth, food security, and long-term sustainability.

The PGP Farmer Development Programme seeks to provide developmental support to black grain producers so that they can participate meaningfully in the grain value chain. This means moving beyond subsistence farming to a modern, commercial, and technologically advanced system that creates opportunities for all. At its heart, PGP's Programme seeks to promote inclusive growth, food security, poverty alleviation, job creation, and land ownership for our black producers. The key activities undertaken by PGP to support the producers include the following:

- **Study groups:** This is the first point of contact with producers. Monthly meetings are held with producers during the winter months and during these meetings, study material is shared and discussions are encouraged.
- **Advanced producer service:** These producers cannot access production loan financing. The on-farm support is to get them compliant and ready for loan financing.
- **Mentoring of funded producers:** These producers have access to production loans that are managed by PGP though the Grain SA financial team. They get bi-weekly on farm support to assist them with production and growth in all aspects of their business development.
- **Demonstration trials and producers' days:** The purpose of these are to plant trials which demonstrate good practice and alternative crops. The producer days are usually held at the sites of the trials, and all industry role players are invited to give lectures and share their knowledge.

- **Producer of the Year competition:** The purpose of the competition is to showcase development, recognise excellence, and create role models with whom the different levels of producers can identify.
- **Training courses:** PGP has developed several training courses over the years which address all aspects of crop production, marketing, mechanisation and management. These are intensive courses presented to the producers within the radius of their farming operations.

Agricultural transformation in South Africa is more than a policy directive – it is a moral and economic imperative. Overcoming the stigma of a dualistic sector requires bold leadership, innovative partnerships, and a shared vision for an inclusive future. By aligning resources, policies, and people, South Africa can build an agricultural sector that is not only globally competitive but also socially just and sustainable for generations to come.

Measuring impact in the sector

The phrase 'To measure, is to know' is an aphorism commonly attributed to the British scientist William Thomson (Lord Kelvin), and it embodies the idea that only by quantifying something can we truly understand it. A related sentiment often paired with this idea is, 'If you cannot measure it, you cannot improve it', which emphasizes how measurement provides the foundation for control and progress.

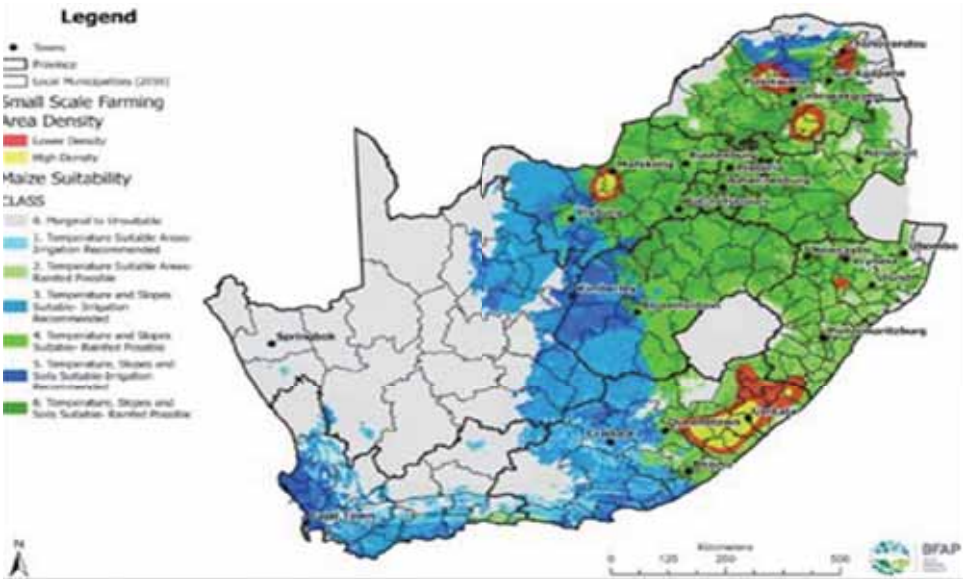
In this development sector, knowing what to measure and how to measure it has remained a critical question for which we still do not have a definitive answer. The Human Development Index of the United Nations Development Programme (UNDP) uses three important dimensions namely health (measure in life expectancy), education (measured in years of schooling) and quality of living (measure as income per capita).

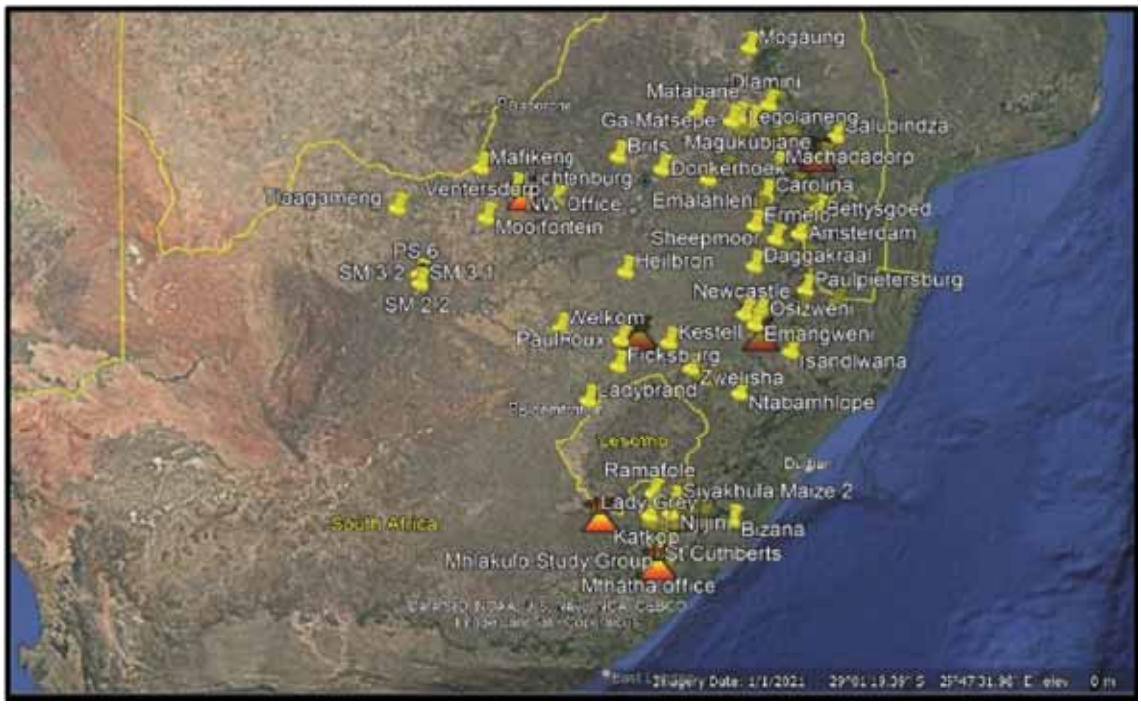
In the agricultural sector, it is relatively easy to measure aspects including land tenure, size of land, area planted, enterprise budgets, yield attained, income achieved etc. However, the development of people is far broader than those measures. Therefore we need to include human outcomes and people's capabilities.

Through agriculture, we can contribute to the UNDP sustainable development goals which include, no poverty, zero hunger, good health and well-being, quality education and training, gender equality, economic growth, industry innovation, sustainable communities, and climate action (smart agriculture). In the coming months, we will be working on how we are to measure the broader impact of our agricultural development on the lives of people on the programme. We are also partnering with BFAP to align our measurement systems.

Footprint of the PGP Development Programme

The PGP Programme continues to support producers in all the provinces except for the Northern Cape. As a result of the history of South Africa, the land tenure arrangements and population distribution in each area is different. The map below shows the areas that are well suited for grains, oilseeds and grain production.





THIS PICTURE FROM GOOGLE MAPS SHOWS THE FOOTPRINT OF THE PROGRAMME.

The former self governing territories of Limpopo, Eastern Mpumalanga, KwaZulu-Natal and the Eastern Cape have many producers on communal land, whereas the Western parts of Mpumalanga and the Free State have fewer numbers of producers with larger tracts of arable land (commercial farms).

The North West province has an interesting combination of larger owned farms and blocks of communal land. However, the average size of communal land allocated to producers in the North West province is 15 ha, whereas on the eastern side of the country, the average access is 1 ha (perhaps in line with the productive value of land in the higher rainfall areas).

Table 1 below shows the land that is used by the active producers in our programme, as well as the land that the producers have access to. This is only the arable land, and it is only 'active' producers – those who have attended various programme activities over the past two years.

Table 1: Land used by active producers in the PGP Programme.

		Land to which farmers have access			
Province	Arable land being used	Communal land ha	PLAS	Leased	Own
Eastern Cape	4 050	3 677	380	520	1 063
Free State	12 637	83	12 130	7 415	3 627
KwaZulu-Natal	3 601	2 056	1 550	1 752	1 910
Limpopo	1 039	2 357	0	0	103
Mpumalanga	7 169	3 027	4 156	4 019	690
North West	28 251	13 620	10 176	2 674	2 471
TOTAL	**56 747**	**24 820**	**28 392**	**16 380**	**9 864**

Statistics of producers in the PGP Programme

The programme continues to grow as we constantly have producers joining, which is a testimony to the impact that the programme is having on the lives of producers. PGP producers are classified as follows:

- **Subsistence** – 0,5 ha to 10 ha of arable land being used

- **Small holder** – 10,5 ha to 50 ha of arable land being used
- **Potential commercial producers** – using more than 50 ha of arable land but producing less than 250 tons
- **New Era commercial producers** – producing more than 250 tons of any grains, cereals or oilseeds in one year

Table 2 indicates the number of producers per category in number per office.

Table 2: Producers per category in numbers per office.

Producers per category in numbers per office							
	Subsis-tence	Small holder	Potential	New Era	Commercial		
Free State	3	108	43	42	7	**203**	**0,99%**
North West	18	301	96	37	2	**454**	**2,22%**
Maclear	2 393	34	2	0	3	**2 432**	**11,91%**
Kokstad	3 607	24	13	3	3	**3 650**	**17,87%**
Mthatha	5 986	10	2	0	0	**5 998**	**29,37%**
Dundee	4 317	60	33	8	3	**4 421**	**21,65%**
Mbombela	3 244	17	3	0	0	**3 264**	**15,98%**
TOTAL	**19 568**	**554**	**192**	**90**	**18**	**20 422**	**100,00%**
	95,82%	**2,71%**	**0,94%**	**0,44%**	**0,09%**		

Access to arable land is an important factor in the development of producers. **Table 3** shows the land that our producers have available to use:

Table 3: Hectares per category per PGP office.

Hectares per category per development office							
	Subsis-tence (ha)	Small holder (ha)	Potential (ha)	New Era (ha)	Commercial (ha)		
Free State	-	13 250	9 206	13 247	5 340	41 043	**31,14%**
North West	76	21 366	11 120	10 574	750	43 886	**33,30%**
Maclear	1 286	1 830	240	-	200	3 556	**2,70%**
Kokstad	3 459	2 110	1 405	1 101	680	8 755	**6,64%**
Mthatha	5 417	349	500	-	-	6 266	**4,75%**
Louwsburg	850	2 386	2 279	4 862	1 385	11 762	**8,93%**
Dundee	4 506	2 317	2 247	2 366	1 187	12 623	**9,58%**
Mbombela	2 545	1 350	-	-	-	3 895	**2,96%**
TOTAL	**18 139**	**44 958**	**26 997**	**32 150**	**9 542**	**131 786**	**100,00%**
	13,76%	**34,11%**	**20,49%**	**24,40%**	**7,24%**		

Study groups

The purpose of the study groups is to encourage developing producers – primarily subsistence and small holder farmers – to join study groups which are facilitated by a Grain SA/PGP Regional Development Coordinator and team who are experienced agriculturalists and generally competent in the language of each group of producers. To ensure that the producers and facilitators meet regularly throughout the season, to learn and share knowledge about improving grain production yields through modern methods of best practice at an appropriate level for the producers.

The study groups are also a community platform for peer-to-peer learning; a place for discussion and sharing, where those who have less knowledge and skills in grain production can learn from more experienced growers who have already gained experience and graduated from the study group training programme. Developing producers enjoy acquiring first-hand knowledge from the more experienced members of the group.

During this reporting period, the PGP Programme has been supporting 146 active study groups. At least six study group meetings are held with each study group, and **Table 4** shows the number of people who have attended the meetings. During these meetings, producers are trained on all aspects of farming – production, mechanisation and management (at the different appropriate levels depending on the classification of producers attending that meeting).

Table 4: Attendance of study group meetings.

Province	Attendance
Eastern Cape	3803
Free State	84
KwaZulu-Natal	1421
Limpopo	2481
Mpumalanga	2157
North West	120
TOTAL	**10 066**



Beyond Abundance (BA) project (off shoot of the study group project)

In the season of 2024/2025 PGP, with the support of the Sasol Agricultural Trust and SACTA, subsidised 20% of input cost per hectare to the BA producers. **Table 5** shows the progress of this project since it started in the 2019/2020 production season.

Table 5: Progress of the BA project.

Year	Contribution per ha	Number of producers	Number of hectares	Average yields attained	Producer contributions
2014/2015	R1 500	855	855	1,5	R1 282 500
2015/2016	R1 750	1 674	1 776	1,5	R3 078 002
2016/2017	R2 000	2 905	4 120	4,28	R8 601 622
2017/2018	R2 900	3 804	5 173	4,3	R14 802 964
2018/2019	R3 200	5 251	7 251	4,3	R22 544 258
BA 2019/2020	R3 500	5 104	7 000	4,13	R24 500 000
BA 2020/2021	R4 000	2 497	3 118	3,45	R12 472 000
BA 2021/2022	R4 000	2 778	4 073	3,8	R16 292 000
BA 2022/2023	R8 100	682	593	4	R4 803 300
BA 2023/2024	R9 000	565	573	3,8	R5 157 000
BA 2024/2025	R6 600	1 126	1 611,5	4	R10 635 900
BA 2025/2026	R7 000	2 049	2 814	-	R19 700 000

Table 6A: Producers per province 2024/2025 season.

Province	Total	Female	Male	% Women
Eastern Cape	411	219	192	53,28%
KwaZulu-Natal	219	112	107	51,14%
Limpopo	260	152	108	58,46%
Mpumalanga	234	106	128	45,30%

Table 6B: Producers per province 2025/2026 season.

Province	Total	Female	Male	% Women
Eastern Cape	1025	552	473	53.85%
KwaZulu-Natal	241	116	125	48.13%
Limpopo	528	336	192	63.64%
Mpumalanga	255	108	147	42.35%

Support to individual advanced producers

The purpose of this programme is to support the outstanding candidates who have emerged from the study group system as potential New Era commercial producers. These are producers who, although they demonstrate promise and potential, need one on one support in terms of production planning, management, support in terms of financial applications and reporting as well as business and entrepreneurial skills development etc. It is a priority of Grain SA to assist producers to full commercialisation so once these developing and outstanding producers are identified, we target them with focussed services and support.

- To access, wherever possible, recapitalisation from the Department of Rural Development.
- To get Development and Land Reform to 'fast-track' their development.
- To access production loans for the producers wherever possible so that these producers can use the land available to them.
- To assist the producers with access to mechanisation in cases where this is a challenge.
- To build stronger support networks in the sector for the producers to tap into.

PLAN TO GET THE PRODUCERS READY

Through the advanced producer programme, we endeavour to get producers ready for the next step of grain farming which will make them eligible for loan financing. In order to assess the producers and their skills, we have developed a score card and a skills audit that we are using to identify needs.

In the PGP Programme currently, we have over 800 producers in the Small holder to New Era commercial producer categories. Currently we have funding applications in process for 82 producers (approximately 10% of the producers). The other producers need to be serviced and supported to reach this level of farming and business acumen.

Loan Funded Producers (offshoot of the Advanced Producers Project)

One of the major focus areas of the entire programme is to develop commercial producers who are producing grains, cereals and oil seeds at a commercial level. The production costs per hectare are high and most producers with access to larger fields need to borrow money to finance the production. This is one of the main challenges of the entire producer development in South Africa.

Lending money to a developing producer is risky for a number of reasons: The producer usually does not have adequate experience, the mechanisation might not be up to standard, the soil status might not be ideal (with regard to phosphates and soil acidity), the skills of the producer might be lacking, and in addition to that, the current weather patterns are variable – some years are too dry, some too wet, some late rains in the spring, some late rains in the autumn, unseasonal hot and cold spells have been observed. All these add to the risks.

Most commercial lending institutions, including the agri-businesses are profit driven and risk averse (they need to work conservatively with the funds their shareholders entrust to them).

PGP has been fortunate over the past number of years to be able to get production loans from ABInbev (now no longer available), SACTA and PepsiCo – these are interest free loans. We have also managed to have producers funded through a partnership between Standard Bank and the Kgodiso Development Fund – these are interest bearing.

Unfortunately, over the past number of years, we have had many defaulting producers – mostly caused by unseasonal weather. This past season for example seemed to be a very good one for maize until the late rains spoiled the quality of the grain. We have producers who harvested many tons, but the grade was so low that they were unable to realise a relevant yield.

Each year we try to increase the number of loans-funded producers as well as the size of their loans.

Season	Number of producers	Total loan value (R)
2024/2025	33	35,2 million
2025/2026 in pipeline to be funded	48	70,4 million

Demonstration trials and producers' days

One of the activities in the development programme has been the planting of demonstration trials and the hosting of producers days at these sites. The value of actually experiencing the different crops, different methods of weed control, different rates of fertilisation etc. is great as particularly in the deep rural areas, the producers are not surrounded by commercial producers where they can witness good farming practices.

Table 7: Days presented over the past year.

Event type	Event date	Service center	Office	Responsible person	Attend-ance
Producers' days	2025-08-20	Eastern Cape	Maclear	Johan Nel	78
Producers' days	2025-07-09	Eastern Cape	Mthatha	Cwayita Mpotyi	94
Producers' days	2025-06-19	Limpopo	Mbombela	Jerry Mthombothi	70
Producers' days	2025-06-16	North West	Lichtenburg	Du Toit van der Westhuizen	39
Producers' days	2025-05-30	Mpumalanga	Mbombela	Jerry Mthombothi	98
Producers' days	2025-05-29	KwaZulu-Natal	Dundee	Phumzile Ngcobo	81
Producers' days	2025-05-28	Limpopo	Mbombela	Jerry Mthombothi	156
Producers' days	2025-05-28	KwaZulu-Natal	Kokstad	Eric Wiggill	71
Producers' days	2025-04-30	Free State	Free State	Jacques Roux	55
Producers' days	2025-03-20	Free State	Free State	Jacques Roux	112
Producers' days	2025-03-20	KwaZulu-Natal	Dundee	Phumzile Ngcobo	130
Producers' days	2025-02-27	KwaZulu-Natal	Dundee	Phumzile Ngcobo	120
Producers' days	2025-02-21	Limpopo	Mbombela	Jerry Mthombothi	85
Producers' days	2024-11-07	North West	Lichtenburg	Lebo Mogatlaanyane	54
Producers' days	2024-10-17	Free State	Free State	Jacques Roux	48
Producers' days	2024-10-15	Mpumalanga	Mbombela	Jerry Mthombothi	59
TOTAL					**1 350**





Producer of the Year competition

The Producer of the Year competition has been on-going since 2003. Initially the competition was only for the larger producers. However, we soon realised that all the different levels of producers need to have role models, and as a result PGP celebrates success at every level.

Table 8 contains the names of all the entrants to the competition for 2024/2025 season.

Table 8: Names of the entries for the 2024/2025 Producer of the Year competition.

Province	Service centre	Coordinator	Producer	Event year	Category
Mpumalanga	Dundee	Graeme Engelbrecht	Mabuza Simphiwe Senzeko	2025	Commercial
Free State	Free State	Jacques Roux	Khaheli Joseph Hlalele	2025	Commercial
North West	Lichtenburg	Du Toit van der Westhuizen	Munyai Mpho	2025	Commercial
North West	Lichtenburg	Du Toit van der Westhuizen	Tshabalala Bothale	2025	Commercial
KwaZulu-Natal	Dundee	Graeme Engelbrecht	Thwala Jacob Mlungisi	2025	Potential commercial
KwaZulu-Natal	Dundee	Graeme Engelbrecht	Nzimande Boy Zakew	2025	Potential commercial
Free State	Free State	Jacques Roux	Matshnini Madina Jabulani	2025	Potential commercial
North West	Lichtenburg	Du Toit van der Westhuizen	Mtimkulu Nkosana	2025	Potential commercial
Mpumalanga	Dundee	Phumzile Ngcobo	Masango Makhaza Johannes	2025	Small holder
KwaZulu-Natal	Dundee	Graeme Engelbrecht	Khumalo Sifiso Stephanus	2025	Small holder
North West	Lichtenburg	Du Toit van der Westhuizen	Mongane Itumeleng Naphtaly	2025	Small holder
Mpumalanga	Mbombela	Jerry Mthombothi	Mnyandu Vusumuzi Simanezwi	2025	Small holder
Limpopo	Mbombela	Jerry Mthombothi	Morena Magoela Ali	2025	Small holder
KwaZulu-Natal	Dundee	Phumzile Ngcobo	Nxumalo Nhleka Joseph	2025	Subsistence
KwaZulu-Natal	Dundee	Graeme Engelbrecht	Khoza Mkhanyiselwa Msongi	2025	Subsistence
KwaZulu-Natal	Dundee	Phumzile Ngcobo	Kubheka Lindiwe Maureen	2025	Subsistence
KwaZulu-Natal	Dundee	Phumzile Ngcobo	Hlatshwayo Khabo Samaria	2025	Subsistence
Eastern Cape	Kokstad	Eric Wiggill	Gogela Nomsa	2025	Subsistence
Eastern Cape	Kokstad	Eric Wiggill	Mrwetyana Boyees	2025	Subsistence
Eastern Cape	Kokstad	Eric Wiggill	Gebhuza Fakazile	2025	Subsistence
Mpumalanga	Mbombela	Jerry Mthombothi	Mkhonza Ndinda Hezekia	2025	Subsistence
Limpopo	Mbombela	Jerry Mthombothi	Mahladi Ramashego Sarah	2025	Subsistence

The producers that win are celebrated each year at a Day of Celebration held at NAMPO Park in Bothaville.



Training course

The majority of producers who join the Grain SA/PGP study groups have limited knowledge with regards to modern agriculture and their skills in advanced maize production are therefore compromised. PGP provides training to our producers. **Table 9** indicates the courses that have been provided for 2024/2025 season.

Table 9: Training courses in the 2024/2025 season.

Donor	Course number	Name of course	Number of learners
DSI	148	Nixtamilization	2 948
FS Dept of Agri	7	Advanced Maize Production and Marketing	124
FS Dept of Agri	1	Centre Pivot Management	19
FS Dept of Agri	5	Practical Skills Course - Planter- and Boom Sprayer Calibration	83
FS Dept of Agri	2	Tractor and Farm Implement Maintenance	35
Maize Trust	2	Advanced Maize Production and Marketing	28
Maize Trust	2	Contractors Course	35
Maize Trust	13	Introduction to Maize Production	225
Maize Trust	2	Master the Art of Business Planning - for producers	25
Maize Trust	3	On-Farm Maintenance and Support (MTU)	26
Maize Trust	2	Practical Skills: Spraying and Mixing of Chemicals	26
Maize Trust	6	Practical Skills Course: Planter- and Boom Sprayer Calibration	23
Maize Trust	1	Tractor and Farm Implement Maintenance	19
OPDT	6	Introduction to Groundnut Production	88
OPDT	11	Introduction to Soyabean Production	162
OPDT	1	Introduction to Sunflower Production	7
OPDT	1	On-farm Maintenance and Support (MTU)	5
TOTAL			**930**

Pula Imvula magazine

The *Pula Imvula* magazine is a useful development communication tool. It is an exciting, multi-dimensional publication disseminating important information to the developing agricultural sector. It is well received by the producers who tell us they find the information useful and easy to understand. The *Pula Imvula* has become recognised as a reliable source of information that is tailored specifically for developing producers. Topics cover many aspects of production and marketing of specific crops as well as other generic information that is useful towards equipping and upskilling the producers.

