



**National Agricultural
Marketing Council**
Promoting market access for South African agriculture

**SHORT REPORT ON STATUTORY MEASURES
IMPLEMENTED IN TERMS OF THE
MARKETING OF AGRICULTURAL PRODUCTS ACT,
ACT NO. 47 OF 1996**

2015

A SHORT REPORT BY THE

NATIONAL AGRICULTURAL MARKETING COUNCIL

TO THE MINISTER OF AGRICULTURE, FORESTRY AND FISHERIES

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ABBREVIATIONS

AgriBEE	Agricultural Broad-Based Black Economic Empowerment
CGA	Citrus Growers' Association
DFTS	Dried Fruit Technical Services
MAP Act	Marketing of Agricultural Products Act, No. 47 of 1996
NAMC	National Agricultural Marketing Council
PIDT	Potato Industry Development Trust
SAMAC	Southern African Macadamia Growers' Association
SAMPRO	South African Milk Processors' Organisation
SAPPA	South African Pecan Producers' Association
SAPPO	South African Pork Producers' Organisation
SATI	South African Table Grape Industry
SAWIS	South African Wine Industry Information and Systems
WCT	Winter Cereals Trust
Winetech	Wine Industry Network of Expertise and Technology
WOSA	Wines of South Africa

1. SUMMARY

The Marketing of Agricultural Products Act, No. 47 of 1996 (MAP Act), as amended, provides for the establishment of statutory measures. Since 1997, statutory measures – namely levies, records and returns, and registration – were approved by the Minister of Agriculture, Forestry and Fisheries (henceforth referred to as the Minister) and promulgated in the *Government Gazette*, on specific agricultural products, and for specific periods of time.

Registration, as well as records and returns, are measures used to collect and disseminate information in a particular industry. A statutory levy is a charge per unit of an agricultural commodity at any point in the marketing chain between the producer and the consumer, which is collected for specific functions such as research, information, or transformation.

Statutory measures, and specifically levies, play an important role in enabling growth in the relevant agricultural industries by means of effective information management and communication and the collection of funds to finance much-needed functions.

This report is the fourteenth report on the status of statutory measures, compiled by the National Agricultural Marketing Council (NAMC) for submission to the Minister. This report is shorter than the previous report, focusing only on the various levies collected in 2014 by the 18 agricultural industries concerned.

Levies are payable by specific, directly affected groups (usually producers and/or exporters and importers) in a specific industry. Therefore, the levy income is influenced by crop size and agricultural trade and, to some extent, the levy collection success rate.

The estimated volume of agricultural production levied during 2014 was 4.5 % higher than in 2013. Horticultural production increased slightly by 0.8 %, which can mainly be attributed to increases in the production of citrus and subtropical fruit. The production of animal products increased by 3.3 %, mainly due to an increase in the production of fresh milk, as well as an increase in the number of sheep, goats, pigs and cattle slaughtered during 2014. The estimated value of imports during 2014 increased by 6.5 %, while the estimated value of exports showed an increase of 12.1 %. According to the 2014 agricultural export figures, citrus, wine, grapes, apples and pears were the most important export products in terms of value.

In 2014, the statutory levies collected totalled R386.7 million – 5.5 % less than the previous year's reported R409.1 million. This marks the first time in 14 years that a decrease in levy income is reported, and can mainly be attributed to the fact that the poultry industry, which is the largest agricultural sector in South Africa, did not request the continuation of their statutory levy, which had lapsed in 2013. The poultry levy had generated an income of approximately R26 million per year.

Furthermore, approximately R431.4 million was spent on industry functions – an increase of 2.3 % compared to the previous survey. Of the total expenditure, approximately 36.4 % was spent on research, 20.1 % on transformation projects, 10.7 % on local consumer education, 13.9 % on export promotion, and 10.3 % on information (more details in Table 1 of this report).

The NAMC's findings on the current status of statutory measures promulgated in terms of the MAP Act, as verified by the latest audited financial statements for each levy administrator, are hereby presented to the Minister.

2. BACKGROUND

The NAMC thoroughly investigates every application by any directly affected group for a statutory levy so as to ensure that the proposed statutory measure is consistent with the objectives as set out in Section 2 of the MAP Act. These are:

- (a) To increase market access for all market participants;
- (b) To promote the efficiency of the marketing of agricultural products;
- (c) To optimise export earnings from agricultural products; and
- (d) To enhance the viability of the agricultural sector.