Copies of the magazine are distributed to recipients. They are also made available online via the *www.grainsa.co.za* platform and the publication can also be emailed to recipients in digital format. Regrettably, due to the demise of the Post Office services, we are changing over to courier delivery of the magazine.



The target audience is wide, and this publication holds interest for all stakeholders interested in producer development, as well as producer development facilitators and developing producers who wish to equip themselves better. Because many of our producers live in remote deep rural areas where expert mentorship, advice and knowledge about modern farming and latest technologies and farming systems is scarce and difficult to access we believe this publication is significant. Grain SA's regional development managers, study group leaders and producers all report they find the publication invaluable.

Considering the critical importance of the role of grains in equipping South African producers, we believe our *Pula Imvula* publication has an important role to play in the developing agriculture arena. The information is published in time to address seasonal issues and create awareness of potential problems or monitoring processes which should be happening on the farm. The articles are written in easy-to-understand terms which are not intimidating to the new producer.

GRAIN SA ENTITIES

Nampo (Pty) Ltd

OVERVIEW OF COMMERCIAL ACTIVITIES

Nampo (Pty) Ltd in the Grain SA group facilitates and manages all the commercial activities of the organisation, including the NAMPO Harvest Day, NAMPO Cape, NAMPO ALFA, the events division at NAMPO Park, and the publishing of the *SA Graan/Grain* magazine. These activities are valuable assets and play an important role in the financial support of Grain SA.

The year under review was very successful. NAMPO Harvest Day improved several records, while NAMPO Cape further strengthened its position as a core event in the Western Cape with record attendance and exhibitors. NAMPO ALFA, the most recent addition to the portfolio, further strengthened its basis and is establishing itself despite challenges like the foot-and-mouth disease outbreak.

The *SA Graan/Grain* magazine once again had a strong year, with sustained advertising support and the implementation of a digital strategy that ensures future growth in the digital media space.

The function division expanded its role by not accommodating only internal but also external events. Important investments in accommodation facilities, which can now house more than 100 guests, and the development of the new caravan park, have already led to a notable increase in business activities and the utilisation of NAMPO Park.

All the commercial activities contribute to the greater aim of sustainable grain and oilseed production in South Africa. Nampo (Pty) Ltd functions at a professional level, with strategic guidance by the Nampo Board and appropriate corporate management processes in accordance with the Grain SA Constitution and the Companies Act.

NAMPO Harvest Day 2025: A year of growth, commitment and impact

The 57th NAMPO Harvest Day, presented by Grain SA from 13 to 16 May 2025 at NAMPO Park, Bothaville, achieved new heights with a record attendance of 87 191 visitors and more than 900 exhibitors. As the biggest grain-focused agricultural trade show in the southern hemisphere, its role as strategic meeting point for the agricultural value chain was strengthened by the event.



Despite challenging harvest conditions, the general sentiment among producers and exhibitors remained positive and future-oriented. NAMPO once again offered a platform for meaningful business, exchange of knowledge and the launch of innovations that support sustainable production.

High-level visits by President Cyril Ramaphosa, Deputy President Paul Mashatile and various ministers further reinforced the discussions on rural safety, infrastructure and food security during the week.

With the theme of 'Global agriculture, locally!' NAMPO highlighted the synergy between international technology and local expertise. Like Dr Tobias Doyer, CEO of Grain SA, puts it:

NAMPO once again offered a platform for meaningful business, exchange of knowledge and the launch of innovations that support sustainable production.

'NAMPO remains the heartbeat of South African agriculture – a neutral platform where producers, innovation and future-oriented discussions come together.'

NAMPO Cape 2025: Record growth and a future-oriented vision of agriculture

The sixth NAMPO Cape expo, presented at Bredasdorp Park from 10 to 13 September 2025, attracted a record number of 49 326 visitors and confirmed its position as the leading agricultural event in the Western Cape. Since the first expo in 2018, NAMPO Cape has shown sustained growth and it serves as a strategic platform where producers, businesses and policymakers collaborate to find solutions to sustainable growth.

Under the theme of 'Smart technology for effective resource management' innovative solutions were exhibited – from autonomous tractors and drones to precision irrigation and renewable energy. These demonstrations offered producers insight into technology that promotes sustainability and efficacy.

Deputy President Paul Mashatile visited the expo and emphasised collaboration in the value chain, while industry leaders like Grain SA, RPO and other commodity organisations led various strategic discussions on barley production, infrastructure and food security.

'NAMPO Cape remains a source of inspiration – a place where challenges are turned into solutions, and where the future of agriculture gains new momentum every year,' says Dr Tobias Doyer.



NAMPO ALFA 2025: A celebration of excellence, innovation and commitment

More than 8 000 visitors gathered at NAMPO Park from 16 to 18 October 2025 for the annual NAMPO ALFA expo, a dynamic gathering of South Africa's livestock, hunting and outdoors activities. The three days of competitions, technology and family activities confirmed that NAMPO ALFA is a unique platform where producers, businesses and the public can meet to share knowledge and celebrate excellence.

The expo offered three national championships, including the Old Mutual National Interbreed Beef Cattle Championships, the National Lamb Champs and the Lowveld Agrochem Agri Skills Competition, with hundreds of participants and thousands of spectators.

Dr Tobias Doyer emphasised that NAMPO ALFA reflects the spirit of growth and collaboration that drives South African agriculture.

'NAMPO ALFA brings the entire value chain together – from grain to stock, from youth training to the outdoor life. This is where the passion and progress of agriculture become visible,' says Doyer.



SA Graan/Grain: Annual overview 2025

SA Graan/Grain magazine remains the leading publication for South African grain producers, with a core focus on the sharing of knowledge, innovation and the promotion of sustainable production practices. In 2025 the magazine further strengthened its reputation as a reliable source of agricultural information by offering in-depth articles on crop control, market analysis, input strategies and technological innovation.

During the year, the magazine expanded its digital platform (*https://sagrainmag.co.za/*), which provides producers with access to real-time advice, videos and interactive articles. The integration of technological content, including precision farming, research results and resilient production methods, helped readers to improve informed decision-making at farm level.

The editorial team of *SA Graan/Grain* also placed the focus on transformation, young producers and inclusivity in the agricultural sector, which contributes to a stronger and more diverse value chain. Collaboration with Grain SA, NAMPO expos and research institutions further increased the relevance of the magazine in the industry.

In 2025 *SA Graan/Grain* proved that it is not just a publication, but a strategic instrument for producers to farm successfully, sustainably and innovatively. The role of the magazine as link between knowledge, practice and community has laid the foundation for continued growth in the coming years.

NAMPO events division: Annual overview 2025

The events division at NAMPO Park further strengthened its role as a key component of the NAMPO portfolio during the year under review. By accommodating both internal and external events, the division successfully implemented its strategy to optimally use the infrastructure at NAMPO Park. This approach contributed to the generation of sustainable revenue outside the high season of expos and other commercial events.

A significant development during the year was the important investments in accommodation facilities, which can now house more than 100 guests on the premises. This infrastructure improvement has already brought a notable increase in business activities and use of the Park, and serves as a clear investment in the long-term sustainability of the events division.

In addition, the development of the new caravan park has been completed successfully, which further increases the attraction of NAMPO Park for families and guests. The Park not only creates additional income, but also improves the general guest experience and positions NAMPO Park as a sustainable, versatile destination for the agricultural and outdoor life community.



GRAIN SA ENTITY

Commercial Producers Trust

FINANCING FOCUSED ON AGRI RESEARCH PROJECTS

In 2025, the Commercial Producers Trust successfully continued its mandate to promote the interests of all grain producers and support sustainable growth in the grain industry. The trust plays a key role in financing and coordinating research projects aimed at enhancing the productivity, resilience, and sustainability of South African grain producers.

A core function of the trust is the management of internal trust funds such as the Commercial Maize and Wheat Trust funds, which are allocated to research projects critical to producers. These projects include determining production costs, developing economic scenario analyses in collaboration with the Bureau for Food and Agricultural Policy (BFAP), as well as research related to plant health. This funding is particularly important as it is considered cofunding, opening the door for additional support from other institutions and research funds. The trust's involvement ensures that projects are not only technically feasible but also have a measurable impact on the sustainability and profitability of producers.

In addition to internal funds, the trust is responsible for coordinating external funds and projects. These projects are funded by, among others, the Department of Science and Innovation (DSI) in collaboration with the Technology Innovation Agency (TIA), as well as commodity trust funds such as the Maize Trust and the Oilseeds and Protein Development Trust (OPDT). These projects focus on key areas critical to the grain industry's sustainability, under themes including crop improvement, climate resilience, plant health, human capital, and food and nutrition security.

The trust operates within a structured administrative framework where all different streams of funding are managed and reported separately. This transparent structure ensures that each project is monitored not only on its financial management but also for its substantive impact and contribution to the long-term sustainability of producers. The trustees conduct thorough corporate oversight, focusing not only on administration but also on the practical and strategic value of projects for producers.

Grain SA's Research Coordination department plays a central role in the effective management of these projects. The department facilitates coordination between various research institutions, commodity trust funds, and producers, ensuring that project goals are simultaneously academically, practically, and economically relevant. This integrated approach strengthens collaboration between research and production, ensuring that innovations and findings are quickly and effectively implemented by producers.

> Financially, the Commercial Producers Trust successfully executed its mandate in 2025, with stable investments and transparent management processes.

Financially, the Commercial Producers Trust successfully executed its mandate in 2025, with stable investments and transparent management processes. All its projects and funds are professionally managed according to applicable corporate governance guidelines, with sustainability, accountability, and transparency as core values.

The trust reaffirms its commitment to promoting an innovative, resilient, and sustainable grain industry, where collaboration between producers, researchers, and Grain SA is critical to the long-term success of South African agriculture. Through the integration of research, practice, and strategic funding, the trust not only strengthens the current industry but also lays the foundation for the next generation of producers.

GROUP ENABLING SERVICES

Communication, Public relations and Advocacy

DRIVING CONNECTION AND INFLUENCE: GRAIN SA'S COMMUNICATION IMPACT

The 2024/2025 reporting year marked a defining period for Grain SA's Communication, Public Relations and Advocacy portfolio – a year of sharpening purpose, modernising systems, and strengthening relationships to ensure the voice of South Africa's grain producers remains clear, credible, and influential. This required strategic communication that strengthen the voice of the grain producer, informed policy, and shaped public perception in support of a sustainable and inclusive agricultural sector.

Our beneficial intent

To make Grain SA the trusted voice for grain producers by delivering relevant, impactful, and data-driven communication that informs, connects, and influences decision-making across the agricultural value chain. Grain SA's Communication, Public Relations and Advocacy Department connects people, policy and purpose through credible storytelling that builds trust, amplifies value, and gives producers a stronger, more unified voice. By communicating the relevance of grain production to South Africa's food system and economy, the team ensures that producers are heard, understood and supported across every sphere.

Our mandate

The department's mandate is to position Grain SA as the authoritative voice of South African grain producers by:

- Driving strategic, data-driven communication that informs and educates.
- Amplifying producer voices to shape public opinion and influence policy.
- Strengthening stakeholder relationships through credible, consistent messaging.
- Promoting Grain SA's brand and the role of sustainable grain production in food security.
- Building knowledgeable internal and external communities through clear, accessible information.

Where we feature

We operate across all platforms that matter – internal, member, media, and policy spaces – from the boardroom to the farmgate – bridging producers, partners, and policymakers through information that can make a difference and actions that deliver:

- Social and digital media (Facebook, X, LinkedIn, Instagram, YouTube)
- Print and broadcast (*SA Graan/Grain* magazine, radio, TV, press)
- Owned channels (websites, newsletters, WhatsApp communities)
- Public and policy spaces (events, round tables, workshops, roadshows, partnerships)

How we succeed

By being the constant and reliable source of truth on the relevance of grain production. Through compelling storytelling, thought leadership and proactive advocacy, the department:

- Gives grain producers a stronger, unified voice.
- Delivers consistent, credible and inclusive communication that informs, educates and connects.
- Influences public discourse and policy through evidence and empathy.
- Strengthens the Grain SA brand by shaping narratives that reflect resilience and innovation.

Driving connection, influence and advocacy

WHAT IT IS

This portfolio drives Grain SA's voice, visibility, and influence. It ensures that the organisation's advocacy, events, and media engagement operate in unison – amplifying the value of the grain producer, building trust in the brand, and reinforcing the link between research, economics, and farmer development.

WHY IT IS IMPORTANT

Producers face mounting pressures: climate volatility, input cost escalation, infrastructure uncertainty, and policy transitions. In such a dynamic environment, Grain SA's credibility and influence depend on consistent, fact-based, and empathetic communication. Effective advocacy is impossible without a strong narrative, and strong narratives depend on proactive communication.

WHO IS INVOLVED

The Communication and PR team, supported by leadership, departmental heads, and spokespeople, works together with media partners, policymakers, and agricultural stakeholders. Every unit (Economics, Research, PGP, NAMPO, Marketing, and Membership) contributes insights that shape messaging, ensuring that Grain SA speaks with one informed voice.

ACTION HIGHLIGHTS 2024/2025

STRATEGY WITH STRUCTURE

A structured planning cycle embedded accountability and agility in how we communicate.

- **Programmatic communication:** The team adopted a structured 90-day planning rhythm aligning all campaigns and content with quarterly strategic themes.
- **Message alignment:** Established unified messages across departments which guided tone and timing across platforms, enabling consistency and clarity.
- **Content planning:** Implemented a live content plan, ensuring alignment with Grain SA's quarterly themes and real-time industry developments and enabling real-time scheduling and measurement of reach and engagement.
- **Outcome:** Greater campaign rhythm and message coherence, reflected in improved audience engagement and stakeholder recall.

ADVOCACY THROUGH COMMUNICATION

Communication and advocacy were integrated as one function – using information to influence policy, protect producer interests, and position Grain SA as an evidence-based industry leader.

- **Proactive stakeholder communication:** Deployed WhatsApp groups, newsletters, and direct advisories to share targeted time-sensitive updates with members
- **Advocacy integration:** Embedded advocacy themes into media releases and spokesperson briefings – ensuring consistent narrative reinforcement around tariffs, input costs, market access, and climate resilience.

BUILDING SYSTEMS AND DIGITAL REACH

The year saw foundational digital infrastructure work:

- **New unified website:** Development of a redesigned Grain SA site and integration of NAMPO, NAMPO Cape, NAMPO ALFA and Grow for Gold platforms under a cohesive, accessible brand identity.
- **Central Contact Register (CCR):** Progressed towards establishing a fully automated system to manage member, media, and stakeholder contacts.
- **Data-driven monitoring:** Media reporting guidelines were introduced to track reach, sentiment, issue and advocacy traction per department, enabling evidence-based reporting to management – a first for Grain SA.

MEDIA, PUBLIC RELATIONS AND REPUTATION MANAGEMENT

Strategic media engagement ensured that Grain SA retained a strong, respected public voice:

- **Media relations:** Reframed around advocacy themes such as input cost pressure, trade and tariff protection, and climate resilience.
- **Media networking:** Media database cleaning, new partnerships through online databases, and regular networking contact improved efficiency and response times.
- **Positive visibility:** Regular spokesperson visibility (CEO's, economists, research leaders) positioned Grain SA as a credible source on sector performance and policy commentary.
- **Outcome:** Consistent positive/neutral sentiment and broadened thematic visibility around farmer recognition, transformation, and resilience.

EVENTS AS PLATFORMS FOR INFLUENCE

Grain SA's events continued to serve as high-impact vehicles for communication, relationship-building, and advocacy:

- **Benefiting:** Sustained coverage across broadcast, print, and online platforms during flagship events – including Congress, NAMPO, Day of Celebration and the Grain Producer of the Year Awards – reinforced Grain SA's credibility.
- **NAMPO**, **NAMPO Cape**, and **NAMPO ALFA** expanded engagement across value chain players.
- **Grow for Gold, Day of Celebration, and Grain Producer of the Year Awards** showcased transformation, innovation, and leadership within grain production.
- The communication team ensured brand alignment, storytelling depth, and multi-channel coverage before, during, and after each event – extending their impact beyond attendance.

IMPACT HIGHLIGHTS 2024/2025

- A measurable improvement in message consistency and response agility across channels.
- Strengthened confidence among journalists and policymakers in Grain SA as a credible information source.
- Improved visibility of leadership and experts in the national dialogue on agricultural resilience.
- A data-driven foundation for planning and accountability, linking communication effort to organisational outcomes.

QUARTERLY 90-DAY IMPACT HIGHLIGHTS

Q1 (October-December 2024): Laying the foundation

The focus was on structure – establishing systems, data flow, and alignment across all communication channels. A clear, organised framework was needed to ensure consistency across multiple platforms and departments. The communication team collaborated with internal departments (Research, Economics, PGP, and Marketing) and the CEO's office.

Actions	Outcomes
■ Developed the 2025 Communication Content Plan, plotting all Grain SA themes and advocacy focus areas. ■ Updated regional media databases to enhance regional targeting. ■ Implemented systems for social-media scheduling and measurement. ■ Initiated collaboration meetings with departmental heads to align quarterly messaging.	■ A fully functional, system-driven communication calendar. ■ Improved interdepartmental collaboration on messaging priorities. ■ Established a baseline for analytics and tracking going forward.

Q2 (January-March 2025): Building systems and insight

This quarter focused on the transition from planning to execution; refining channels and ensuring data-driven decision-making to measure communication value accurately and demonstrate tangible impact to leadership. Drafting the message house framework across departments to ensure coherent advocacy language.

Actions	Outcomes
■ Rolled out the message house framework across departments to ensure coherent advocacy language. ■ Conducted training sessions on content planning and analytics interpretation. ■ Began testing new monitoring metrics for media coverage and sentiment tracking. ■ Hosted a workshop on channel purpose and value, ensuring each digital platform served a defined role.	■ Enhanced ability to interpret and act on media data. ■ Cohesive messaging across press releases, interviews, and social channels. ■ Strengthened media relationships and more frequent journalist engagement.

Q3 (April-June 2025): Integration and reach

The focus was on driving unification across platforms and deepen stakeholder engagement to remove duplication, strengthen the Grain SA identity, and improve visibility before NAMPO season.

Actions	Outcomes
■ Unified all Grain SA social channels under consistent branding and tone. ■ Advanced the Central Contact Register (CCR), consolidating member and stakeholder databases. ■ Initiated framework discussions for WhatsApp communities, to provide a direct broadcast link to members. ■ Prepared advocacy content for NAMPO and mid-year media briefings. ■ Began defining media monitoring dashboards per department, tracking media and sentiment.	■ Stronger brand consistency across owned platforms. ■ Increased audience engagement ahead of flagship events. ■ Improved access to segmented member information for targeted communication.

Q4 (July-September 2025): Delivery and visibility

This quarter focused mainly on translating systems into high-impact storytelling and advocacy visibility to demonstrate how communication converts into influence – particularly during high-profile events and media cycles.

Actions	Outcomes
■ Started developing personalised dashboards per department for live analytics reporting. ■ Finalised redesign of the Grain SA website, unifying sub-brands (NAMPO, NAMPO Cape, NAMPO ALFA, Grow for Gold) on one modern interface. ■ Strengthened advocacy linkages between communication and leadership messaging around agro-chemicals, tariffs, climate resilience, production outlooks and market trends. ■ Produced internal data-storytelling infographics for Board and member reporting.	■ Enhanced analytical visibility and evidence-based communication. ■ Higher-quality, timely content production at field level. ■ A modern, accessible digital home for all Grain SA audiences. ■ Clear alignment between communication output and advocacy outcomes.

IN SUMMARY

Communication, PR and Advocacy have become enablers of influence rather than afterthoughts of activity. Grain SA's narrative is now strategic, measurable and intentional – moving beyond information sharing to purposeful storytelling that defends, promotes and advances the interests of South Africa's grain producers.

Media, advocacy and reputation outcomes

WHAT IT IS

Grain SA's media and advocacy strategy ensures that every public engagement supports producers' interests while building the organisation's reputation as South Africa's trusted agricultural voice. Communication, PR, and Advocacy work together to influence national conversations on food security, market access, and sustainability.

WHY IT IS IMPORTANT

Credibility and visibility are the currency of advocacy. Every radio interview, TV insert, press article, and digital post shapes public and policy perception of the agricultural sector. For Grain SA, maintaining this visibility and reputation translates directly into influence – ensuring that grain producers' perspectives reach decision-makers and the broader public.

WHO IS INVOLVED

The communication team collaborates with Grain SA's leadership, economists, researchers, and farmer representatives who serve as spokespersons. External stakeholders include media outlets, journalists, editors, and industry partners. Advocacy efforts are supported by the CEO, departmental heads, and communication staff ensuring message discipline.

ACTIONS

- **Proactive media engagement:** Maintained active relationships with journalists and editors through targeted briefings, event access, and fact-based press releases.
- **Thematic storytelling:** Tied media activity to advocacy themes – agro-chemicals, tariffs, input costs, transformation, technology adoption, and climate resilience – ensuring every headline reinforced Grain SA's strategic position.
- **Spokesperson visibility:** Coordinated interviews, commentary, and opinion pieces for key Grain SA representatives across print, broadcast, and online platforms.
- **Media monitoring and analytics:** Implemented tools & systems for live tracking of reach, sentiment, and issue share of voice.
- **Crisis readiness:** Developed rapid-response protocols for misinformation or reputational risks, ensuring coordinated and factual communication.
- **Member-focused content:** Produced consistent updates through newsletters and WhatsApp communities, keeping producers informed and engaged.

OUTCOMES

- Consistent visibility across mainstream and agricultural media, with a positive or neutral sentiment profile exceeding 90%.
- Total reach of 11,86 million across platforms, driven by proactive event coverage and policy commentary.
- Over 4 700 media items published during the year, reflecting a growth in engagement and share of voice.
- Spokesperson presence in major national outlets strengthened Grain SA's position as a credible and trusted sector authority.
- Media coverage themes aligned closely with advocacy priorities: transformation, market access, trade protection, and food security.
- The media monitoring analytics rollout provided tangible, reportable metrics to the Board – linking media exposure directly to strategic outcomes.

IN SUMMARY

The Communication and Advocacy function has matured into a proactive, data-driven and credible influence engine. Media relations are no longer reactive – they are strategic tools for agenda-setting. Each article, interview, or post now reinforces one central truth: South African grain producers are essential to national stability, food security, and economic growth. Continuous monitoring and performance evaluation remained central to communication planning. Through daily media tracking, sentiment analysis, and integrated dashboards, the team ensured real-time responsiveness and data-backed reporting to leadership.

Media visibility and advertising value equivalent (AVE) performance

Grain SA's media presence continues to play a critical role in fostering public awareness of its work and advocating for the interests of South Africa's grain producers. Recognising the media as a key stakeholder, the organisation maintains active engagement across print, broadcast, online, and social platforms to ensure accurate, timely and impactful representation of its advocacy priorities.

In 2025, Grain SA adopted a refined, data-driven media strategy to improve message precision and efficiency. By analysing performance across channels and consolidating outreach efforts, the team ensured that every communication delivered measurable value to both members and the public.

Press releases, interviews, and features resulted in sustained national coverage, achieving an **Advertising Value Equivalent (AVE)** of **R152 879 861,** up from **R133 036 542** in the previous reporting period. These figures represent what Grain SA would have spent to purchase equivalent paid advertising space or airtime. Evaluating coverage in this way provides a clear indication of the organisation's media impact and return on communication investment. By leveraging strong media relationships and optimising content placement, Grain SA strengthened its credibility as a trusted voice on agricultural issues, while amplifying producers' perspectives on resilience, innovation, and sustainability.

Grain SA's advertising value equivalent spend.

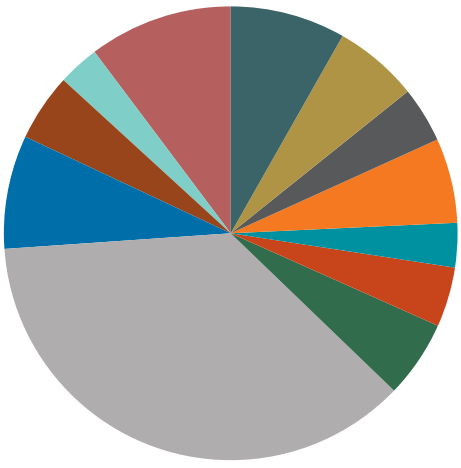
[R152 879 861]
up from R133 036 542 last year

[R69 382 497]
Up from R63 626 637 last year

[R33 594 711]
Up from R30 372 681 last year

[R49 902 653]
Up from R39 037 225 last year

Month-on-month media coverage.



8,21%	October 2024
6,04%	November 2024
3,97%	Desember 2024
6,04%	January 2025
3,16%	February 2025
4,26%	March 2025
5,52%	April 2025
36,71%	May 2025
8,09%	June 2025
4,81%	July 2025
2,95%	August 2025
10,26%	September 2025

Social media and digital engagement

Grain SA's social media platforms remain a key extension of its communication and advocacy efforts – connecting directly with producers, partners, and the broader agricultural community. Over the reporting period, activity and engagement across all platforms grew significantly, reflecting the organisation's success in building a vibrant, interactive online presence.

Social media continues to be the fastest, most accessible channel for information sharing and advocacy. Through daily interactions, Grain SA fosters a sense of community among producers, delivering informative content, timely updates, and interactive discussions that build trust and awareness. This presence allows Grain SA to communicate industry changes quickly, respond to member needs, and strengthen its position as a trusted, influential information hub for the grain sector.

The Communication and PR team, in collaboration with the Economics, Research, PGP, and NAMPO divisions, coordinated content across multiple official channels:

Facebook, Instagram, X (Twitter), LinkedIn, YouTube, and sub-branded pages for **NAMPO Harvest Day**, **NAMPO Cape**, **NAMPO ALFA**, ***SA Graan/Grain***, and **PGP**.

Actions:

- Implemented a **data-led content strategy**, refining tone, format, and frequency to match audience behaviour and platform algorithms.
- Produced **educational, advocacy, and event-driven content**, including real-time updates from Congress, NAMPO, and Grow for Gold.
- Expanded **cross-platform collaboration**, ensuring that major themes – climate resilience, producer recognition, transformation, and innovation – were consistently represented across all channels.
- Enhanced **visual storytelling** through short videos, infographics, and member highlights to boost engagement and reach.
- Introduced **community management protocols** to ensure fast responses to enquiries and feedback on all platforms.

Outcomes:

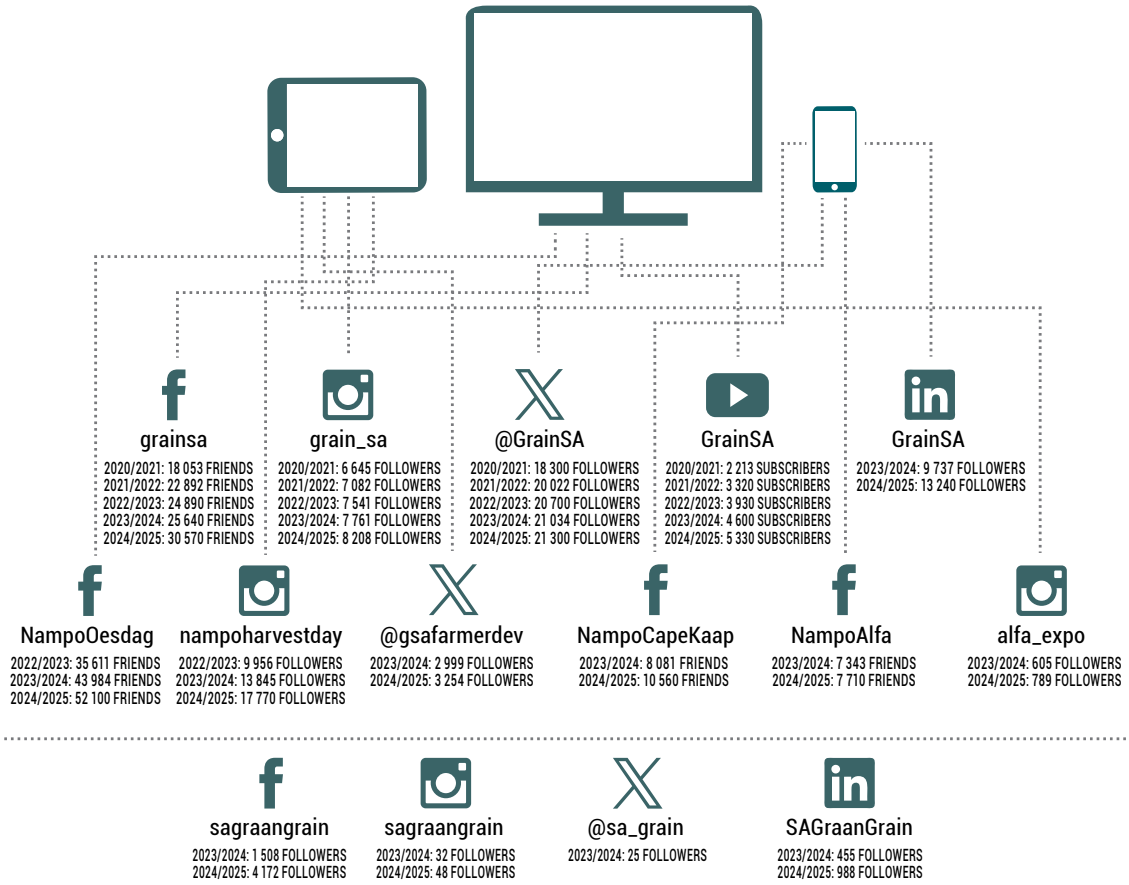
- Grain SA's consolidated digital community grew to 176 303 total followers across platforms, representing a 19% year-on-year increase.
- Platforms with the highest growth included:
  - **Facebook:** up 22% across all Grain SA, NAMPO, and *SA Graan/Grain* accounts.
  - **Instagram:** 26 815 followers, growing steadily through educational and behind-the-scenes content.
  - **X (formerly Twitter):** 24 554 followers, maintaining strong advocacy engagement with stakeholders and policymakers.
  - **LinkedIn:** 14 410 followers, positioning Grain SA as a thought leader in sustainable and transformative agriculture.
- Average engagement rate increased by 32%, driven by richer multimedia and real-time coverage of key events.
- Digital presence now spans more than **16 branded profiles** across Grain SA, PGP and NAMPO sub-entities, reinforcing consistent brand identity and accessibility.

Through a coordinated and data-driven digital strategy, Grain SA continues to expand its influence and engagement online. By balancing advocacy, education, and storytelling, the organisation ensures that producers' voices are heard, not just in the media, but in the dynamic digital spaces where public opinion and policy narratives are shaped.

Digital communication and knowledge platforms

Grain SA's print and digital publications continue to serve as authoritative resources and storytelling platforms, translating technical insight into accessible, practical guidance for producers at every level. Through consistent, credible, and inclusive content, Grain SA's publications not only share knowledge – they shape understanding. They reflect the organisation's values of excellence, transformation, and empowerment, offering tangible tools to support sustainability and profitability on-farm.

Grain SA's social and digital media platforms.



Actions:

- *SA Graan/Grain* magazine continued as the official voice of Grain SA, expanding readership and editorial depth to cover sustainability, technology adoption, and economic insight.
- *Pula Imvula*, Grain SA's multilingual publication, provided monthly education and mentorship content for developing and emerging producers – promoting inclusive participation in commercial agriculture.
- The annual ***Grain Guide*** remained a key producer resource, offering comprehensive reference material on inputs, seed selection, crop management, and financial planning – supported by an updated agricultural calendar and industry directory.
- Integrated print and digital storytelling across all three publications, aligning content themes with advocacy messages and sector priorities
- Promoted cross-platform visibility by linking magazine features to social and digital campaigns, extending reach beyond traditional print audiences.
- Maintained continuous updates across the Grain SA, NAMPO, NAMPO Cape, NAMPO ALFA, and Grow for Gold websites, ensuring that each platform reflected the latest initiatives, event highlights, and collaboration updates with government, academia, and industry stakeholders. This ongoing web maintenance reinforced Grain SA's role as a reliable, always-on information hub for the grain industry.

Outcomes:

- Issues of *SA Graan/Grain* and *Pula Imvula* were produced and distributed, reaching an estimated 30 000 readers monthly.
- Year-on-year growth in reader engagement and digital readership.
- Strengthened link between publications and Grain SA's broader advocacy and member-education strategy.
- Enhanced brand presence through visually refreshed design and thought-leadership content.

Grain SA's communication ecosystem – from real-time electronic updates to in-depth print publications – continues to build a well-informed, connected producer community. Together, these platforms uphold Grain SA's role as **a voice of authority, a source of truth, and a partner in progress** for South Africa's grain industry.



MARKETING AND BRAND COMMUNICATION

Throughout the reporting period, Grain SA continued to produce and distribute branded communication materials and corporate items that reinforced the organisation's visual identity and connection with members, sponsors, and stakeholders. These assets were strategically deployed at key events, including Congress, NAMPO, NAMPO Cape, NAMPO ALFA, and Grow for Gold, ensuring consistent brand visibility and alignment with Grain SA's renewed value proposition. The focus on cohesive, professional branding strengthened Grain SA's presence across all public touchpoints, enhancing engagement and reinforcing trust with members, partners, and policymakers.

Events as strategic platforms

Grain SA's events remain cornerstone moments in the organisation's annual communication calendar. They are not only celebration and networking platforms but also key advocacy touchpoints that connect producers, partners, policymakers, and the public around shared priorities of food security and agricultural growth.

NAMPO ALFA 2024 – EXPANDING HORIZONS FOR LIVESTOCK, HUNTING AND OUTDOOR INDUSTRIES

NAMPO ALFA 2024 marked the third presentation of South Africa's premier livestock, hunting and outdoor expo, held from 17 to 19 October 2024 at NAMPO Park, Bothaville. The event united the livestock, hunting, mechanisation, and outdoor lifestyle sectors under one platform, offering a comprehensive showcase of equipment, expertise, and innovation. The expo reaffirmed Grain SA's role as a connector across agricultural value chains. It provided a vital space for interaction between large-scale and small-scale producers, highlighting **diversification, sustainability, and inclusive growth** in the red-meat and outdoor economy. The 2024 edition underscored Grain SA's commitment to promoting profitable, responsible, and future-fit farming practices.

Grain SA and ALFA Events partnered with the Red Meat Producers' Organisation (RPO), RMIS, NaLFA-SA, Sernick, SA Studbook, Landbouweekblad, and Nexus & Agri Voice. Supported by numerous sponsors, exhibitors and industry stakeholders, the event attracted more **than 8 500 visitors** and featured over **282 exhibitors** across livestock, outdoor, and mechanisation industry.

Actions	Outcomes
■ Introduced an expanded programme including the RPO National Congress, Small-Scale Beef Cattle Producers Conference, and Land Bank Livestock Transformation Conference. ■ Hosted the first Lucerne Expo and a new Mechanisation Pavilion showcasing feed-milling, baling, and transport technology. ■ Partnered with SA Studbook and *Landbouweekblad* to launch the Livestock Academy – a knowledge platform for profitable herd management. ■ Curated the Hunting & Outdoor programme, featuring a treasure hunt, Hinterland shooting range, Fortis shooting training, 4×4 test-drives, motorbike skills shows, drone demonstrations, and family-friendly entertainment.	■ Positive media sentiment exceeding **339 media mentions**, reflecting the growing national relevance of livestock and outdoor integration. ■ Record participation across livestock championships, outdoor demonstrations, and educational sessions. ■ Strengthened collaboration between Grain SA, RPO, and emerging-farmer structures, aligning with national transformation goals. ■ Reinforced Grain SA's position as a catalyst for connection – bridging crop and livestock industries while promoting sustainable and inclusive agricultural development.

Actions	Outcomes
■ Promoted transformation through the Sernick Carcass Competition, NaLFA-SA Farmers' Dialogue, and Land Bank Small-Scale Livestock Conference, highlighting inclusive participation in the red-meat value chain. ■ Delivered daily live coverage, exhibitor interviews and behind-the-scenes content for social media, achieving reach of two million across platforms.	

GRAIN PRODUCER OF THE YEAR AWARDS 2024 – CELEBRATING LEGACY, LEADERSHIP, AND RESILIENCE

The 26th Annual Grain SA Gala Awards, held on Friday, 1 November 2024, at the Birchwood Hotel and Conference Centre, marked a milestone moment in South African agriculture – celebrating 25 years of honouring grain producers who exemplify innovation, leadership, and excellence. Under the theme 'Honouring the Heart of Agriculture: Role Models Inspiring the Future,' the event recognised the enduring contribution of South Africa's grain producers to food security, rural development, and industry advancement.

The awards showcased how resilience, innovation, and mentorship sustain the agricultural sector. It provided a national platform to honour the perseverance and excellence that define South African grain production. For Grain SA, the event underscored the belief that role models matter – producers who overcome adversity, inspire transformation, and lead with integrity pave the way for sustainable, inclusive growth in agriculture. The event brought together emerging and commercial grain producers, sponsors, government officials, agribusiness leaders, industry partners, and media.

Actions	Outcomes
■ Crafted a comprehensive communication campaign around the 25-year heritage of the awards, celebrating producers who embody innovation and stewardship. ■ Highlighted the evolution of the awards – from Maize Man of the Year (pre-2000) to the inclusive Grain Producer of the Year awards – showcasing 25 years of growth and transformation. ■ Incorporated a special tribute to past winners, including a moment of remembrance for those who have passed on underscoring the depth of legacy within the agricultural community. ■ Recognised and celebrated developing farmers through the Day of Celebration, representing Subsistence, Smallholder, Potential Commercial, and New Era Commercial categories – affirming Grain SA's transformation commitment. ■ Coordinated multimedia content and speeches highlighting transformation, mentorship, and excellence. ■ Managed real-time event coverage across print, broadcast, and digital platforms, as well as a post-event media session hosted by Grain SA's communication team for winners and sponsors.	■ Strong attendance from across the agricultural value chain, representing 368 attendees, and notable participation from emerging producers. ■ Generated 111 media mentions; reaching 4,98 million across national, trade, and social media platforms. ■ Achieved positive sentiment exceeding 89%, reinforcing Grain SA's image as a trusted voice for agriculture. ■ Reaffirmed Grain SA's role as the bridge between commercial and developing farmers – promoting inclusivity and shared growth. ■ Honoured excellence through the presentation of the **2024 Grain SA/Syngenta Grain Producer of the Year Award** to **Michael and Gareth Allen of G&M Farming Enterprises, Middelburg, Mpumalanga**, recognised for their precision, innovation, and sustainability in grain production. ■ Strengthened key partnerships and reaffirmed sponsor confidence in the awards as a premier platform for industry recognition.

In essence, the 2024 Awards were not just a celebration of yield, but a reflection of values – legacy, mentorship, and resilience. By honouring South Africa's finest producers and highlighting the collective strength of both established and developing farmers, Grain SA continues to elevate the standard of excellence in South African agriculture.

GRAIN SA CONGRESS 2025 – LEADERSHIP AND POLICY DIALOGUE

The 2025 Grain SA Congress, held from 12 to 13 March 2025 at NAMPO Park, Bothaville, brought together South Africa's leading grain producers, policymakers, agribusiness leaders, and industry experts under the theme 'A producer's journey: From surviving to thriving.' The annual Congress remains Grain SA's premier governance and policy platform, where members set the strategic course for the organisation and engage in dialogue on the issues shaping South African agriculture.

The Grain SA Congress serves as the industry's most influential platform for collective decision-making, ensuring that producers' voices are central in shaping policy and advocacy priorities. In 2025, the discussions underscored the industry's evolution from navigating volatility to building resilience and growth – reaffirming the organisation's role as the trusted, unified voice of South African grain producers.

Delegates from all nine provinces, Grain SA's Board and Management teams, and numerous industry stakeholders attended the event. Government participation included Minister of Agriculture John Steenhuisen, who addressed the Congress, alongside outgoing Chairperson Derek Mathews and newly elected Chairperson Richard Krige, joined by Vice-Chairs Danie Minnaar and Jeremia Mathebula. International insight was provided by Paul Temple, UK grain producer and vice-chairperson of the Global Farmer Network, while corporate partners such contributed thought leadership on innovation and technology.

Actions	Outcomes
■ Prepared and distributed advocacy briefs and policy toolkits to delegates and speakers, equipping them with data-driven insights on tariffs, land reform, rural safety, and climate resilience. ■ Delivered daily Congress communication to members via digital channels (WhatsApp, social media, and newsletters), ensuring transparent information flow. ■ Coordinated media engagement and on-site interviews with key leadership figures, ensuring consistent message discipline around policy, markets, and innovation. ■ Managed press coverage highlighting the leadership transition from Derek Mathews to Richard Krige, with clear continuity in vision and advocacy. ■ Supported live panel discussions on financial resilience, long-term planning, market trends, and innovation – aligning content with Grain SA's strategic advocacy pillars. ■ Produced and disseminated real-time policy announcements and post-Congress press statements through Grain SA's communication channels and mainstream media.	■ Strong attendance from across the agricultural value chain, with delegates representing every region and commodity group. ■ Enhanced visibility of Grain SA's advocacy voice through 79 media items across national, broadcast, and agricultural press. ■ Positive sentiment exceeding 76%, driven by strong leadership messaging on resilience, unity, and innovation. ■ Published key policy commitments from the Minister of Agriculture on land reform transparency, rural safety, tariff adjustment acceleration, and biosecurity strengthening. ■ Successful leadership transition, reaffirming Grain SA's institutional stability and continuity of purpose. ■ Communication elevated international and innovation dialogue through contributions from Paul Temple (Global Farmer Network) and Todd Heap (Bayer Global Corn Strategy Lead) on sustainability and technological adoption in maize production.

In summary, the 2025 Congress reaffirmed Grain SA's central role in shaping the future of agriculture – moving the conversation from short-term survival to long-term sustainability. It highlighted that resilience in farming is built through partnership, knowledge-sharing, and continued advocacy. By uniting producers, policymakers, and industry under one roof, Congress 2025 strengthened Grain SA's capacity to influence policy and champion the prosperity of South African grain producers.

NAMPO 2025 – GLOBAL AGRICULTURE, LOCALLY ROOTED

The 57th NAMPO Harvest Day, held from 13 to 16 May 2025 at NAMPO Park, Bothaville, once again confirmed its status as Africa's largest and most influential agricultural exhibition. With a record 87 191 visitors and over 900 exhibitors, the 2025 edition brought the world of agriculture together under the theme 'Global agriculture, locally!' – reflecting the growing intersection between international innovation and local adaptation.

NAMPO is more than an exhibition – it's a space for dialogue, innovation, and connection. As global agriculture evolves, the 2025 theme underscored how South African producers are part of a worldwide network of knowledge, yet deeply rooted in local conditions. The event demonstrated how collaboration between producers, agribusiness, and government can strengthen resilience, competitiveness, and sustainability across the value chain.

The 2025 event saw notable representation from Government, with visits from President Cyril Ramaphosa, Deputy President Paul Mashatile, Minister John Steenhuisen (Agriculture), and Minister Dean Macpherson (Public Works and Infrastructure). The presence of cabinet members, five provincial MECs, and numerous international delegations from the USA, UK, Turkey, Argentina, and Brazil reflected NAMPO's growing global footprint.

Actions	Outcomes
■ Grain SA delivered the 2025 NAMPO Harvest Day under the theme 'Global agriculture, locally!', showcasing global technologies adapted for South African producers. ■ The programme introduced new experiences including the Santam Grain SA Museum, KamersMakers showcase, expanded ALPHA Insure Women's Programme, and a new caravan park with 100 powered stands. ■ Ensured continuity and accessibility despite heavy rains before the event – implementing extensive ground drainage, infrastructure maintenance, and real-time updates through Grain SA's platforms. ■ Managed integrated communication before, during, and after the event – coordinating media across print, digital, and broadcast platforms to ensure consistent messaging. ■ The team facilitated engagement between producers, agribusinesses, and government on key issues including rural safety, infrastructure maintenance, input cost pressures, and technology adoption. ■ Strengthened advocacy visibility through Nation in Conversation dialogues, focusing on biosecurity, trade access, climate adaptation, and producer profitability. ■ Delivered proactive media management, press releases, and on-site spokesperson interviews – amplifying Grain SA's leadership voice and the event's relevance. ■ Grain SA coordinated VIP and international guest relations, ensuring NAMPO Park functioned as an inclusive platform for both business and policy dialogue.	■ **87 191 visitors**, **900+ exhibitors**, **and record-breaking aviation traffic** with 377 aeroplanes and 69 helicopters during the week. ■ Over **6 537 media items with a reach of 217 million** across national, international, and sector media, with a **positive sentiment exceeding 70%**. ■ Political and industry leaders reaffirmed agriculture's role as a national economic driver, with commitments on **rural safety, infrastructure repair, and investment in agricultural innovation**. ■ Grain SA reaffirmed its credibility as a neutral, apolitical facilitator of engagement, positioning NAMPO as the definitive meeting point for producers, policymakers, and investors. ■ The event's tone was optimistic – despite weather and market challenges, NAMPO 2025 showcased the **resilience, unity, and adaptability** of South African farmers.

In essence, NAMPO 2025 encapsulated the best of global and local agriculture – where innovation met heritage. The event's scale, diversity, and dialogue positioned Grain SA not only as a host but as a custodian of agricultural progress, uniting grain producing members and 80 000 visitors in a shared purpose: to secure the future of farming, from soil to silo.

SWARTLAND SHOW 2025 – REGIONAL ENGAGEMENT AND VISIBILITY

Grain SA participated in the **Swartland Agricultural Show**, held in **Moorreesburg** from 3 to 6 September 2025, strengthening the organisation's footprint in the Western Cape. The event's theme, *'Boerdery se Toekoms: Ons skei die koring van die kaf,'* framed a producer seminar focused on unpacking the future of grain farming in the region. Regional shows like Swartland provide crucial opportunities to connect directly with producers, engage local media, and foster dialogue about the realities of grain production in the Western Cape. It reinforces Grain SA's presence in one of South Africa's key wheat-producing regions, while also building visibility for membership, research, and advocacy initiatives among coastal producers.

The event was supported by Grain SA's Western Cape regional and communication teams and regional partners including local media outlets and producer organisations. A highlight of the show was the Producer Seminar, moderated by financial expert Theo Vorster, featuring a dynamic panel of industry specialists who discussed the challenges and opportunities shaping the future of grain farming.

Actions	Outcomes
■ Grain SA co-hosted the 'Boerdery se Toekoms' producer seminar, facilitating expert discussions on market volatility, climate resilience, and innovation. ■ Delivered on-site member engagement through the Grain SA member's tent – answering membership queries, distributing materials, and strengthening relationships with producers in attendance. ■ Provided targeted print and digital content spotlighting regional issues, including wheat production, input costs, and producer profitability. ■ Coordinated media interactions to highlight Grain SA's advocacy work and promote the producer seminar theme across Western Cape agri-media.	■ Grain SA expanded local membership engagement and deepened relationships with existing members in the Swartland region. ■ Generated various media inserts through regional newspapers, radio, and online coverage. ■ Reinforced Grain SA's image as a credible and accessible industry voice for Western Cape grain producers. ■ Grain SA strengthened partnerships with local stakeholders and improved visibility of national advocacy priorities at regional level.

NAMPO CAPE 2025 – SMART TECHNOLOGY FOR EFFICIENT RESOURCE MANAGEMENT

The sixth NAMPO Cape expo, held from 10 to 13 September 2025 at Bredasdorp Park, drew a **record-breaking 49 326 visitors** and more than **450 exhibitors**, confirming its position as the Western Cape's leading agricultural showcase. Presented by Grain SA and Bredasdorp Park NPC, the 2025 edition focused on the theme 'Smart technology for efficient resource management' – spotlighting innovation that helps producers increase efficiency, reduce waste, and strengthen sustainability.

NAMPO Cape has become a catalyst for growth and resilience in the winter grain region. It connects producers, agribusinesses, policymakers, and the wider community in a space that blends innovation, tradition, and transformation. The 2025 event demonstrated how cutting-edge technology, from autonomous machinery and AI to precision irrigation and renewable energy systems, is reshaping farming in a climate-stressed environment – proving that "smart technology" is no longer optional, but essential.

High-level government and sector participation included Deputy President Paul Mashatile, Western Cape Minister of Agriculture Dr Ivan Meyer, and representatives from AgriSA, Absa, Land Bank, ARC, SA Wine, SA Olive, Syngenta, and SABI. The Deputy President's visit emphasised partnerships and collaboration within the value chain as critical to national food security.

Actions	Outcomes
■ Grain SA and Bredasdorp Park NPC delivered the 2025 expo under the theme *Smart Technology for Efficient Resource Management*, focusing on the integration of innovation and sustainability.	■ Record attendance of **49 326 visitors** – surpassing 2024's 45 894 and representing sustained regional growth.

Actions	Outcomes

■ Curated a diverse programme that included:
  ▪ The Grain SA Barley Industry Panel, highlighting new opportunities for diversification, with Soufflet announcing a R2 billion investment in a new malthouse at Sedibeng.
  ▪ The return of the BKB Merino Classic and the first National Merino Fleece Show, celebrating wool excellence and bio secure breeding practices.
  ▪ The International Tentpegging Test between South Africa and Australia, hosted in the upgraded Western Cape Lubricants Arena.
  ▪ Working Dog demonstrations, Mounted Games, and Mounted Archery – reflecting the cultural heritage of agriculture.
  ▪ The Santam Women's Programme featuring artists like Bok van Blerk, Jo Black, and Andriëtte Norman, and the Overberg Youth Show, drawing participation from 19 schools.
■ Grain SA hosted the Deputy President's stakeholder dialogue, reinforcing national-level engagement with Grain SA's policy and advocacy priorities.
■ Partnered with exhibitors showcasing AI-enabled irrigation, IoT livestock monitoring, and renewable energy innovations – connecting theory with field-level application.
■ The Organising Committee expanded parking, introduced on-site tented accommodation for 150 guests, and launched the Neptun Deli to enhance visitor experience.
■ Implemented a robust communication plan, ensuring high media visibility before, during, and after the event through national, regional, and digital platforms.
	■ More than 1 500 media mentions with a reach of 66,76 million with positive sentiment exceeding 62%, highlighting both innovation and community spirit.
	■ Strengthened Grain SA's reputation as a leader in promoting climate-smart and inclusive agriculture.
	■ Provided a tangible boost to the Overberg economy, with full accommodation occupancy, busy restaurants, and seasonal job creation.
	■ Reinforced NAMPO Cape's identity as both an innovation hub and a community celebration – showcasing resilience amid drought conditions in the winter rainfall areas.
	■ Deepened partnerships between producers, agribusiness, and government, ensuring sustained advocacy visibility for the grain and livestock industries.

In summary NAMPO Cape 2025 captured the spirit of modern agriculture – innovation anchored in tradition. It strengthened Grain SA's influence and visibility in the Western Cape, highlighted the value of collaboration, and demonstrated that smart, efficient resource management is key to securing the future of farming in South Africa.

GROW FOR GOLD 2025 – CELEBRATING RECORD-BREAKING YIELDS AND PRODUCER EXCELLENCE

The sixth annual Grow for Gold Awards, held on 25 September 2025, once again honoured South Africa's top-performing grain producers – recognising excellence in yield, innovation, and sustainable production. The competition, managed by Grain SA, celebrates producers who achieve exceptional yield results across maize, sunflower, wheat, and soybean categories, showcasing the technical progress and resilience of South African grain farming.

Grow for Gold is more than a yield competition; it reflects South African producers' adaptability and innovation in the face of changing climatic conditions. The 2025 awards demonstrated how advanced genetics, soil health management, and precision agriculture are propelling national food security. By benchmarking performance, sharing best practices, and celebrating success, the initiative reinforces Grain SA's commitment to excellence and sustainable productivity across all farming scales with participation from producers across the country, representing every major production region and irrigation zones.

Actions	Outcomes

■ Grain SA managed a nationwide benchmarking process across all participating regions, incorporating scientific evaluation of yield data, cultivar performance, and production practices.
■ Coordinated press releases, photo assets, and multimedia content highlighting record-breaking achievements and the innovation behind them.
■ Facilitated interviews and expert commentary from Grain SA's leadership, agronomists, and winners, linking production success to research and resilience.
■ Highlighted new national yield records in multiple categories:
  ■ **Maize:** Six regional maize categories achieved new records, reflecting improved management practices, high-performing hybrids, and favourable late-season rains.
  ■ **Wheat:** Both Northern and Southern Irrigation categories set new record yields due to improved cultivar selection and precision irrigation.
  ■ **Soybeans:** Three new national records were set across irrigation and dryland systems, demonstrating rapid technological adoption.
■ Delivered comprehensive media coverage and digital storytelling to showcase not just yields, but the innovation, science, and stewardship behind success.
■ Positioned Grow for Gold as a key driver of peer learning and knowledge exchange, inspiring producers to pursue sustainable productivity.
	■ New national records achieved across maize, wheat, and soybean categories – a historic year for South African grain production.
	■ Coverage in various media features, with a wide reach amplifying positive sentiment and industry pride.
	■ Reinforced Grain SA's leadership role in supporting innovation, research, and producer development through data-driven recognition.
	■ Enhanced participation from a range of producers reflecting inclusivity and shared success.
	■ Strengthened collaboration across the value chain, from cultivar research to on-farm application, underscoring the collective effort behind agricultural progress.

Grow for Gold 2025 celebrated not only record-breaking yields but also the innovation and determination that define South Africa's grain producers. The awards reaffirmed that the country's farmers are among the most capable and competitive globally, and that Grain SA remains at the heart of recognising and driving agricultural excellence.

Trends, learnings and future outlook

The reporting year demonstrated that clear systems, consistent messaging, and analytical insight can transform communication from a support function into a driver of influence. Grain SA's Communication, PR and Advocacy activities proved that when strategy, data and storytelling align, the organisation can meaningfully shape both public discourse and policy direction.

Several key trends and learnings emerged:

DATA-DRIVEN STORYTELLING

The adoption of monitoring systems and planning platforms enabled the team to make decisions rooted in insight rather than intuition. Measuring reach, sentiment, and content resonance made it possible to identify which messages carried the most weight with members, media, and policymakers.

PROGRAMMATIC DISCIPLINE

The 90-day rhythm created a culture of accountability and agility. Instead of responding to events, the team anticipated them – ensuring alignment between communication activities and advocacy priorities.

EMPATHY AND TRANSPARENCY

Communication that reflects the realities of producers – climate challenges, market volatility, and input cost pressures – resonate more deeply with both members and the public. Credibility and relatability go together in advocacy.

INTEGRATED ADVOCACY

Embedding advocacy within all communication ensured that policy messages were no longer limited to formal submissions. Every event, press release, or interview became an advocacy moment.

CROSS-DEPARTMENT COLLABORATION

Communication became a platform for integration – linking Research, Economics, NAMPO and PGP into one coherent narrative of resilience and innovation.

Across the year, Grain SA's communication evolved from broadcasting information to curating influence. Emerging trends include:

- **Programmatic strategy execution** – short, measurable cycles that drive momentum.
- **Empathy and transparency in messaging**, reflecting producers' realities while advocating for solutions.
- **Platform purposefulness** – using the right channel for the right story.
- **Analytics-led decision-making**, ensuring communication is both art and science.

These shifts position the department not just as a communicator of Grain SA's work, but as a strategic enabler of organisational influence.

The road ahead

The coming year focuses on consolidation, capability and credibility. As we enter 2025/2026, the focus sharpens on:

- **Complete the CCR and analytics integration**
  Establish a unified communication and relationship management platform that centralises contact, engagement, and feedback systems across departments and to personalise member communication.
- **Elevate advocacy storytelling**
  Combine data with human narratives to communicate complex issues in accessible, emotive ways.
- **Expand analytics and reporting**
  Refine monitoring dashboards to provide deeper insight into advocacy impact and audience sentiment, including real-time departmental reports.
- **Enhance digital reach**
  Continue optimising Grain SA's website and social media platforms to deliver timely, visual and shareable content.
- **Upskill internal communicators**
  Provide focused training on visual storytelling, media engagement, and brand representation to ensure every staff member is a confident ambassador.
- **Strengthen internal communication**
  Implement more structured updates between departments to improve message flow and consistency and amplify research, economics and farmer development messages.
- **Foster collaboration with industry partners**
  Build partnerships that extend the reach of Grain SA's advocacy messages across the entire agricultural value chain.

Embedding advocacy within all communication ensured that policy messages were no longer limited to formal submissions.

In essence, Grain SA's communication, PR, and advocacy efforts have moved from information delivery to influence creation – connecting producers, partners, and policymakers through trust, transparency, and shared purpose. These steps will ensure that communication remains a key enabler of organisational success – supporting evidence-based advocacy, stronger stakeholder relationships, and an informed, connected producer base.

Expected outcomes will include a live and operation CCR system by Q2 2026 – an increase in audience reach and engagement, improvement in stakeholder satisfaction with information flow, a growth in positive sentiment across all media platforms and a tangible link between advocacy campaigns and policy engagement outcomes.

Grain SA's communication journey over this reporting year reflects a simple truth: leadership is influence, and influence depends on communication. Through strategic clarity, digital innovation, and consistent advocacy, Grain SA continues to give South Africa's grain producers not only a voice – but a platform powerful enough to shape the future of agriculture.











GROUP ENABLING SERVICES

Finance and IT

SYSTEMS AND PROCESSES OPTIMISED THROUGH DIGITISATION

During the 2025 financial year, the Grain SA Group finalised the remaining administrative processes required to implement the new corporate structure and began operationalising its implications for the finance function.

The finance team made significant progress in optimising systems and processes, with major strides in digitisation. Most finance workflows are now fully paperless, improving turnaround times and enhancing both the accessibility and traceability of information.

Modern tools such as e-signatures and automated approval workflows have further strengthened process efficiency. In addition, the core financial systems were configured to automate tasks previously performed manually, resulting in greater accuracy and operational effectiveness.

Sincere appreciation is extended to the members of the finance team — Boipelo Mosikare, Elda-Beth Keeley, Leticia Reid, Machel Kruger and Madelie Goosen — for their dedication and hard work throughout this year. Thank you also to Stien le Roux and Johan Teesen who assisted with the workflow implementation.

GROUP ENABLING SERVICES

Company Secretary (CoSec)

COSEC A TRUSTED ADVISOR AND STRATEGIC PARTNER

1. Introduction and value proposition

1.1 In terms of Section 76 of the Companies Act of 2008, a director (including Board or committee members) must exercise his powers and perform his duties:

i) In good faith and for a proper purpose;

ii) In the best interest of the company; and

iii) With the degree of care, skill and diligence that may reasonably be expected.

1.2 These fiduciary duties are applicable to the members of the Grain SA Board, trustees or directors who serve on boards within the Grain SA group of entities.

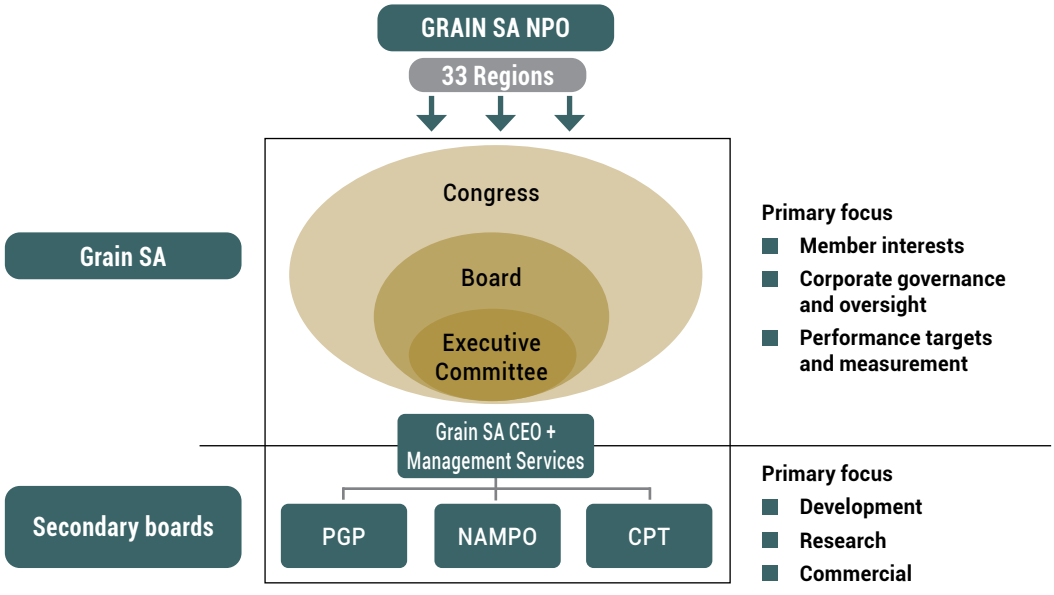
1.3 VALUE PROPOSITION: COSEC

The CoSec Team must continue to be the trusted advisor and strategic partner within the group, ensuring robust governance, regulatory compliance and efficient Board management to support strategy, within the group. Key focus areas had been agreed upon during the annual strategic session relating to governance, risk, compliance and legal requirements. Objectives had been set, and were implemented accordingly, with due quarterly planning. The status of implementation had been reported at ExCo and Board meetings.

2. Grain SA and related entities: Business model

2.1 Congress 2024 resolved to restructure Grain SA into a group of entities, to ensure that Grain SA continues to render member related services, with a secondary board structure to focus on Research, Farmer Development and commercial activities, as follow:

2.2 GRAIN SA NPO AND RELATED ENTITIES



2.3 Whilst the restructuring necessitated the revision of all the founding docs of each entity, the focus during the reporting period (2024 and 2025) was on implementation in accordance with the amended Grain SA Constitution, the amended Memorandum of Incorporation for both Nampo (Pty) Ltd and Phahama Grain Phakama NPC as well as the Deed of Amendment of the Commercial Producers Trust.

2.4 Grain SA NPO is the sole shareholder of Nampo (Pty) Ltd and the incorporator of Phahama Grain Phakama NPC. The trustees for the Commercial Producers Trust are being nominated from Grain SA working groups.

2.5 Enabling services within the group of entities include:

i) Human Resources and Corporate services
ii) Communication, Public Relations and Advocacy
iii) CoSec services
iv) IT and Data development and
v) Financial services.

2.6 These enabling services are being rendered to all the entities in the group and are regulated in terms of service level agreements, between Nampo (Pty) Ltd and the other entities in the group. Services are rendered at agreed to costing determined annually in the budget planning process.

3. Compliance with Section 30B of the Income Tax Act: Sale of Business Agreement

3.1 Section 30B(2)(b)(ix) of the Income Tax Act determines that substantially the whole of Grain SA's income must be derived from its annual or other long-term members. Substantially the whole is considered by SARS to be between 85% and 90% of Grain SA's funding.

3.2 Congress 2024 approved the restructuring of the organisation, to comply with Section 30B of the Income Tax Act, on the condition that no fixed assets would be transferred from Grain SA.

3.3 However, during the process of restructuring, it became evident that total compliance with Section 30B will not be achieved, without the transfer of:

a) Alenti office park block C, and
b) Farm Marthaville with NAMPO Park.

3.4 Should Alenti office park block C and the farm Marthaville remain in the name of Grain SA, the income from the rental of such properties to Grain SA, would be deemed as non-member related.

3.5 The Grain SA Board, after sufficient assurance was received, resolved that the farm Marthaville with NAMPO Park, and Alenti office park block C, should be transferred as part of the Sale of Business Agreement.

3.6 The agreement was structured as a loan and the issuance of a single share to Grain SA, to ensure that Grain SA remains the sole shareholder.

3.7 Article 22.9 of the Constitution of Grain SA determines that Congress must approve the sale of any movable assets of Grain SA, constituting more than half of the value of the total assets of Grain SA. Therefore, the matter had also been referred to Congress 2025, for approval.

3.8 On 12 March 2025, Congress formally approved the transfer of these two assets from Grain SA NPO to Nampo (Pty) Ltd.

3.9 The Sale of Business Agreement was implemented per phase, with the last phase (phase 6) with the transfer of properties by 28 August 2025.

4. Amendments to the founding documents of Grain SA and related entities

4.1 GRAIN SA CONSTITUTION RELATING TO MEMBERSHIP

4.1.1 New category of membership

Allowing for student membership, providing for students who:

- Completed grade 12;
- Do not produce grain;
- Wants to associate with Grain SA, and
- Pay the membership fees as determined from time to time.

Student members are not eligible to vote at Congress, but may attend Congress as observers.

4.1.2 Timelines for membership

- For accounting purposes, to be consolidated in the group financial statements, for the term 1 October to 30 September annually, and
- To qualify for as voting delegates to Congress, membership and levies to be paid up to the end of February preceding Congress.

4.2 THE MEMORANDUM OF INCORPORATION (MOI) OF PHAHAMA GRAIN PHAKAMA NPC

4.2.1 The requirement that the CEO of Grain SA must serve *ex officio* as Chairperson of the Board was amended. The MoI now determines that:

a) The CEO of Grain SA serves *ex officio* as the managing director, and

b) That the Chairperson of the Board be elected from the ranks of directors as nominated by the Grain SA Board, and

c) That the CEO reports directly to the managing director, and not to the Chairperson of the Board.

4.3 The Delegations of Authority (DoA's) from the Grain SA Board to the boards of directors of Nampo (Pty) Ltd and Phahama Grain Phakama NPC.

4.3.1 Delegation of Authority (DoA) from Grain SA Board

4.3.1.1 The Grain SA Board owns all Delegation of Authority in Grain SA and underlying structures and entities.

4.3.1.2 Changes to the Delegation of Authority may be proposed from time to time, but must be approved by the Grain SA Board.

4.3.1.3 The Delegation of Authority sets roles and responsibilities and levels of authority as delegated from Grain SA Board to subordinate structures and entities in the group.

4.3.2 Nampo (Pty) Ltd

4.3.2.1 Delegation of Authority had been approved for:

a) Operations during the annual NAMPO event at NAMPO Park, clearly defining the role of the Harvest Day Committee and when actions must be escalated for final approval to the CEO and Grain SA Chairperson.

b) The appointment of auditors, to align with the requirements of the Grain SA Constitution, with Grain SA as the sole shareholder.

4.3.3 Phahama Grain Phakama NPC

4.3.3.1 Delegation of Authority had been added relating to the appointment of an auditor, with final approval by the Grain SA Board, to ensure consolidated statements within the group.

5. Strategy planning session

5.1 A two-day strategy session had been concluded on 14 and 15 April 2025, at NAMPO Park.

5.2 The outcome of this strategy session, was presented to the Grain SA Board on 25 June 2025. The pillars for the Value Proposition of Grain SA to its members and other stakeholders, was unanimously approved by the Board, as follows:



5.3 Strategy and the value proposition for the related entities were referred to the relevant boards of Nampo (Pty) Ltd, Phahama Grain Phakama NPC and the Commercial Producers Trust for approval.

6. Governance and policy

6.1 During the reporting period, the following policies were approved by the Grain SA Board:

No.	Policy	Approval
6.1.1	Charter and terms of reference to the Audit and Risk Committee.	Approved by the Grain SA Board on 5 February 2025.
6.1.2	Code of conduct: Applicable to elected individuals and staff members serving within the Grain SA group of entities. Note: ■ Within the Code of Conduct, references to policy and procedure are accessible via links from the code to the applicable policy. This includes references to the Protection of Personal Information Policy. (Approved by the Grain SA Board on 20 June 2023), and ■ The PAIA Manual: Approved by the Grain SA Board on 20 June 2023.	Approved by the Grain SA Board on 17 September 2025.
6.1.3	Conflict of interest policy: Applicable to elected individuals and office bearers, as well as to staff members serving as employees within the Grain SA group.	Approved by the Grain SA Board on 17 September 2025.
6.1.4	Legal aid policy reviewed and updated.	Approved by the Grain SA Board on 17 September 2025.
6.1.5	Whistleblowing policy and procedure for the Grain SA group of entities.	Approved by the Grain SA Board on 17 September 2025.

No.	Policy	Approval
6.1.6	The approval hierarchy in terms of the Finance and Corporate Policy and procedure for the Grain SA group.	Approved by the Grain SA Board on 20 June 2023 and amended by the Grain SA Board on 5 February 2025.
6.1.7	Human Resources policy and procedures for the Grain SA group of entities, inclusive of the update of disciplinary processes to comply with labour legislation.	Approved by the Grain SA Board on 20 June 2023, and currently under revision for consideration by the RemCom, and employees.

6.2 GOVERNANCE AND COMPLIANCE

6.2.1 CIPC submittals

6.2.1.1 Beneficial ownership, annual returns and updates of directors had been submitted to the CIPC for both Nampo (Pty) Ltd as well as Phahama Grain Phakama NPC.

6.2.2 Risk register

6.2.2.1 The register for risk mitigation had been reviewed by the Audit and Risk Committee during June 2025. All departments and entities in the group had to submit material risks to be noted, with actions needed to mitigate such risk.

6.2.2.2 In terms of the Grain SA Constitution (Article 14.14), the Grain SA Board has the duty to annually review the top 10 risks applicable to all entities within the group. The risk register will be updated from time to time, for revision by the Audit and Risk Committee, as well as the Grain SA Board.

6.2.3 Compliance to the Memorandum of Incorporation (MoI): Nampo (Pty) Ltd, relating to NAMPO Tech

6.2.3.1 Congress 2025 approved a mandate to the Grain SA Board to consider a business plan for NAMPO Tech, should it be established at NAMPO Park. Should such a business plan be approved by the Grain SA Board, to be implemented by Nampo (Pty) Ltd, a mandate was also given to the Nampo (Pty) Ltd board of directors to embark on such a new business venture (Art. 1.2 of MoI of Nampo (Pty) Ltd).

6.2.3.2 This process and procedure was needed to comply with the provision in the MoI of Nampo (Pty) Ltd, that any new business venture must serve at Congress for final approval.

6.2.4 Distress fund

6.2.4.1 The MoI of Phahama Grain Phakama determines that any loan or grant to a director of Phahama Grain Phakama NPC, must serve for prior approval at the board of directors of PGP, and for final approval at the Grain SA Board.

6.2.4.2 A loan application had been submitted by a director of the board of Phahama Grain Phakama, for a loan from the distress fund.

6.2.4.3 The application served at the board of directors of Phahama Grain Phakama for prior approval, whereafter it was referred to the Grain SA Board for final approval.

6.2.4.4 A zero rated loan was approved to the director, with an agreement determining terms and conditions for refunding of the loan.

6.2.5 NAMPO Tech business plan

6.2.5.1 A NAMPO Tech Working Committee had been activated.

6.2.5.2 Various work sessions were completed, inclusive of negotiations with stakeholders in the agricultural and training industry, to prepare a business plan.

6.2.5.3 A clear condition by Congress was that a business plan for NAMPO Tech must firstly serve at the Grain SA Board for consideration and approval, prior to implementing.

6.2.5.4 Although various recommendations served at ExCo (Executive Committee of the Grain SA Board), the final business plan was not yet finalised to serve at the Grain SA Board during the reporting period.

6.2.6 Member benefit: Corporate Guarantee relating to a contingency policy

6.2.6.1 Grain SA actively endorsed and promoted a contingency policy as a member benefit, as per Congress resolutions, with the support of Corporate Guarantee.

6.2.6.2 However, the role of Grain SA is limited to that of a referrer, and not as a representative or as an intermediary. Following negotiations, Grain SA and Corporate Guarantee is in the process to finalise a new agreement, to ensure that Grain SA is being appointed as a referrer.

6.2.7 Due diligence

6.2.7.1 Due diligence processes had been completed for ATI, as potential training partner for NAMPO Tech and for Whanau (Pty) Ltd as potential fund negotiators, locally and internationally.

6.2.7.2 The due diligence process had been completed successfully with the support of ATI, supplying relating documentation and financial statements required.

7. Effective structure

7.1 During the reporting period, the following meetings had been presented, with in time board packs, to ensure alignment of agreed upon strategy within the group.

7.1.1 Executive Committee of the Board (ExCo) meetings

- 22 January 2025
- 26 March 2025
- 13 to 15 April 2025
- 12 and 13 June 2025
- 2 September 2025
- 30 and 31 October 2025

7.1.2 Grain SA Board meetings

- 5 and 6 February 2025
- 13 March 2025
- 25 and 26 June 2025
- 22 July 2025
- 17 and 18 September 2025

7.1.3 Audit and Risk Committee meetings

- 17 January 2025 (review of annual and financial statements)
- 30 January 2025 (consolidation of financial statements)
- 31 January 2025 (consolidation of financial statements)
- 12 June 2025 (risk analysis)
- 26 August 2025 (audit planning)

7.1.4 Nampo (Pty) Ltd meetings

- 15 January 2025
- 23 July 2025
- 28 August 2025

7.1.5 Phahama Grain Phakama NPC (PGP) meetings

- 16 January 2025
- 4 July 2025
- 30 July 2025
- 19 August 2025

7.1.6 Commercial Producers Trust meetings

- 14 January 2025
- 24 July 2025
- 27 August 2025

8. Additional projects implemented

8.1 FOOT AND MOUTH DISEASE PROTOCOL GUIDELINES

8.1.1 Prior and during NAMPO 2025, the protocol for the management of foot and mouth disease (as developed within the industry), had been availed to all livestock exhibitors and were closely monitored during the NAMPO 2025 event.

8.1.2 Coordination and support with exhibitions, the state veterinary services, as well as a private veterinary service, ensured safety for exhibitors, valuable livestock and visitors during the NAMPO event.

8.2 MUSEUM AT NAMPO PARK

8.2.1 Santam sponsored a new museum venue at NAMPO Park.

8.2.2 Contents for the museum were prepared by the Museum Committee with the inauguration, during NAMPO 2025.

8.3 OLD BOYS CLUB

8.3.1 Retired Leadership from Grain SA since 1999, had been invited for a strategic work session at NAMPO Park in April 2025. This work session was utilised to ensure that their viewpoints and opinions were taken into consideration, going forward.

8.3.2 This was included during the strategic planning session for Grain SA and the related entities, on 14 and 15 April 2025.

8.4 WORKFLOW FOR COSEC VIA TEAMS AND SHAREPOINT

8.4.1 The ExCo database had been moved to Teams and SharePoint, to ensure a central access point for ExCo and ManCo members to board packs and relevant documents.

8.4.2 This system will be rolled out to the various boards and working groups of the boards.

9. Legal matters

9.1 The following legal processes were managed during the period of reporting, i.e.:

No.	Matter	Status
1	Transfer of Alenti office park and the farm Marthaville.	Completed
2	Transfer of parking bays at Alenti office park.	In process
3	CIPC Tribunal: Unlawful use of Nampo tradename.	Done
4	Defensive name registration for Nampo.	In process
5	Debtors	In process
6	Compilation and the review of various agreements on behalf of all the entities in the group. In the period of reporting, a total of 107 agreements had been compiled or reviewed.	Continuous
7	Opposing the motion by the National Chamber of Milling in the high court of Gauteng (Pretoria).	In process
8	Appointment of trustees for the Commercial Producers Trust at the master's office, Pretoria.	In process
9	Deregistration: Winter Cereals Trust, submittal of claims against the WCT for outstanding payments.	In process
10	Renewal of NAMPO Cape Agreement.	In process

9.2 TRADEMARKS AND DEVICES

9.2.1 The Grain SA, Nampo and PGP trademarks and devices are continuously being updated at the trademarks registry within the applicable classes.

9.2.2 Action was taken via the CIPC tribunal to prevent the unlawful use of the name Nampo, by a third party.

9.2.3 All trademarks and devices are being updated from time to time, within the trademarks registry, on a continuous basis.

10. Other activities

10.1 INDUCTION SESSION

10.1.1 The induction work session for newly elected members of the Grain SA Board was completed on 18 March 2025. The programme included overviews of strategic focus areas for the various departments, as well as the related entities.

10.1.2 The induction session was attended by the Chairperson, Vice-chairpersons, CEO and ManCo.

10.2 NOMINATIONS TO SERVE IN INTERNAL AND EXTERNAL WORKING GROUPS OF GRAIN SA

10.2.1 The Nomination Committee is composed of the Chairperson, the two Vice-chairpersons, the CEO and the CoSec. The Nomination Committee annually meets in February, whereafter proposals are being prepared. Immediately after Congress adjourned, the Grain SA Board convene for a constituting meeting of the Board. At this meeting, the recommendations from the Nomination Committee serve for consideration and approval.

10.2.2 The CoSec team thereafter compile registers for internal working groups and inform external entities of Grain SA Board representation.

10.3 CALENDAR PLANNING

10.3.1 Calendar planning for the various boards, working groups and committees within the group, is annually prepared and availed internally as well as externally to stakeholders.

10.4 FUNDERS OF GRAIN SA PROJECTS

10.4.1 Grain SA annually submits projects to the Maize Trust, the Sorghum Trust, the Oil and Protein Seeds Development Trust, SACTA, the Sasol Trust and other funders.

10.4.2 Interim reports as well as annual reports are submitted to the respective administrators in terms of their policies and procedures.

10.4.3 Factual findings by the Ashton Group of auditors, support reporting to these funders.

11. Grain SA Congress

11.1 Congress 2025 was presented on 12 and 13 March 2025. A record number of 249 paid up delegates attended.

11.2 The Congress theme was 'A producer's journey from surviving to thriving'.

11.3 The keynote speaker was Paul Temple, vice-chairperson of the Global Farmer Network. Mr Temple guided Congress on change management, with lessons learned by farmers in the United Kingdom, following Brexit.

11.4 Panel discussions were presented with Prof Johan Willemse, independent agri economist, Dr Ferdi Meyer from BFAP, Paul Temple and Pieter de Jager (2023 Grain Producer of the Year).

11.5 The focus of the panel discussion was practical advice on adaption to new circumstances to optimise opportunities when markets turn positive again.

11.6 Various interactive question sessions were concluded, to gain valuable insights from delegates.

11.7 A highlight was the online participation of Minister of Agriculture, Mr John Steenhuisen, who also allowed questions from delegates.

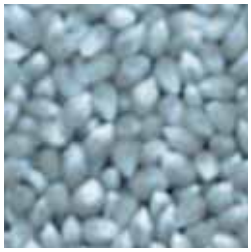
11.8 Elections were completed, with the newly elected Chairperson, Richard Krige (after the retirement of Derek Mathews), with the Vice-chairpersons elected, Jeremia Mathebula and Danie Minnaar.

11.9 On the second day of Congress, in-house matters were dealt with, inclusive of the acceptance of the annual financial and consolidated statements, membership fees and levies and the appointment of auditors.

11.10 Breakaway sessions were also presented to delegates to join work sessions for maize, winter cereals, sorghum, soybeans, sunflowers and groundnuts.

12. Conclusion

12.1 Grain SA as a non-profit organisation will continue to serve grain and oilseeds producers as a mouthpiece for both developing and commercial producers, advocating matters in the interest of producers. Effective governance, risk and compliance management remains essential to ensure continued trust from both members and external stakeholders.





GROUP ENABLING SERVICES

Human Resources and Corporate Services

OUR FOCUS SPANS THE ENTIRE EMPLOYEE JOURNEY

Value proposition

The Human Resources and Corporate Services Department is committed to fostering a high-performance, inclusive, and innovative workforce that positions the organisation as an employer of choice. We create an enabling and caring environment where employees feel valued, supported, and equipped to thrive, while ensuring that visitors and staff experience a welcoming, safe, and fully functional workplace.

Through strategic talent management and a culture of continuous growth and engagement, we drive business success and strengthen organisational capability. Our focus spans the entire employee journey – including talent acquisition, onboarding, engagement, training and development, performance management, and diversity, equity and inclusion – ensuring a seamless, supportive, and empowering experience.

Our influence extends across all departments, from executive leadership to frontline teams, ensuring alignment with the corporate strategy and the evolving needs of our workforce. By partnering with the business, we enable people to perform at their best and contribute meaningfully to the Organisation's long-term sustainability and success.

Strategic focus areas

- **TRAINING AND DEVELOPMENT**

  Strengthening organisational capability by investing in targeted training programmes and development initiatives to support employee growth and performance.

- **STATUTORY AND REGULATORY COMPLIANCE**

  Ensuring full compliance with statutory requirements, including Employment Equity (EE) reporting, AgriSETA Workplace Skills Plans and Annual Training Reports, as well as annual and mid-year SARS tax submissions.

- **EMPLOYEE WELLNESS**

  Prioritising the holistic wellbeing of employees through wellness initiatives, support programmes and activities that promote a healthy and resilient workforce.

- **TALENT ACQUISITION AND RETENTION**

  Driving effective recruitment strategies to attract high-quality talent while implementing retention practices that support long-term organisational sustainability.

- **EMPLOYEE BENEFITS AND REMUNERATION**

  Managing competitive and equitable employee benefits and remuneration structures that align with organisational objectives and market standards.

- **PERFORMANCE MANAGEMENT**

  Supporting a culture of accountability and excellence by implementing structured performance management processes and tools across all departments.

- **WORKPLACE AND FACILITIES MANAGEMENT**

  Maintaining a clean, organised, and welcoming work and meeting environment – including efficient switchboard operations – to ensure a professional and productive workplace experience.

- **ORGANISATIONAL DEVELOPMENT**

Organisational development

'If you want to go fast, go alone. If you want to go far, go together'. This African proverb captures the balance between speed and sustainability in achieving goals. Going fast and going alone reflects the ability to act decisively, innovate quickly, and take bold steps when needed. In a competitive and developmentally-orientated environment, this agility enables organisations to seize opportunities, adapt to change, and respond to challenges with confidence. Going far and going together, on the other hand, speaks to the importance of collaboration, inclusivity, and shared purpose.

Sustainable success requires the strength of many – diverse perspectives, complementary skills, and mutual support. When teams and other stakeholders are aligned, the organisation builds resilience, deepens commitment, and ensures that progress becomes not only faster, but also lasting.

At Grain SA, we recognise the value of being able to do both. In this financial year, CEO Dr Tobias Doyer launched the first Strategic Implementation Support (SIS) project as part of our ongoing organisational development journey. The initiative was designed to build on the value propositions created the year before and to support all teams set both one- and five-year target conditions, starting the process of creating clarity of direction and a structured process for tracking progress.

> Going far and going together, on the other hand, speaks to the importance of collaboration, inclusivity, and shared purpose.

Each team engaged in quarterly sessions with facilitator Cheryl Muller from Lucca Consulting, under the project oversight of Tessa De Wet from Integrated Development & Employment Alliances (IDEA). These sessions provided space and opportunity to review progress and plan the next quarter.

Importantly, the process went beyond individual teams and created opportunities for inter-team learning, strengthening collaboration across the organisation. Each quarter also concluded with a joint review session between Grain SA, Lucca and IDEA, ensuring leadership had visibility of progress and could reinforce strategic alignment.

Evaluation feedback from the first year of SIS underscored the strong value of the project's co-creative and inclusive design. The sacrifice of time away from tactical day-to-day work tasks was offset by the value gained from reflecting, setting collective goals, and engaging in meaningful discussion. The chance to learn directly from other teams was highlighted as particularly beneficial, sparking cross-entity awareness, creating informal learning opportunities, and broadening perspectives on how each unit contributes to Grain SA's larger mission.

The true value of the SIS project lies in its ability to build alignment, collaboration, and disciplined resource stewardship across the organisation. By engaging in structured planning and shared reflection, teams have the potential to be more coordinated, more resilient, and more capable of pursuing collective goals.

Looking ahead, further sharpening of the proverbial axe will be to include continuous improvement and systematisation processes as part of the Grain SA organisation development journey, embedding these practices deeper into the organisation's culture.

In this way, Grain SA is positioning itself not only to go far together but also to move swiftly when opportunities arise – combining the energy of improvement and innovation with the endurance of co-creative and inclusive collaboration. This dual capacity ensures that Grain SA does not simply get ahead but continues to stay ahead in serving and supporting South Africa's grain producers.

Regional meetings 2024/2025

GRAIN SA: THE EAR THAT HEARS

In a world full of turmoil, uncertainty and challenges, grain and oilseed producers can be assured that they have a voice in the grain industry: a voice that cannot be ignored or silenced, a voice that lives the passion for grain farming from the heart of the Jacaranda City across the country.

At its annual Congress in 2025, Grain SA reaffirmed and emphasized the organisation's raison d'être: To ensure that every grain producer can farm sustainably and profitably in South Africa. To achieve this goal, however, it is necessary to understand at the grassroots level – or rather farm level – what the stone in the producer's shoe is. Grain SA's leadership and personnel team undertake an annual visit to all the grain-producing regions of the country. During the year's 44 regional meetings, 1 253 producers were 'visited' in person.

The regional meetings are not only held to shake hands and to show their faces but are also an opportunity for each producer to present their unique situation to the leaders, economists, researchers, marketers and experts at Grain SA and to convey their concerns about the challenges in the industry. This gives producers the opportunity to ask questions about what is going on behind the scenes, and to voice their opinions on the state of affairs in the industry.

Issues raised

Extremely important and challenging issues such as land expropriation and reform, pest control operator (PCO)-certification, banned agrochemicals, and challenges with wheat import tariffs were raised during the meetings.

Many producers find it challenging to stay afloat in the volatile markets and stay informed of what is happening. Grain SA was able to provide feedback here on how the alternative differential that is currently being tested on soybean contracts, are applied. Regarding soybeans, the question was also asked whether the new 100-ton contract was really necessary and what growing pains can be expected in the market.

The visits to producers highlighted the importance of relationships with government, industry associates, agents and role players. These relationships enable Grain SA to speak on behalf of the producer at industry forums including; the national crop estimates liaison committee, the JSE, government departments, input suppliers, milling operations and presses as well as various other role players whose decisions have an impact on the producer's operations. Through Grain SA's close ties with other agricultural organisations and government, important matters can be conveyed easily and quickly to the relevant parties.

> The annual regional meetings not only provide an opportunity for producers to highlight problems and challenges, but also for Grain SA to provide feedback on various developments in the industry.





The annual regional meetings not only provide an opportunity for producers to highlight problems and challenges, but also for Grain SA to provide feedback on various developments in the industry over the past year such as the spread of grain diseases, drone irrigation regulations, the positive effects of the SACTA levies as well as the latest efforts to renovate railways and ports. In addition, good news could be shared regarding Nexus Components and Corporate Guarantee's member benefits to Grain SA members which are aimed at easing the pressure on the producer's pocket.

During the countrywide visits, Grain SA also visited the developing producers of the Phahama Grain Phakama Programme (PGP). They have their own unique set of challenges. Questions from the regions regarding short-term and crop insurance as well as the role of government in PGP were answered. The need to look at second-hand equipment that is more affordable emerged from the PGP visits. It was also asked how the information conveyed by economists could be utilised at farm level.

After the regional meetings, Grain SA held a successful Congress where further questions could be answered and mandates were given to the leadership and staff of the organisation. Here, producers also had the opportunity to speak directly to the Minister of Agriculture and to present their respective challenges to him.

With producers' love for farming and a passion for agriculture, Grain SA continues to promote and fight for its members' cause, both behind the scenes and at farm level, so that grain producers can have a bright and prosperous future in South Africa.

Regional meetings create the opportunity for both Grain SA and producers who are members of the organisation to be informed about the most important and urgent bottlenecks in the industry. In this way, Grain SA ensures that effective action can be taken on behalf of members.





Board member fees

Region number/ Position		Grain SA Board	Grain SA Executive Committee	Audit and Risk Committee	Nampo (Pty) Ltd Board	Phahama Grain Phakama Board	Commercial Producers Trust Board	Working groups	Emoluments (R)	Re-imbursive claims (R)	Total (R)
		Number of meetings held and/or attended						Depending on number of Working groups			
		4	5	3	3	4	3				
Grain SA Board members											
Chairperson	Richard Krige	4	5	3	3	4	3	6	471 747	71 539	543 286
Vice-chairperson	Jeremia Mathebula	4	5	3		4		-	421 656	78 893	500 549
Vice-chairperson	Danie Minnaar	4	5	3	3			3	254 223	42 176	296 399
1	Gert Pretorius	4					3	3	1 462	3 294	4 756
2	Koos Bezuidenhout	3						2	-	-	-
3	Cobus van Zyl	4	3		2			6	16 380	4 842	21 222
4	Francois Geldenhuys	4						5	1 462	915	2 377
5	Will Grobler	3						2	1 462	4 018	5 480
6	Dirk Laas	4						2	1 462	2 783	4 245
7	Pietman Botha	4						10	4 518	4 465	8 983
8	Joseph Swanepoel	4						-	3 743	7 924	11 667
9	Andries Groesbeek	4						3	6 068	11 034	17 102
10	Ryk Pretorius	4					2	5	7 618	26 786	34 404
11	Gerrit Roos	4						2	5 205	12 604	17 809
12	Ebert du Plessis	4					3	4	1 462	11 533	12 995
13	Willem Groothof	4	4					5	19 800	13 092	32 892
14	Ewald Klingenberg	3						1	-	6 144	6 144
15	Paul Zietsman	3						7	4 518	14 186	18 704
16	Wessel Hattingh	3						3	3 012	5 568	8 580
17	Hendri Jansen van Rensburg	4						4	-	1 830	1 830
18	Neil Claassen	4					2	4	4 562	12 446	17 008
19	Jaco Breytenbach	4						5	13 046	22 069	35 115
20	Pieter-Albert Botha	3		2				1	5 425	8 024	13 449
21	Gerdus Bester	3						1	-	-	-
22	Willie Marais	3						5	2 237	6 986	9 223
23	Tom van Rooyen	3	3	3	3			2	8 260	3 436	11 696
24	Jacques van der Merwe	3						3	3 875	-	3 875
25	Dissie Kruger	4						1	2 193	12 392	14 585
26	Koos Blanckenberg	3						2	1 550	1 538	3 088
27	Jose de Kock	4		3	3		3	3	22 854	20 391	43 245

Region number/ Position		Grain SA Board	Grain SA Executive Committee	Audit and Risk Committee	Nampo (Pty) Ltd Board	Phahama Grain Phakama Board	Commercial Producers Trust Board	Working groups	Emoluments (R)	Re-imbursive claims (R)	Total (R)
		Number of meetings held and/or attended						Depending on number of Working groups			
		4	5	3	3	4	3				
Grain SA Board members											
28	William Raphoto	3						-	775	4 800	5 575
29	Mussa Thomas Sibiya	4				3		-	2 193	5 130	7 323
31	Shadrack Mbele	4						2	1 550	5 646	7 196
32	Richard Swart	4						-	8 393	19 713	28 106
33	Thobani Ntonga	4				2		3	21 903	37 782	59 685
Additional member: Representative of Farmer Development	Ramoso Pholo	4	4			4		2	38 737	41 192	79 929
14 (Co-opted member)	Tommie Scholtz	1						2	-	5 796	5 796
25 (Co-opted member)	Fanie Bekker	3						2	1 550	2 880	4 430
Payments to Board members that concluded their term and other Working groups											
	Wimpie Rossouw							1	1 550	3 600	5 150
Board member term completed	Derek Mathews	1	2	1	1	1	3	1	266 754	38 777	305 531
	Andries Theron							2	1 462	4 597	6 059
	Jacobus van Coller							1	775	2 880	3 655
Board member term completed	Jozeph du Plessis	1		1				2	-	-	-
	Willie Oosthuizen							2	-	1 135	1 135
Board member term completed	Ralf Küsel	1						3	-	7 222	7 222
Board member term completed	Marius Groenewald	1					3	1	2 193	2 440	4 633
Additional member: Representative of Farmer Development	Patrick Stuurman	1				1		1	11 828	19 873	31 701
	Johannes Swart							1	750	2 880	3 630
	George van der Merwe							1	775	-	775
Board member term completed	Andries Kirsten	1						-	2 924	2 661	5 585
								Total	**1 653 912**	**619 910**	**2 273 822**

General information

COUNTRY OF INCORPORATION AND DOMICILE	South Africa
REGISTRATION NUMBER	045-605-NPO
NATURE OF BUSINESS AND PRINCIPAL ACTIVITIES	The group of entities incorporated in South Africa functions to promote the interests of grain producers within South Africa.
GRAIN SOUTH AFRICA BOARD	RP Krige (Chairperson) JDM Minnaar (Vice-chairperson) JM Mathebula (Vice-chairperson) Assisted and on behalf of the Grain South Africa Board members as listed on page 129
AUDIT AND RISK COMMITTEE	S Barac (Chairperson – Independent) PA Botha JDM Minnaar J M Mathebula J de Kock RP Krige TF van Rooyen
BUSINESS ADDRESS	Alenti Office Park – Block C 457 Witherite Road The Willows Pretoria 0041
POSTAL ADDRESS	PO Box 74087 Lynnwood Ridge 0040
BANKERS	First National Bank Limited Standard Bank Limited
LEVEL OF ASSURANCE	These financial statements have been audited in compliance with the applicable requirements of Grain South Africa Constitution.
AUDITOR	PricewaterhouseCoopers Inc. Registered Auditors
GROUP SECRETARY	NJ Vermaak
COMPILER	Lloyd Viljoen Chartered Accountants (SA)
ISSUED	6 February 2026

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Grain South Africa Board responsibilities and approval

The Grain South Africa Board is required to maintain adequate accounting records and are responsible for the content and integrity of the annual financial statements and related financial information included in this report. It is their responsibility to ensure that the annual financial statements fairly present the state of affairs of the group of entities and the organisation as at the end of the financial year and the results of its operations and cash flow for the period then ended, in conformity with the IFRS for SME® Accounting Standard. The external auditor is engaged to express an independent opinion on the annual financial statements.

The annual financial statements are prepared in accordance with the IFRS for SME® Accounting Standard and are based upon appropriate policies consistently applied and supported by reasonable and prudent judgements and estimates.

The Grain South Africa Board acknowledge that they are ultimately responsible for the system of internal control established by the group of entities and the organisation and place considerable importance on maintaining a strong control environment. To enable the Grain South Africa Board to meet these responsibilities, they set 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 group of entities and separate organisation and all employees are required to maintain the highest ethical standards in ensuring the group of entities and separate organisation business is conducted in a manner that in all reasonable circumstances is above reproach.

The focus of risk management in the group of entities and the organisation is on identifying, assessing, managing and monitoring all known forms of risk across the group of entities and the organisation. While operating risk cannot be fully eliminated, the group of entities and the organisation endeavours to minimise it by ensuring that appropriate infrastructure, controls, systems, and ethical behaviour are applied and managed within predetermined procedures and constraints.

The Grain South Africa Board is also responsible for the control over, and the security of the group of entities and separate organisation's website and where applicable, for establishing and controlling the process for electronically distributing Annual Reports and other financial information of the group of entities and separate organisation.

The Grain South Africa Board 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 annual financial statements. However, any system of internal control can provide only reasonable, and not absolute assurance against material misstatement or loss.

The Grain South Africa Board has reviewed the group of entities and separate organisation's cash flow forecast for the year to 30 September 2026 and, in the light of this review and the current financial position, they are satisfied that the group of entities and separate organisation have access to adequate resources to continue in operational existence for the foreseeable future.

”

The Grain South Africa Board acknowledge that they are ultimately responsible for the system of internal control established by the group of entities and the organisation and place considerable importance on maintaining a strong control environment.

The external auditor is responsible for independently auditing and reporting on the group of entities and the organisation's annual financial statements. The consolidated and separate financial statements have been examined by the group of entities and the organisation's external auditor and their audit report is presented on pages 131 to 133.

The external auditor was given unrestricted access to all financial records and related data, including minutes of all meetings of the Grain South Africa Board. The Grain South Africa Board believes that all representations made to the external auditor during their audit are valid and appropriate.

The consolidated and separate annual financial statements as set out on pages 134 to 164, including the directors report set out on pages 128 to 130 which have been prepared on the going concern basis, were approved and authorised by the Grain South Africa Board on 6 February 2026 were signed on its behalf by:

RICHARD KRIGE
Chairperson

DANIE MINNAAR
Vice-chairperson











Grain South Africa Board report

The Grain South Africa Board has the pleasure in submitting their report on the financial statements of Grain South Africa Group ('the group') and Grain South Africa ('Grain SA' or 'the organisation') for the year ended 30 September 2025.

1. Nature of business

MAIN BUSINESS AND OPERATIONS

Grain South Africa group of entities and the organisation is incorporated in South Africa and is a group of entities that functions to promote the interests of grain producers within South Africa. The group of entities and the organisation operates in South Africa.

There have been no material changes to the nature of the group of entities or the organisation's business from the prior year.

REVIEW OF ACTIVITIES

The consolidated and separate annual financial statements have been prepared in accordance with the IFRS for SME® Accounting Standard. The accounting policies have been applied consistently compared to the prior year.

The operating results and state of affairs of the group of entities and the organisation are fully set out in the financial statements and do not in our opinion require any further comment.

2. Going concern

The group of entities and the organisation's annual financial statements have been prepared on the basis of accounting policies applicable to a going concern. This basis presumes that funds will be available to finance future operations and that the realisation of assets and settlement of liabilities, contingent obligations and commitments will occur in the ordinary course of business.

Cash flow forecasts are prepared and monitored on a continuous basis. The Grain South Africa Board is satisfied that the group of entities and the organisation have a sound financial position and that it has access to sufficient resources to continue trading in the foreseeable future and accordingly the financial statements have been prepared on a going concern basis.

> The Grain South Africa Board is satisfied that the group of entities and the organisation have a sound financial position and that it has access to sufficient resources to continue trading in the foreseeable future.

The Grain South Africa Board is not aware of any new material changes that may adversely affect the group of entities and the organisation. The Grain South Africa Board is also not aware of any material non-compliance with statutory or regulatory requirements or any pending changes to legislation that may affect the group of entities and the organisation.

3. Events during and after reporting date

The Grain South Africa Board not aware of any matter or circumstance arising since the end of the financial year to the date of this report that could have a material effect on the financial position of the group of entities and the organisation.

4. Grain South Africa Board

The Grain South Africa Board of the organisation during the year and up to the date of this report are as follows:

COMPOSITION OF THE GRAIN SOUTH AFRICA BOARD

RP Krige (Chairperson)
JM Mathebula (Vice-chairperson)
JDM Minnaar (Vice-chairperson)
F Bekker
G Bester
K Bezuidenhout
K Blanckenberg
P Botha
PA Botha
J Breytenbach
N Claassen
J de Kock
E du Plessis
J du Plessis (term completed 13 March 2025)
F Geldenhuys
W Grobler
M Groenewald (term completed 13 March 2025)
A Groesbeek
W Groothof
W Hattingh
H Jansen van Rensburg
A Kirsten (term completed 13 March 2025)
E Klingenberg
R Küssel (term completed 13 March 2025)
D Kruger
D Laas
W Marais
DJM Mathews (term completed 13 March 2025)
S Mbele
T Ntonga
R Pholo
G Pretorius
R Pretorius
W Raphoto
G Roos
T Scholtz
MT Sibiya
J Swanepoel
R Swart
J van der Merwe
T van Rooyen
C van Zyl
P van Zyl (term completed 13 March 2025)
P Zietsman

5. Secretary

NJ Vermaak is the secretary appointed.

6. Independent auditor

PricewaterhouseCoopers Inc. was the independent auditors for the year under review.

7. Interest in subsidiaries

Details of material interests in subsidiaries are presented in the consolidated and separate annual financial statements in Note 5.

The interest of the group in the profit/(loss) of its subsidiaries for the year ended 30 September 2025 and 30 September 2024 are as follows:

Subsidiary	% Holding 2025	% Holding 2024	Profit/(loss) 2025	Profit/(loss) 2024
	R	R	**R**	R
Nampo (Pty) Ltd	**100%**	100%	**4 169 392**	(276 954)
Special purpose entity				
Phahama Grain Phakama NPC	*	*	**5 935 581**	5 947 568
Commercial Producers Trust	*	*	**6 064 722**	5 041 747

** Special purpose entity over which the organisation has control.*

Independent auditor's report

To the Grain South Africa Board of Grain South Africa group.

Our opinion

In our opinion, the consolidated and separate financial statements present fairly, in all material respects, the consolidated and separate financial position of Grain South Africa (the organisation) and its subsidiaries (together the group) as at 30 September 2025, and its consolidated and separate financial performance and consolidated and separate cash flows for the year then ended in accordance with the IFRS for SMEs® Accounting Standard.

WHAT WE HAVE AUDITED

Grain South Africa's consolidated and separate financial statements set out on pages 134 to 164 comprise:

- the consolidated and separate statements of financial position as at 30 September 2025;
- the consolidated and separate statements of comprehensive income for the year then ended;
- the consolidated and separate statements of changes in equity for the year then ended;
- the consolidated and separate statements of cash flows for the year then ended; and
- 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 consolidated and separate 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 group 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 corresponding sections of the International Ethics Standards Board for Accountants' *International Code of Ethics for Professional Accountants (including International Independence Standards).*

Other information

The Grain South Africa Board are responsible for the other information. The other information comprises the information included in the document titled 'GSA Annual Report 2025'. The other information does not include the consolidated or the separate financial statements and our auditor's report thereon.

Our opinion on the consolidated and separate 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 consolidated and separate 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 consolidated and separate 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 Grain South Africa Board for the consolidated and separate financial statements

The Grain South Africa Board are responsible for the preparation and fair presentation of the consolidated and separate financial statements in accordance with the IFRS for SMEs® Accounting Standard and for such internal control as the Grain South Africa Board determine is necessary to enable the preparation of consolidated and separate financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the consolidated and separate financial statements, the Grain South Africa Board are responsible for assessing the group's and the organisation's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Grain South Africa Board either intend to liquidate the group and/or the organisation or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the consolidated and separate financial statements

Our objectives are to obtain reasonable assurance about whether the consolidated and separate 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 consolidated and separate 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 consolidated and separate financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the group's and the organisation's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Grain South Africa Board.
- Conclude on the appropriateness of the Grain South Africa Board'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 group's and the organisation's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the consolidated and separate 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 group and/or organisation to cease to continue as a going concern.

- Evaluate the overall presentation, structure and content of the consolidated and separate financial statements, including the disclosures, and whether the consolidated and separate financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- Plan and perform the group audit to obtain sufficient appropriate audit evidence, regarding the financial information of the entities or business units within the group, as a basis for forming an opinion on the consolidated financial statements. We are responsible for the direction, supervision and review of the audit work performed for purposes of the group audit. We remain solely responsible for our audit opinion.

We communicate with the Grain South Africa Board 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.
Director: HB Eksteen
Registered Auditor
Johannesburg, South Africa
6 February 2026







Statement of financial position

AT 30 SEPTEMBER 2025

	NOTES	GROUP 2025 R	GROUP 2024 R	ORGANISATION 2025 R	ORGANISATION 2024 R
ASSETS					
Non-current assets					
Property, plant and equipment	3	**46 941 339**	44 775 111	**2 003 851**	24 823 818
Intangible assets	4	**945 128**	1 654 385	**-**	-
Investments in subsidiaries	5	**-**	-	**116 590 094**	1
Deferred tax assets	9	**348 333**	1 116 033	**-**	-
Other financial assets	10	**130 296 337**	117 047 021	**23 408 258**	20 889 058
Trust funds	11	**-**	-	**-**	-
Loan to group entity	12	**-**	-	**49 303 691**	-
Total non-current assets		**178 531 137**	164 592 550	**191 305 894**	45 712 877
Current assets					
Inventories	6	**334 438**	276 623	**-**	-
Trade and other receivables	8	**16 489 678**	27 134 495	**3 167 413**	3 548 316
Current tax assets		**114 688**	156 767	**-**	-
Loan to group entity	12	**-**	-	**696 309**	66 415 093
Cash and cash equivalents	13	**66 460 265**	58 224 320	**14 223 932**	7 117 251
Total current assets		**83 399 069**	85 792 205	**18 087 654**	77 080 660
Total assets		**261 930 206**	250 384 755	**209 393 548**	122 793 537
EQUITY AND LIABILITIES					
Equity					
Accumulated surplus		**183 498 377**	157 997 380	**173 136 953**	80 191 579
Reserves		**32 838 114**	32 838 114	**32 838 114**	32 838 114
Total equity		**216 336 491**	190 835 494	**205 975 067**	113 029 693
Current liabilities					
Trade and other payables	14	**45 593 715**	59 549 261	**3 418 481**	9 539 357
Loan from group entity	15	**-**	-	**-**	224 487
Total current liabilities		**45 593 715**	59 549 261	**3 418 481**	9 763 844
Total equity and liabilities		**261 930 206**	250 384 755	**209 393 548**	122 793 537

The accounting policies on pages 138 to 144 and the Notes on pages 145 to 164 form an integral part of the financial statements.

Statement of comprehensive income

FOR THE YEAR ENDED 30 SEPTEMBER 2025

	NOTES	GROUP		ORGANISATION	
		2025	2024	2025	2024
		R	R	R	R
Revenue	16	**148 497 295**	150 151 578	**32 014 397**	41 944 726
Other income	17	**3 659 520**	2 002 940	**86 844**	-
Other expenses	18	**(144 631 338)**	(135 687 860)	**(29 764 596)**	(24 834 359)
Other gains and (losses)	19	**11 913 263**	11 089 919	**85 143 142**	1 075 004
Surplus from operating activities	20	**19 438 740**	27 556 577	**87 479 787**	18 185 371
Finance income	21	**7 272 214**	6 172 582	**5 465 587**	4 897 553
Finance costs	22	**(178)**	-	**-**	-
Surplus before tax		**26 710 776**	33 729 159	**92 945 374**	23 082 924
Income tax (expense)/credit	23	**(1 209 779)**	939 343	**-**	-
Surplus for the year		**25 500 997**	34 668 502	**92 945 374**	23 082 924
Other comprehensive income net of tax		**-**	-	**-**	-
Total comprehensive income		**25 500 997**	34 668 502	**92 945 374**	23 082 924

The accounting policies on pages 138 to 144 and the Notes on pages 145 to 164 form an integral part of the financial statements.

Statement of changes in equity – Group

FOR THE YEAR ENDED 30 SEPTEMBER 2025

	Reserve fund*	Accumulated surplus	Total
	R	R	R
Balance at 1 October 2023	8 872 317	67 407 857	76 280 174
Changes in equity			
Surplus for the year	-	34 668 502	34 668 502
Total comprehensive income for the year	-	34 668 502	34 668 502
Increase through changes in ownership interests in Commercial Producers Trust	-	55 921 021	55 921 021
Levy fund contribution	23 965 797	-	23 965 797
Balance at 30 September 2024	**32 838 114**	**157 997 380**	**190 835 494**
Balance at 1 October 2024	32 838 114	157 997 380	190 835 494
Changes in equity			
Surplus for the year	-	25 500 997	25 500 997
Total comprehensive income for the year	-	25 500 997	25 500 997
Balance at 30 September 2025	**32 838 114**	**183 498 377**	**216 336 491**

Statement of changes in equity – Organisation

FOR THE YEAR ENDED 30 SEPTEMBER 2025

	Reserve fund*	Accumulated surplus	Total
	R	R	R
Balance at 1 October 2023	8 872 317	57 108 655	65 980 972
Changes in equity			
Surplus for the year	-	23 082 924	23 082 924
Total comprehensive income	-	23 082 924	23 082 924
Levy fund contribution	23 965 797	-	23 965 797
Balance at 30 September 2024	**32 838 114**	**80 191 579**	**113 029 693**
Balance at 1 October 2024	**32 838 114**	**80 191 579**	**113 029 693**
Changes in equity			
Surplus for the year	-	92 945 374	92 945 374
Total comprehensive income	-	92 945 374	92 945 374
Balance at 30 September 2025	**32 838 114**	**173 136 953**	**205 975 067**

** Included in Reserves is R3 000 000 which was ringfenced and approved by Congress in 2018.*
R127 683 of this Reserve was utilised in 2021 in line with Congress approval. The remaining balance is R2 872 317.

The accounting policies on pages 138 to 144 and the Notes on pages 145 to 164 form an integral part of the financial statements.

Statement of cash flows

FOR THE YEAR ENDED 30 SEPTEMBER 2025

	NOTES	GROUP 2025 R	GROUP 2024 R	ORGANISATION 2025 R	ORGANISATION 2024 R
Net cash flows from/(used in) operations	27	**9 773 693**	55 155 134	**5 811 924**	(2 904 145)
Dividends received		**-**	-	**31 741**	-
Interest paid		**(178)**	-	**-**	-
Interest received		**2 241 104**	-	**3 129 060**	-
Income taxes paid	28	**(400 000)**	(333 457)	**-**	-
Net cash flows from/(used in) operating activities		**11 614 619**	54 821 677	**8 972 725**	(2 904 145)
Cash flows used in investing activities					
Proceeds from sales of property, plant and equipment		**81 777**	-	**-**	-
Purchase of property, plant and equipment		**(5 840 650)**	(18 787 799)	**-**	-
Purchase of intangible assets		**-**	(775 110)	**-**	-
Proceeds from disposal of other financial assets		**2 380 199**	-	**-**	-
Purchase of other financial assets		**-**	(5 587 468)	**-**	-
Loan advanced to group entity		**-**	-	**-**	(7 600 000)
Proceeds of loan to group entity		**-**	-	**-**	311 626
Cash flows used in investing activities		**(3 378 674)**	(25 150 377)	**-**	(7 288 374)
Cash flows used in financing activities					
Repayments of loans from group companies		**-**	-	**(1 866 044)**	-
Cash flows used in financing activities		**-**	-	**(1 866 044)**	-
Net increase/(decrease) in cash and cash equivalents		**8 235 945**	29 671 300	**7 106 681**	(10 192 519)
Cash and cash equivalents at beginning of the year		**58 224 320**	28 553 020	**7 117 251**	17 309 770
Cash and cash equivalents at end of the year	13	**66 460 265**	58 224 320	**14 223 932**	7 117 251

The accounting policies on pages 138 to 144 and the Notes on pages 145 to 164 form an integral part of the financial statements.

Accounting policies

FOR THE YEAR ENDED 30 SEPTEMBER 2025

1. General information

Grain South Africa Group is incorporated in South Africa. Grain South Africa group of entities (the group) consist of: Grain South Africa a non-profit organisation (the organisation), Phahama Grain Phakama NPC a non-profit company, Nampo (Pty) Ltd a private company with limited assets and activities and Commercial Producers Trust is a trust involved in agricultural research.

The Grain South Africa group of entities and the organisation function to promote the interest of grain producers within South Africa. The registered office is Block C, Alenti Office Park, 457 Witherite Road, The Willows, Pretoria.

2. Basis of preparation and summary of significant accounting policies

These consolidated and separate annual financial statements have been prepared on a going concern basis in accordance and in compliance with the IFRS for SME® Accounting Standard issued by the International Accounting Standards Board. The principal accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all the year presented, unless otherwise stated.

These financial statements have been prepared under the historical cost convention except for other financial assets measured at fair value and are presented in South African rands.

2.1 COMMON CONTROL

Common control transactions

Transactions that involve entities that are controlled by the same party before and after the transaction are referred to as common control transactions. These transactions are excluded under the scope of IFRS for SME® section 19: Business Combinations and therefore the organisation has developed its own policy. The organisation takes into account the particular facts and circumstances surrounding the transaction.

In the prior financial year, assets and liabilities were transferred between holding and subsidiary entities. The organisation has applied predecessor accounting to these transactions. The predecessor method of accounting transfers assets and liabilities at the predecessor carrying values, requiring no fair value measurement. No goodwill is recognised on transfer and any difference between the consideration given and the aggregate carrying value of the assets and liabilities is included in equity. All transfers that occurred within the organisation took place at the carrying values of the assets and liabilities.

The organisation has used the prospective presentation method. Any assets and liabilities are incorporated prospectively from the date on which the business combination between entities under common control occurred. The organisation has used this method as it is impractical to retrospectively present the transaction.

2.2 CONSOLIDATION

Subsidiaries

Subsidiaries are all entities (including special purpose entities) over which the group has control. The group controls an entity when the group is exposed to, or has rights to, variable returns from its involvement with the entity and has the ability to affect those returns through its power over the entity. Subsidiaries are fully consolidated from the date on which control is transferred to the group. They are deconsolidated from the date that control ceases.

The purchase method of accounting is used to account for business combinations that result in the acquisition of subsidiaries by the group. The cost of a business combination is measured as the fair value of the assets given, equity instruments issued and liabilities incurred or assumed at the date of exchange, plus costs directly attributable to the business combination. Identifiable assets acquired and liabilities and contingent liabilities assumed in a business combination are measured initially at their fair values at the acquisition date. Any excess of the cost of the business combination over the acquirer's interest in the net fair value of the identifiable assets, liabilities and contingent liabilities recognised is recorded as goodwill.

Inter-entity transactions, balances and unrealised gains on transactions between group entities are eliminated. Unrealised losses are also eliminated. When necessary, amounts reported by subsidiaries have been adjusted to conform with the group's accounting policies.

Investments in Group companies

Investments in group companies are recognised initially at the transaction price, including transaction costs except where the asset will subsequently be measured at fair value.

Where investments in group companies relate to shares that are publicly traded, or where fair values can be measured reliably without undue cost or effort, these assets are subsequently measured at fair value with the changes in fair value being recognised in profit or loss. Other investments are subsequently measured at cost less impairment.

2.3 SIGNIFICANT JUDGEMENTS AND SOURCES OF ESTIMATION UNCERTAINTY

Critical judgements in applying accounting policies

In preparing the annual financial statements, management is required to make estimates and assumptions that affect the amounts represented in annual financial statements and related disclosures. Use of available information and the application of judgement is inherent in the formation of estimates. Actual results in future could differ from these estimates which may be material to the annual financial statements.

Key sources of estimation uncertainty

Useful lives and residual values of property, plant and equipment

The group and organisation review the residual values and estimated useful lives of property, plant and equipment when changing circumstances indicate that they may have changed since the most recent reporting date. Various factors are considered by management, such as the historical pattern of usage of similar assets, the price obtained for similar assets that have actually been sold and the extent to which the assets capacity will be utilised in the future. When the estimated useful life of an asset differs from previous estimates the change is applied prospectively in the determination of the depreciation charge.

Undue cost or effort

The Grain South Africa Board believes that due to the fact that there are no significant stakeholders to the group to whom the fair value of the investment property will benefit, the obtaining annual valuations for each property, would result in excessive costs (through valuer's fees) in comparison to the benefits that the users of these financial statements would receive from having the information.

The Grain South Africa Board has therefore applied the undue cost or effort exemption in respect of the group's investment properties. As a result, investment property has been transferred to property, plant and equipment and is accounted for in terms of the relevant accounting policy set out in Note 2.7.

2.4 INVESTMENT IN SUBSIDIARIES

An investment in a subsidiary is accounted for at cost less accumulated impairment losses.

2.5 INCOME

Revenue is measured at the fair value of the consideration received or receivable. Revenue is shown net of value-added tax, returns, rebates and discounts.

Revenue for the organisation is defined as administration and management fees, rental income and members contributions.

Revenue for the group is defined as sale of goods, rendering of services, admin and management fees, rental income, members contribution, sponsorships and project income.

Revenue from sale of goods is recognised to the extent that the group has transferred the significant risks and rewards of ownership of goods to the buyer and it is probable that economic benefits associated with the transaction will flow to the group and organisation and the costs incurred or to be incurred in respect of the transaction can be measured reliably.

Sponsorships are voluntary and accounted for when the funds are received.

Management fees and project income are recognised to the extent that the organisation has rendered services under an agreement provided that the amount of revenue can be measured reliably and it is probable that economic benefits will flow to the organisation.

When the outcome of the transaction involving the rendering of services cannot be estimated reliably, income shall be recognised only to the extent of the expenses recognised that are recoverable.

Income received in advance has been deferred under trade and other payables and relates to services that will be delivered in the future.

Members 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.

Other income for the group and organisation consists of donations, sundry income and cost recovery.

Revenue and other 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.

Interest is recognised, in profit or loss, using the effective interest rate method.

Dividends are recognised, in profit or loss, when the organisation's right to receive payment has been established, and is shown as other income.

2.6 INVESTMENT PROPERTY

Investment property is land and buildings held to earn rentals or for capital appreciation or both, rather than for use in the production or supply of goods or services or for administrative purposes; or for sale in the ordinary course of business.

Investment property is initially measured at cost and subsequently at fair value with changes in fair value recognised in profit or loss. Cost includes expenditure that is directly attributable to bringing the asset to the location and condition necessary for it to be capable of operating in the manner intended by management. If the fair value of investment property cannot be measured reliably without undue cost or effort, then it is measured at cost less accumulated depreciation and accumulated impairment.

The group and organisation accounts for investment property as property, plant and equipment using the cost - depreciation - impairment model.

2.7 PROPERTY, PLANT AND EQUIPMENT

Property, plant and equipment are tangible assets which the organisation holds for its own use or for rental to others and which are expected to be used for more than one period.

Property, plant and equipment also include investment property for which fair value cannot be determined without undue cost or effort on an ongoing basis.

An item of property, plant and equipment is recognised as an asset when it is probable that future economic benefits associated with the item will flow to the organisation, and the cost of the item can be measured reliably.

Property, plant and equipment is initially measured at cost.

Cost includes cost incurred initially to acquire or construct an item of property, plant and equipment and costs incurred subsequently to add to, replace part of, or service it. If a replacement cost is recognised in the carrying amount of an item of property, plant and equipment, the carrying amount of the replaced part is derecognised.

The initial estimate of the costs of dismantling and removing an asset and restoring the site on which it is located is also included in the cost of property, plant and equipment, when such dismantling, removal and restoration is obligatory.

Expenditure incurred subsequently for major services, additions to or replacements of parts of property, plant and equipment are capitalised if it is probable that future economic benefits associated with the expenditure will flow to the organisation and the cost can be measured reliably.

Day to day servicing costs are included in profit or loss in the period in which they are incurred.

Property, plant and equipment is subsequently stated at cost less accumulated depreciation and any accumulated impairment losses, except for land which is stated at cost less any accumulated impairment losses.

Land is not depreciated. Depreciation of an asset commences when the asset is available for use as intended by management.

Depreciation is charged to write off the asset's carrying amount over its estimated useful life to its estimated residual value, using a method that best reflects the pattern in which the asset's economic benefits are consumed by the organisation.

The useful lives of property, plant and equipment have been assessed as follows:

Asset class	Useful life/depreciation rate
Land and buildings	0 - 10% Straight line
Machinery	20% Straight line
Motor vehicles	20% Straight line
Fixtures and fittings	20% Straight line
Office equipment	20% Straight line
Computer equipment	20% Straight line
Other fixed asset	20% Straight line

When indicators are present that the useful life and residual values of items of property, plant and equipment have changed since the most recent annual reporting date, they are reassessed. Any changes are accounted for prospectively as a change in accounting estimate.

Impairment tests are performed on property, plant and equipment when there is an indicator that they may be impaired. When the carrying amount of an item of property, plant and equipment is assessed to be higher than the estimated recoverable amount, an impairment loss is recognised immediately in profit or loss to bring the carrying amount in line with the recoverable amount.

An item of property, plant and equipment is derecognised upon disposal or when no future economic benefits are expected from its continued use or disposal. Any gain or loss arising from the derecognition of an item of property, plant and equipment, determined as the difference between the net disposable proceeds, if any, and the carrying amount of the item, is included in profit or loss when the item is derecognised.

2.8 INTANGIBLE ASSETS

Intangible assets have a finite useful life and are carried at cost less accumulated amortisation and any accumulated impairment losses. Amortisation is calculated using the straight-line method to allocate the cost of intangible assets over their estimated useful lives.

Asset class	Useful life/amortisation rate
Computer software	33% Straight line

2.9 FINANCIAL INSTRUMENTS

The group and organisation applies the provisions of Section 11 and 12 of IFRS for SMEs® Accounting Standard.

Initial recognition

A financial instrument is a contract that give rise to a financial asset of one entity and a financial liability or equity instrument in another entity. Financial instruments are recognised initially when the company becomes a party to the contractual provisions of the instruments. The entity classifies financial instruments, or their component parts, on initial recognition as a financial asset, a financial liability or an equity instrument in accordance with the substance of contractual arrangement. Classification is re-assessed on an annual basis.

Initial measurement

Financial instruments are initially measured at the transaction price (including transaction costs except in the initial measurement of financial assets and liabilities that are measured at fair value through profit or loss) unless the arrangement constitutes, in effect, a financing transaction in which case it is measured at the present value of the future payments discounted at a market rate of interest for a similar debt instrument.

Financial instruments at amortised cost

These include trust funds, loan to (from) group entities, cash and cash equivalents, trade and other receivables, and trade and other 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 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.

Financial instruments at fair value

All other financial instruments, including other financial assets, including equity instruments that are publicly traded or whose fair value can otherwise be measured reliably, without undue cost or effort, are measured at fair value through profit and loss.

Financial instruments at cost

Equity instruments that are not publicly traded and whose fair value cannot otherwise be measured reliably are measured at cost less impairment. This includes equity instruments held in unlisted investments.

Trade and other receivables

Trade receivables are measured at initial recognition at transaction price and subsequently calculated at amortised cost using the effective interest rate method, less provision for impairment. Appropriate provisions for estimated irrecoverable amounts are recognised in profit or loss when there is objective proof that the assets is irrecoverable. Significant financial problems of the debtor, the likelihood that the debtor will be declared bankrupt or undergo financial restructuring and default on arrears of payments are considered as indicators that trade debtors are subject to impairment. The recognised provisions are calculated as the difference between the asset's carrying amount and the present value of the estimated future cash flow, discounted at the effective interest rate method with initial recognition.

Trade and other receivables are classified as financial assets at amortised cost.

Other financial assets

Other financial assets are recognised initially at the transaction price, including transaction costs except where the asset will subsequently be measured at fair value.

Where other financial assets relate to shares that are publicly traded, or where fair values can be measured reliably without undue cost or effort, these assets are subsequently measured at fair value with the changes in fair value being recognised in profit or loss. Other investments are subsequently measured at cost less impairment.

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.

Cash and cash equivalents are classified as financial assets at amortised cost.

Trade payables

Trade payables are recognised initially at the transaction price and subsequently measured at amortised cost using the effective interest rate method.

Trade and other payables are classified as financial liabilities at amortised cost.

Loans to and from group entities

These include loans to and from subsidiaries and related parties which are recognised initially at fair value plus direct transaction costs.

Loans to and from related parties are classified as financial assets of liabilities at amortised cost.

Derecognition

Financial assets

A financial asset (or, where applicable, a part of a financial asset or part of a group of similar financial assets) is derecognised when the contractual rights to the cash flows from the asset expire, or it transfers the rights to receive the contractual cash flows on the financial asset in a transaction in which substantially all the risks and rewards of ownership or control of the financial assets are transferred.

Financial liabilities

A financial liability is derecognised when the obligation under the liability is discharged, cancelled or expires. Where an existing financial liability is replaced by another from the same lender on substantially different terms, or the terms of an existing liability are substantially modified, such an exchange or modification is treated as a derecognition of the original liability and the recognition of a new liability, and the difference in the respective carrying amounts is recognised in profit or loss.

2.10 INVENTORIES

Inventories consists of beverages, diesel and agricultural goods.

Inventories are measured at the lower of cost and estimated selling price less costs to complete and sell, on the weighted average cost basis.

2.11 TAX

Current tax assets and liabilities

Current tax for current and prior periods is, to the extent unpaid, recognised as a liability. If the amount already paid in respect of current and prior periods exceeds the amount due for those periods, the excess is recognised as an asset.

The tax liability reflects the effect of the possible outcomes of a review by the tax authorities.

Deferred tax assets and liabilities

A deferred tax liability is recognised for all taxable temporary differences. A deferred tax asset is recognised for all deductible temporary differences to the extent that it is probable that taxable profit will be available against which the deductible temporary difference can be utilised.

Deferred tax asset is recognised for the carry forward of unused tax losses to the extent that it is probable that future taxable profit will be available against which the unused tax losses can be utilised.

When management assess the extent to which is it probable that taxable profit will be available against which potential deferred tax assets can be utilised, they take into consideration that the utilisation of assessed losses are limited to the greater of 80% of the taxable income or R1 million in the year of assessment.

Deferred tax assets and liabilities are measured at the tax rates that are expected to apply to the period when the asset is realised or the liability is settled, based on tax rates (and tax laws) that have been enacted or substantively enacted by the end of the reporting period.

Deferred income tax assets and liabilities are offset when there is a legally enforceable right to offset current tax assets against current tax liabilities and when the deferred income tax assets and liabilities relate to income taxes levied by the same taxation authority on either the same taxable entity or different taxable entities where there is an intention to settle the balances on a net basis.

Tax expenses

Tax expense is recognised in the same component of total comprehensive income or equity as the transaction or other event that resulted in the tax expense.

2.12 LEASES

A lease is classified as a finance lease if it transfers substantially all the risks and rewards incidental to ownership to the lessee. All other leases are operating leases. A lease is classified as an operating lease if it does not transfer substantially all the risks and rewards incidental to ownership.

Operating leases as 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 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 as 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.

2.13 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.

2.14 EMPLOYEE BENEFIT OBLIGATIONS

Short-term employee benefits

The cost of short-term employee benefits, (those payable within 12 months after the service is rendered, such as paid vacation leave 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.

Defined contribution plans

Payments to defined contribution retirement benefit plans are charged as an expense as they fall due.

2.15 BORROWING COSTS

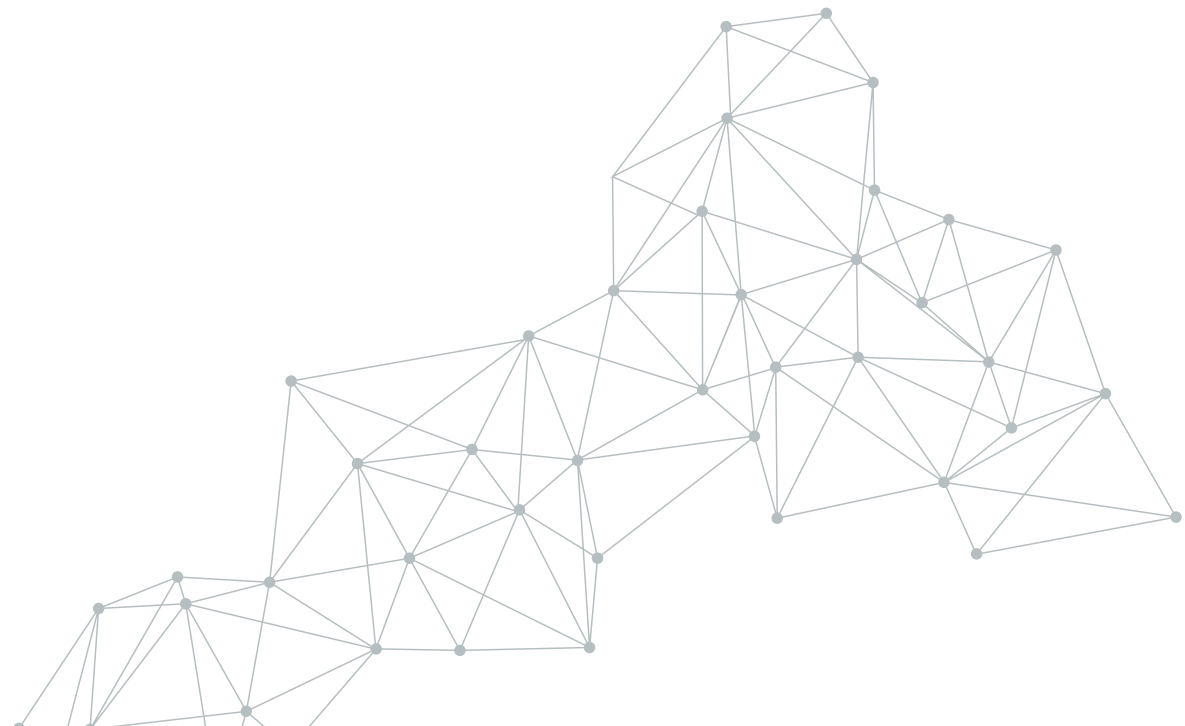
All borrowing costs are recognised in surplus or deficit in the period in which they are incurred.

2.16 IMPAIRMENT OF NON-FINANCIAL ASSETS

The group and organisation assesses at each reporting date whether there is any indication that property, plant and equipment and intangible assets 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 gets reversed, 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.



3. Property, plant and equipment

Balances at year end and movements for the year:

	GROUP							
	Land and buildings	Machinery	Motor vehicles	Fixtures and fittings	Office equipment	Computer equipment	Other fixed asset	Total
	R	R	R	R	R	R	R	R
Reconciliation for the year ended 30 September 2025 – Group								
Balance at 1 October 2024								
At cost	68 648 765	5 155 553	1 553 566	371 499	261 118	2 009 416	356 285	78 356 202
Accumulated depreciation	(32 066 863)	(416 424)	(469 718)	(175 033)	(20 874)	(370 467)	(61 712)	(33 581 091)
Carrying amount	**36 581 902**	**4 739 129**	**1 083 848**	**196 466**	**240 244**	**1 638 949**	**294 573**	**44 775 111**
Movements for the year ended 30 September 2025								
Additions	5 084 010	149 500	-	289 035	-	297 063	21 042	5 840 650
Depreciation	(1 715 035)	(933 413)	(355 316)	(118 141)	(47 017)	(424 379)	(70 051)	(3 663 352)
Disposals	-	-	-	(9 483)	-	(1 587)	-	(11 070)
Property, plant and equipment at the end of the year	**39 950 877**	**3 955 216**	**728 532**	**357 877**	**193 227**	**1 510 046**	**245 564**	**46 941 339**
Closing balance at 30 September 2025								
At cost	73 732 776	5 305 053	1 553 566	644 755	261 118	2 267 405	377 327	84 142 000
Accumulated depreciation	(33 781 899)	(1 349 837)	(825 034)	(286 878)	(67 891)	(757 359)	(131 763)	(37 200 661)
Carrying amount	**39 950 877**	**3 955 216**	**728 532**	**357 877**	**193 227**	**1 510 046**	**245 564**	**46 941 339**

3. Property, plant and equipment (continued)

	GROUP							
	Land and buildings	Machinery	Motor vehicles	Fixtures and fittings	Office equipment	Computer equipment	Other fixed asset	Total
	R	R	R	R	R	R	R	R
Reconciliation for the year ended 30 September 2024 – Group								
Balance at 1 October 2023								
At cost	56 456 297	3 726 386	1 739 332	2 716 967	405 341	3 653 153	651 862	69 349 338
Accumulated depreciation	(29 999 261)	(3 329 360)	(304 380)	(2 431 040)	(399 634)	(2 952 530)	(513 689)	(39 929 894)
Carrying amount	**26 457 036**	**397 026**	**1 434 952**	**285 927**	**5 707**	**700 623**	**138 173**	**29 419 444**
Movements for the year ended 30 September 2024								
Additions	12 192 468	4 758 527	9 429	73 905	255 165	1 280 193	218 112	18 787 799
Depreciation	(2 067 602)	(416 424)	(360 533)	(163 366)	(20 628)	(341 867)	(61 712)	(3 432 132)
Property, plant and equipment at the end of the year	**36 581 902**	**4 739 129**	**1 083 848**	**196 466**	**240 244**	**1 638 949**	**294 573**	**44 775 111**
Closing balance at 30 September 2024								
At cost	68 648 765	5 155 553	1 553 566	371 499	261 118	2 009 416	356 285	78 356 202
Accumulated depreciation	(32 066 863)	(416 424)	(469 718)	(175 033)	(20 874)	(370 467)	(61 712)	(33 581 091)
Carrying amount	**36 581 902**	**4 739 129**	**1 083 848**	**196 466**	**240 244**	**1 638 949**	**294 573**	**44 775 111**

	ORGANISATION							
	Land and buildings	Machinery	Motor vehicles	Fixtures and fittings	Office equipment	Computer equipment	Other fixed asset	Total
	R	R	R	R	R	R	R	R
Reconciliation for the year ended 30 September 2025 – Organisation								
Balance at 1 October 2024								
At cost	56 456 296	-	-	-	-	-	-	56 456 296
Accumulated depreciation	(31 632 478)	-	-	-	-	-	-	(31 632 478)
Carrying amount	**24 823 818**	**-**	**-**	**-**	**-**	**-**	**-**	**24 823 818**
Movements for the year ended 30 September 2025								
Depreciation	(1 341 376)	-	-	-	-	-	-	(1 341 376)
Disposals*	(21 478 591)	-	-	-	-	-	-	(21 478 591)
Property, plant and equipment at the end of the year	**2 003 851**	**-**	**-**	**-**	**-**	**-**	**-**	**2 003 851**
Closing balance at 30 September 2025								
At cost	2 003 851	-	-	-	-	-	-	2 003 851
Accumulated depreciation	-	-	-	-	-	-	-	-
Carrying amount	**2 003 851**	**-**	**-**	**-**	**-**	**-**	**-**	**2 003 851**

** The disposals refer to the assets which formed part of the sale of business (see Note 24).*

3. Property, plant and equipment (continued)

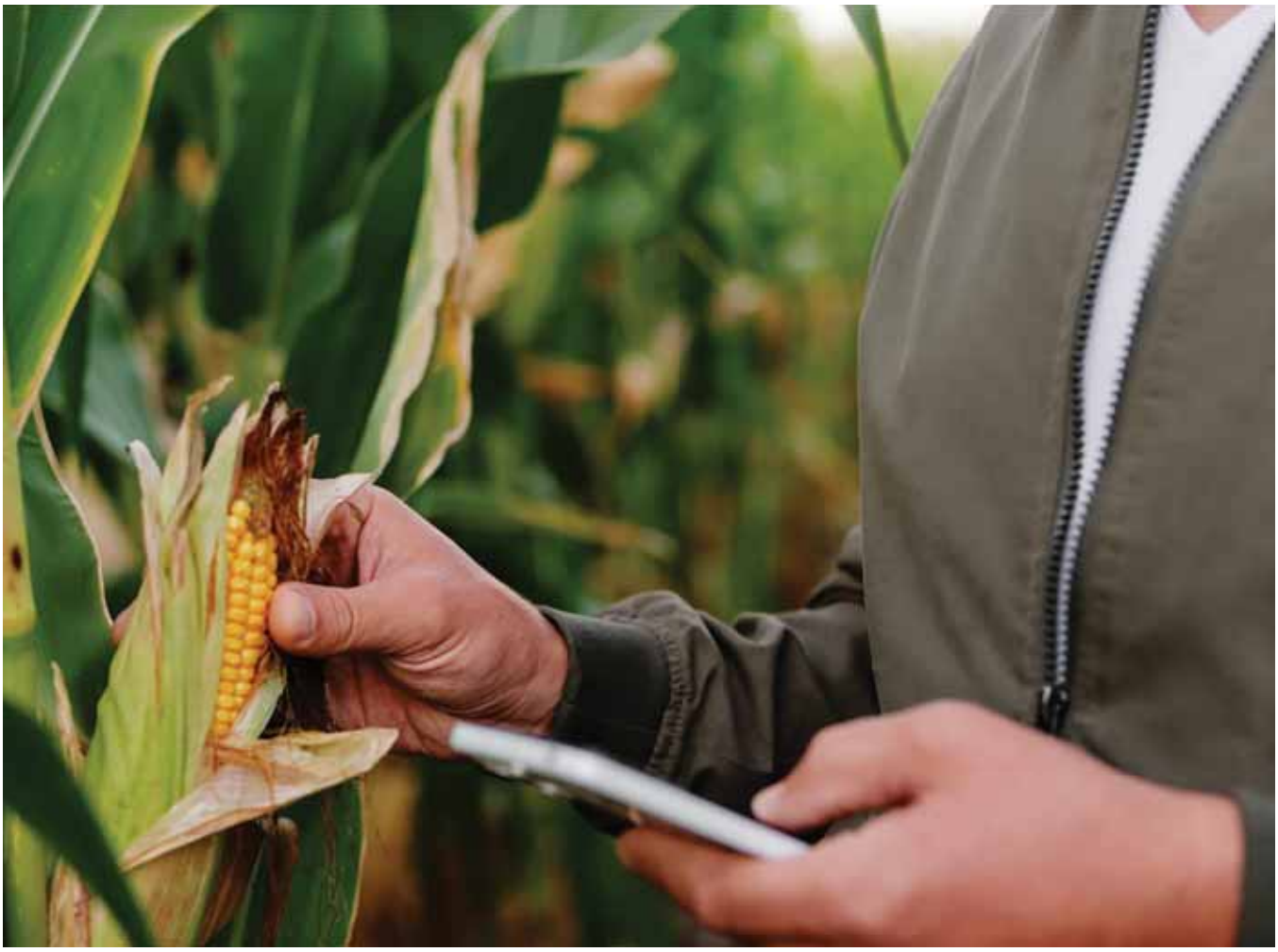
	ORGANISATION							
	Land and buildings	Machinery	Motor vehicles	Fixtures and fittings	Office equipment	Computer equipment	Other fixed asset	Total
	R	R	R	R	R	R	R	R
Reconciliation for the year ended 30 September 2024 – Organisation								
Balance at 1 October 2023								
At cost	56 456 297	3 726 286	364 583	2 646 091	404 012	3 435 270	651 862	67 684 401
Accumulated depreciation	(29 999 261)	(3 329 360)	(195 196)	(2 419 373)	(399 388)	(2 914 556)	(513 689)	(39 770 823)
Carrying amount	**26 457 036**	**396 926**	**169 387**	**226 718**	**4 624**	**520 714**	**138 173**	**27 913 578**
Movements for the year ended 30 September 2024								
Depreciation	(1 633 218)	-	-	-	-	-	-	(1 633 218)
Disposals	-	(396 926)	(169 387)	(226 718)	(4 624)	(520 714)	(138 173)	(1 456 542)
Property, plant and equipment at the end of the year	**24 823 818**	**-**	**-**	**-**	**-**	**-**	**-**	**24 823 818**
Closing balance at 30 September 2024								
At cost	56 456 296	-	-	-	-	-	-	56 456 296
Accumulated depreciation	(31 632 478)	-	-	-	-	-	-	(31 632 478)
Carrying amount	**24 823 818**	**-**	**-**	**-**	**-**	**-**	**-**	**24 823 818**

3. Property, plant and equipment (continued)

3.2 ADDITIONAL DISCLOSURES

1. Remainder of the farm Marthaville 911, Bothaville district, Province Free State;*
2. Section 6 (2) of the farm Rietfontein Hart 512, Bothaville district, Province Free State;
3. Remainder of Portion 2 of the farm Rietfontein Hart 512, Bothaville district, Province Free State;
4. The farm Nampo 1203, Bothaville district, Province Free State;
5. Remainder of the farm Doorpan South 858, Bothaville district, Province Free State;
6. Section 3 of the farm Eden 327, Bothaville district, Province Free State;
7. Unit 10, 11, 12 and 13 on the Sectional Plan no. SS096/2012 in the scheme known as SS Alenti Office Park, City of Tshwane Metropolitan Municipality held under Deed of Transfer ST12932/2012.*

** Refer to Note 24 (Disposal of business activities) in respect of the sale of properties 1 and 7 above.*













4. Intangible assets

Reconciliation of changes in intangible assets:

	Computer software
	R
Reconciliation for the year ended 30 September 2025 – Group	
Balance at 1 October 2024	
At cost	2 197 486
Accumulated amortisation	(543 101)
Carrying amount	1 654 385
Movements for the year ended 30 September 2025	
Amortisation	(709 258)
Intangible assets at the end of the year	945 128
Closing balance at 30 September 2025	
At cost	2 197 486
Accumulated amortisation	(1 252 358)
Carrying amount	945 128
Reconciliation for the year ended 30 September 2024 – Group	
Balance at 1 October 2023	
At cost	3 301 973
Accumulated amortisation	(1 879 597)
Carrying amount	1 422 376
Movements for the year ended 30 September 2024	
Acquisitions	775 110
Amortisation	(543 101)
Intangible assets at the end of the year	1 654 385
Closing balance at 30 September 2024	
At cost	2 197 486
Accumulated amortisation	(543 101)
Carrying amount	1 654 385
Reconciliation for the year ended 30 September 2024 – Organisation	
Balance at 1 October 2023	
At cost	3 301 973
Accumulated amortisation	(1 879 597)
Carrying amount	1 422 376
Movements for the year ended 30 September 2024	
Disposals*	(1 422 376)
Intangible assets at the end of the year	-
Closing balance at 30 September 2024	
At cost	-
Accumulated amortisation	-
Carrying amount	-

** The disposals refer to the assets which formed part of the sale of business (see Note 24).*

5. Investments in subsidiaries

The amounts included on the statements of financial position comprise the following:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Investments in subsidiaries	-	-	116 590 094	1
Investment in subsidiary:				
Carrying amount of investments in subsidiaries				
Nampo (Pty) Ltd	-	-	116 590 094	1

The subsidiary is incorporated in South Africa and share the year end of the group. The carrying amounts of subsidiary is shown gross of impairment losses.

6. Inventories

Inventories comprise:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Beverages	166 665	276 623	-	-
Agricultural goods	81 965	-	-	-
Diesel	85 808	-	-	-
	334 438	276 623	-	-

The cost of inventory recognised as an expense amounted to R3 791 019 (2024: R3 092 443).

7. Financial assets

Carrying amount of financial assets by category:

	GROUP		
	At fair value through surplus or deficit	Debt instruments at amortised cost	Total
	R	R	R
Year ended 30 September 2025			
Other financial assets (Note 10)	130 296 337	-	130 296 337
Trade and other receivables excluding non-financial assets (Note 8)	-	14 187 968	14 187 968
Cash and cash equivalents (Note 13)	-	66 460 265	66 460 265
	130 296 337	**80 648 233**	**210 944 570**
Year ended 30 September 2024			
Other financial assets (Note 10)	117 047 021	-	117 047 021
Trade and other receivables excluding non-financial assets (Note 8)	-	24 619 411	24 619 411
Cash and cash equivalents (Note 13)	-	58 224 320	58 224 320
	117 047 021	**82 843 731**	**199 890 752**

	ORGANISATION		
	At fair value through surplus or deficit	Debt instruments at amortised cost	Total
	R	R	R
Year ended 30 September 2025			
Other financial assets (Note 10)	23 408 258	-	23 408 258
Loan to group entity (Note 12)	-	50 000 000	50 000 000
Trade and other receivables excluding non-financial assets (Note 8)	-	3 167 413	3 167 413
Cash and cash equivalents (Note 13)	-	14 223 932	14 223 932
	23 408 258	**67 391 345**	**90 799 603**
Year ended 30 September 2024			
Other financial assets (Note 10)	20 889 058	-	20 889 058
Loan to group entity (Note 12)	-	66 415 093	66 415 093
Trade and other receivables excluding non-financial assets (Note 8)	-	2 146 007	2 146 007
Cash and cash equivalents (Note 13)	-	7 117 251	7 117 251
	20 889 058	**75 678 351**	**96 567 409**

8. Trade and other receivables

Trade and other receivables comprise:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Trade receivables	**14 132 347**	24 555 086	**2 656 792**	1 967 954
Trade receivables – related parties	**-**	-	**337 658**	-
Trade receivables impairment	**(159 866)**	(120 998)	**-**	-
Trade receivables – net	**13 972 481**	24 434 088	**2 994 450**	1 967 954
Sundry debtors	**35 254**	-	**-**	-
Prepaid expenses	**1 369 122**	622 721	**-**	-
Deposits	**180 233**	185 323	**172 963**	178 053
Value added tax	**932 588**	1 892 363	**-**	1 402 309
Total trade and other receivables	**16 489 678**	27 134 495	**3 167 413**	3 548 316

9. Deferred tax

9.1 DETAILS OF SET-OFF OF DEFERRED TAX ASSETS AND LIABILITIES

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Wear and tear	**(184 638)**	(91 523)	**-**	-
Other financial assets	**(1 174 115)**	(582 693)	**-**	-
Provision for doubtful debts	**32 373**	24 502	**-**	-
Income received in advance	**795 116**	733 576	**-**	-
Accrued employee cost	**744 868**	606 257	**-**	-
Interest not allowed	**504 392**	425 914	**-**	-
Prepaid expenses	**(369 663)**	-	**-**	-
Total deferred tax asset per the statements of financial position	**348 333**	1 116 033	**-**	-

9.2 RECONCILIATION OF DEFERRED TAX MOVEMENTS

	GROUP
Opening balance at 1 October 2024	1 116 033
Wear and tear	(91 314)
Other financial assets	(591 421)
Provision for doubtful debts	7 871
Income received in advance	61 539
Accrued employee cost	136 811
Interest not allowed	78 477
Prepaid expenses	(369 663)
Closing balance at 30 September 2025	**348 333**
Wear and tear	(91 523)
Other financial assets	(582 693)
Provision for doubtful debts	24 502
Income received in advance	733 576
Accrued employee cost	606 257
Interest not allowed	425 914
Closing balance at 30 September 2024	**1 116 033**

10. Other financial assets

Other financial assets at fair value incorporates the following balances:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Sanlam investments – Commercial Producers Trust	**68 010 383**	61 814 749	**-**	-
Sanlam Investments – Nampo (Pty) Ltd	**29 886 466**	26 443 437	**-**	-
Sanlam investments – Grain South Africa	**23 087 638**	20 273 468	**23 087 638**	20 273 468
Sanlam investments – Phahama Grain Phakama NPC	**8 991 230**	7 899 777	**-**	-
Senwes Limited	**320 620**	615 590	**320 620**	615 590
	130 296 337	117 047 021	**23 408 258**	20 889 058

The fair values of the investments are based on the quoted market price on date of reporting.

11. Trust funds

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Recapitalisation project (RECAP)				
Trust funds	**281 627**	263 721	**-**	-
Trust payable	**(281 627)**	(263 721)	**-**	-
	-	-	**-**	-
Eastern Cape Mechanisation				
Trust funds	**330 798**	310 472	**-**	-
Trust payable	**(330 798)**	(310 472)	**-**	-
	-	-	**-**	-
Beyond Abundance				
Trust funds	**22 829 287**	3 232 557	**-**	-
Trust payable	**(22 829 287)**	(3 232 557)	**-**	-
	-	-	**-**	-
ABInbev				
Trust funds	**1 300 348**	2 901 638	**-**	-
Trust payable	**(1 300 348)**	(2 901 638)	**-**	-
	-	-	**-**	-
SACTA				
Trust funds	**3 376 679**	2 739 320	**-**	-
Trust payable	**(3 376 679)**	(2 739 320)	**-**	-
	-	-	**-**	-
Standard Bank & Kgodiso Trust project				
Trust funds	**104 066**	97 450	**-**	-
Trust payable	**(104 066)**	(97 450)	**-**	-
	-	-	**-**	-
Maize Trust				
Trust funds	**769 839**	688 540	**-**	-
Trust payable	**(769 839)**	(688 540)	**-**	-
	-	-	**-**	-
OPDT				
Trust funds	**220 758**	265 871	**-**	-
Trust payable	**(220 758)**	(265 871)	**-**	-
	-	-	**-**	-
PGP Distress Funds				
Trust funds	**1 331 559**	-	**-**	-
Trust payable	**(1 331 559)**	-	**-**	-
	-	-	**-**	-

12. Loan to group entity

Loan to group entity comprises the following balances:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Loans to Nampo (Pty) Ltd	-	-	**50 000 000**	66 415 093
Non-current assets	-	-	**49 303 691**	-
Current assets	-	-	**696 309**	66 415 093
	-	-	**50 000 000**	66 415 093

LOAN AND SUBORDINATION AGREEMENT

In 2024 Grain South Africa issued an unsecured loan (see above 2024 balance), of which R 50 000 000 bears interest at 9,25%. The accrued interest is included in the loan balance. This loan was subordinated under a subordination agreement between Grain South Africa and the company, which remained effective for the shorter of 12 months or until the company's assets, measured at fair value, exceeded its liabilities. Additionally, Grain South Africa provided a letter of continued financial support. The loan was intended to be settled during the 2025 financial year upon completion of the 'sale of business' transaction. (See Note 24 - Disposal of business activities).

During the reporting period, the company's assets at fair value exceeded its liabilities; therefore, the subordination agreement and the letter of support are no longer required.

LOAN PAYABLE TO SELLER

As part of the purchase consideration for the disposal of the Business (refer Note 24 – Disposal of business activities), a loan payable to Grain South Africa of R 50 000 000 was recognised on 1 September 2025, the completion date of the transaction. This loan is unsecured and bears interest at a variable rate equal to the South African Repo Rate plus 1%. The principal and accrued interest are repayable over 25 years in quarterly instalments, commencing November 2025. Immediate repayment is required upon certain default events, including unsatisfied judgments, attachment of assets, insolvency, liquidation, or arrangements with creditors. The business is currently not aware that any of the preceding default events have been triggered.

13. Cash and cash equivalents

Cash and cash equivalents included in current assets:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Cash				
Cash on hand	**4 156**	9 005	**-**	-
Balances with banks	**39 222 591**	27 191 406	**7 331 024**	3 973 488
	39 226 747	27 200 411	**7 331 024**	3 973 488
Cash equivalents				
Short term investments	**27 233 518**	31 023 909	**6 892 908**	3 143 763
	66 460 265	58 224 320	**14 223 932**	7 117 251
Net cash and cash equivalents:				
Current assets	**66 460 265**	58 224 320	**14 223 932**	7 117 251

14. Trade and other payables

Trade and other payables comprise:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Trade payables	**30 793 420**	35 139 529	**487 323**	1 156 639
Trade payables – related parties	**-**	-	**179 871**	5 892 454
Income received in advance	**7 218 613**	17 576 400	**-**	-
Accrued employee costs	**4 676 215**	4 268 068	**-**	-
Other payables	**2 905 467**	2 565 264	**2 568 397**	2 490 264
Value added tax	**-**	-	**182 890**	-
Total trade and other payables	**45 593 715**	59 549 261	**3 418 481**	9 539 357

15. Loan from group entity

Loan from group entity comprise:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Commercial Producers Trust	**-**	-	**-**	224 487
This loan does not bear interest.				

16. Revenue

Revenue comprises:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Admin and management fees received	**11 710 836**	9 099 696	**-**	-
Members contributions	**30 302 559**	40 119 847	**30 302 559**	40 314 404
Sponsorships	**2 961 220**	6 941 406	**-**	-
Rendering of services	**70 901 543**	69 493 481	**-**	-
Rental income	**2 313 257**	2 252 857	**1 711 838**	1 630 322
Project income	**22 766 105**	15 139 081	**-**	-
Sale of goods	**7 541 775**	7 105 210	**-**	-
Total revenue	**148 497 295**	150 151 578	**32 014 397**	41 944 726

17. Other income

Other income comprises:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Cost recovery	**3 526 708**	2 002 940	**-**	-
Commercial income	**132 812**	-	**86 844**	-
Total other income	**3 659 520**	2 002 940	**86 844**	-

18. Other expenses

Other items requiring separate disclosure:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Auditors remuneration – fees	**1 014 335**	927 622	**360 389**	728 453
Bad debts	**133 020**	128 900	**-**	-
Employee benefit expenses	**36 881 103**	34 488 298	**-**	-
Professional services	**1 758 137**	2 520 303	**27 556**	24 860
Repairs and maintenance	**3 480 050**	3 218 832	**-**	-

19. Other gains and (losses)

Other gains and (losses) comprise:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Gain or (loss) on disposal of assets	**70 707**	(18 547)	**83 321 410**	-
Gain or (loss) on foreign exchange differences	**(3 482)**	(1 504)	**-**	-
Other fair value gains and (losses)	**11 846 038**	11 109 970	**1 821 732**	1 075 004
Total other gains and (losses)	**11 913 263**	11 089 919	**85 143 142**	1 075 004

20. Surplus from operating activities

Surplus from operating activities includes the following separately disclosable items:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Other operating expenses				
Property plant and equipment – depreciation	**3 663 352**	3 432 132	**1 341 376**	1 633 217
Intangible assets – amortisation	**709 258**	543 101	**-**	-

21. Finance income

Finance income comprises:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Interest received	**5 832 596**	4 738 743	**928 723**	13 086
Interest received from subsidiaries	**-**	-	**4 250 000**	4 625 000
Dividends received	**1 439 618**	1 433 839	**286 864**	259 467
Total finance income	**7 272 214**	6 172 582	**5 465 587**	4 897 553

22. Finance costs

Finance costs included in surplus or deficit:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Bank	**178**	-	**-**	-

23. Income tax expense/(credit)

Grain SA is exempt in terms of section 30B of the Income Tax Act and as such all its income is exempt from income tax in terms of section 10(1)(d)(iv)(bb) of the Act.

Phahama Grain Phakhama meets the requirements of a Public Benefit Organisation set out in section 30(3) of the Income Tax Act 58 of 1962. The entity is exempt from income tax in terms of section 10(1)(cN) of the Act.

Commercial Producers Trust qualifies for the income tax exemption in terms of Article 10(1)(cN) and 20; and paragraph 8 of the Ninth Schedule of the Act.

Nampo provides for income tax in terms of the requirements of the Income Tax Act.

23.1 INCOME TAX RECOGNISED IN SURPLUS OR DEFICIT:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Current tax				
Current year	**442 079**	176 690	**-**	-
Deferred tax				
Current year	**767 700**	(1 116 033)	**-**	-
Total income tax expense/(credit)	**1 209 779**	(939 343)	**-**	-

23.2 THE INCOME TAX FOR THE YEAR CAN BE RECONCILED TO THE ACCOUNTING SURPLUS AS FOLLOWS:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Surplus before tax from operations	**26 710 776**	33 729 159	**92 945 374**	23 082 924
Income tax calculated at 27%	**7 211 910**	9 106 873	**25 095 251**	6 232 389
Tax effect of				
Exempt income	**(5 759 534)**	(9 432 099)	**(25 095 251)**	(6 232 389)
Dividends received	**(75 357)**	(79 930)	**-**	-
Land and buildings – permanent difference	**-**	117 284	**-**	-
Investment fees attributable to exempt fees	**9 056**	10 183	**-**	-
Fair value adjustments not taxable (20%)	**(147 855)**	(145 673)	**-**	-
Legal and consulting fees	**88 843**	112 183	**-**	-
Take on difference – Leave pay provision	**-**	(493 587)	**-**	-
Assessed loss recognised	**-**	(134 577)	**-**	-
Deferred tax – prior year under provision	**(117 284)**	-	**-**	-
Tax charge	**1 209 779**	(939 343)	**-**	-

24. Disposal of business activities

Restructuring of business activities:

During the previous year Nampo (Pty) Ltd, a wholly owned subsidiary acquired the non-membership operations of Grain South Africa as a going concern.

The transfer of immovable property, being the properties listed as 1 and 7 under Note 3 to the financial statements, is reliant on the approval by members at the Congress of Grain South Africa group.

The financial statement items sold as part of the transaction:

	Nampo (Pty) Ltd	Total
	R	R
Cash and cash equivalents	43 544 462	43 544 462
Accounts receivable	12 677 205	12 677 205
Accounts payable	(4 954 098)	(4 954 098)
Other debtors	510 053	510 053
Movable assets	1 456 542	1 456 542
Intangible assets	1 422 376	1 422 376
Borrowings	24 432 695	24 432 695
Business liabilities	(17 617 147)	(17 617 147)
Inventory	318 005	318 005
Subtotal	**61 790 093**	**61 790 093**
Interest accrued (Note 12 and 21)	4 625 000	4 625 000
Loan advanced (Note 12)	**66 415 093**	**66 415 093**

The final purchase price was contingent on the approval of the disposal of two immovable properties by the Congress of Grain South Africa that was held in March 2025. The approval was duly obtained. The final purchase price includes the two properties below (fairly valued) as well as the loan that already existed (subtotal for 2024 above and Note 13).

	2025
	Amount
1. Remainder of the farm Marthaville 911, Bothaville district, Province Free State – known as NAMPO Park;	91 800 000
2. Unit no. 10, 11, 12 and 13 on the Sectional Plan no. SS096/2012 in the scheme known as SS Alenti Office.	13 000 000
Loan before accrued interest also Note 12.	61 790 092
Total	**166 590 092**
The final purchase price is to be settled with a loan of R 50 000 000 (see Note 12) and issuing one no par value share for the remainder of the purchase price.	
Loan (Note 12)	50 000 000
Share – no par value	116 590 092
Total purchase consideration	**166 590 092**

25. Events during and after the reporting date

The Grain South Africa Board is not aware of any matter or circumstance arising since the end of the financial year to the date of this report that could have a material affect on the financial position of the group of entities and the organisation.

26. Going concern

The group of entities and separate organisation's annual financial statements have been prepared on the basis of accounting policies applicable to a going concern. This basis presumes that funds will be available to finance future operations and that the realisation of assets and settlement of liabilities, contingent obligations and commitments will occur in the ordinary course of business.

Cash flow forecasts are prepared and monitored on a continuous basis. The Grain South Africa Board is satisfied that the group of entities and separate organisation have a sound financial position and that it has access to sufficient resources to continue trading in the foreseeable future and accordingly the financial statements have been prepared on a going concern basis.

The Grain South Africa Board is not aware of any new material changes that may adversely affect the group of entities and separate organisation. The Grain South Africa Board is also not aware of any material non-compliance with statutory or regulatory requirements or any pending changes to legislation that may affect the group of entities and the organisation.

27. Cash flows from operating activities

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Surplus after tax	**25 500 997**	34 668 502	**92 945 374**	23 082 924
Adjustments for:				
Business disposal	**-**	-	**-**	(12 568 762)
Depreciation and amortisation	**4 372 609**	3 975 233	**1 341 376**	1 633 217
Fair value gains and losses	**(11 846 038)**	(11 109 970)	**(1 821 732)**	(1 075 004)
Finance costs	**178**	-	**-**	-
Finance income	**(5 832 595)**	(6 172 582)	**(5 178 723)**	(4 871 381)
Gains on disposal of non-current assets	**(70 707)**	-	**(83 321 409)**	-
Gains on foreign exchange realised in surplus or deficit	**3 482**	-	**-**	-
Impairment losses and reversal of impairment losses recognised in surplus or deficit	**-**	128 900	**-**	-
Income tax expense	**1 209 779**	(939 343)	**-**	-
Levy contribution	**-**	-	**-**	4 556 802
Non-cash movement in loans to group companies	**-**	-	**7 661 925**	-
Levy fund reserve take-on	**-**	23 965 797	**-**	-
Non-cash movement in other financial assets	**1 215 891**	475 049	**211 948**	-
Dividends received	**(1 407 877)**	-	**(286 864)**	-
Change in operating assets and liabilities:				
(Increase)/decrease in inventories	**(57 815)**	41 382	**-**	-
Increase/(decrease) in trade receivables	**10 641 335**	(988 191)	**380 903**	(2 083 324)
(Decrease)/increase in trade accounts payable	**(13 955 546)**	11 110 357	**(6 120 874)**	(11 578 617)
Net cash flows from/(used in) operations	**9 773 693**	55 155 134	**5 811 924**	(2 904 145)

28. Income tax paid

Income tax paid:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	R	R
Amounts receivable/(payable) at the beginning of the year	**156 767**	-	**-**	-
Amounts (receivable)/payable at the end of the year	**(114 688)**	(156 767)	**-**	-
Taxation expense/(credit)	**(1 209 779)**	939 343	**-**	-
Less deferred tax included in taxation expense	**767 700**	(1 116 033)	**-**	-
	(400 000)	(333 457)	**-**	-

29. Related parties

29.1 GROUP ENTITIES

Subsidiaries	Refer to Note 5

29.2 OTHER RELATED PARTIES

Entity name	Nature of relationship
Phahama Grain Phakama NPC	Entity overseen by key management
Commercial Producers Trust	Entity involvement by key management
OT Doyer	Key management
RP Krige	Key management
JM Mathebula	Key management
DJM Minnaar	Key management

The Board as set out in Note 4 of the Grain South Africa Board report.

29.3 MANAGEMENT REMUNERATION:

	GROUP		ORGANISATION	
	2025	2024	2025	2024
	R	R	**R**	R
Grain South Africa Board management*				
Emoluments	**1 653 912**	1 628 937	**-**	-
Re-imbursive claims paid relating to travel and accommodation	**619 910**	733 679	**-**	-
	2 273 822	2 362 616	**-**	-

** Compensation is paid by Nampo (Pty) Ltd for services rendered to the group.*

29.4 RELATED PARTY TRANSACTIONS AND BALANCES

	ORGANISATION			
	Nampo (Pty) Ltd	Phahama Grain Phakama NPC	Commercial Producers Trust	Total
	R	R	R	R
Year ended 30 September 2025				
Related party transactions				
Services paid	25 223 955	-	-	25 223 955
Donations	-	675 305	-	675 305
Interest received	(4 250 000)	-	-	(4 250 000)
Outstanding balances for related party transactions				
Amounts payable (Note 14)	(179 871)	-	-	(179 871)
Amounts receivable (Note 8)	337 658	-	-	337 658
Outstanding loan accounts				
Loan to group entity (Note 12)	50 000 000	-	-	50 000 000
Year ended 30 September 2024				
Related party transactions				
Services paid	20 425 120	-	-	20 425 120
Revenue from rendering of services	-	2 588 026	-	2 588 026
Donations	-	631 126	-	631 126
Interest received	(4 625 000)	-	-	(4 625 000)
Outstanding balances for related party transactions				
Amounts payable (Note 14)	(5 892 454)	-	-	(5 892 454)
Outstanding loan accounts				
Loan from group entity (Note 15)	-	-	(224 487)	(224 487)
Loan to group entity (Note 12)	66 415 093	-	-	66 415 093

WE are...













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