Furthermore, the degree of support from directly affected groups will be tested, along with whether the statutory levy will finance a public good – that is, a good or service that is to the benefit of all role players.

After finalising an investigation, the Minister will consider the NAMC's recommendations and, if the proposed statutory levy is approved, the following conditions of approval will be applicable:

- That 70 % of the levy income is spent on generic functions such as consumer assurance, consumer education, information, research, etc.;
- That not more than 10 % of levy income is spent on administration costs;
- That at least 20 % of levy income is spent on transformation (development of emerging farmers and other role players in line with the NAMC's guidelines on transformation);
- That the statutory levy income and expenditure are audited by the Auditor General, with the percentage allocated towards transformation clearly indicated;
- That surplus funds do not form part of the assets of the administrator and that they are utilised with the approval of the Minister upon the lapsing of the levy (for example, after four years);
- That the administrator maintains a database of black role players and their market share in order to monitor the progress of transformation in the relevant industry; and
- That the NAMC has observer status on the board of the administrator to ensure compliance with the original intent of the application.

Section 9 of the MAP Act directs that “the (NAMC) shall monitor the application of statutory measures and report thereon to the Minister, and shall evaluate and review such measures at least every two years”. Since 2001, the NAMC has conducted an annual review of all statutory measures.

Recent statutory measure reports to the Minister and Parliament have showcased many success stories, as well as the important contribution made towards agricultural development by the industries involved in statutory measures.

In 2014, the NAMC resolved to compile a shorter version of the Status of Statutory Measures Report every second year, and a longer version every other year. This report is the shorter version, focusing only on statutory levy income and expenditure. For each applicable agricultural industry, there is a detailed summary of the levies payable, the persons responsible for paying the levies, the administering body and the financial period, along with a financial summary. The trends in financing the generic functions funded by levies for the past 10 years, and the industries' contributions to each function in 2014, are also provided.

3. STATUTORY MEASURES APPLICABLE

The statutory levies promulgated in each applicable agricultural industry, and the financial summary of the recent financial year, are summarised in this section.

3.1. Citrus

Summary:

Levies payable by the producers of all export citrus fruit are as follows:

2013	3.13 c per kg (47 cents per 15 kg carton)
2014	3.33 c per kg (50 cents per 15 kg carton)
2015	3.53 c per kg (53 cents per 15 kg carton)
2016	3.73 c per kg (56 cents per 15 kg carton)

Administrating body:

Levies are administered by the Citrus Growers' Association of South Africa (CGA).

Period under review:

The period under review is 1 April 2013 to 31 March 2014, being the first year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 49 925 374**.

Total expenditure amounted to **R 49 265 553**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Research and Technical	29 016 094	58.1
Market Access	5 877 770	11.7
Representation	588 736	1.2
Administration	1 644 695	3.3
Information	1 213 715	2.4
Transformation	9 221 571	18.5
Communication	533 381	1.2
Supply Chain	854 617	1.7
Market Development	314 974	0.6
Total	49 265 553	98.7

3.2. Cotton

Summary:

The statutory levy on cotton lint (as extended on 1 April 2012 for two years at a rate of 20 c/kg, with a 1 c/kg increase as from 1 April 2013) lapsed on 31 March 2014. This report reviews the levy of 21 c per kg of cotton lint produced, as payable by ginners (who claim it from producers) to Cotton SA. The following new levy rates were approved by the Minister and promulgated in the Government Gazette of 28 March 2014:

- A cotton levy at a rate of 22 c/kg (VAT excluded), with annual increases as from 1 April 2015, equal to inflation rate expectations;
- From 1 April 2015 to 23.5 c/kg on cotton lint;
- From 1 April 2016 to 25.0 c/kg on cotton lint; and
- From 1 April 2017 to 26.5 c/kg on cotton lint.

Administrating body:

Levies are administered by Cotton SA.

Period under review:

The period under review is 1 April 2013 to 31 March 2014, being the last year of the two-year levy period.

Financial summary:

Levy income for the period amounted to **R1 117 001** (levy income formed a small part of Cotton SA's total income of R5.6 million, of which rental income from the leasing of office space in the Cotton SA building amounted to R 2 408 061).

Total expenditure amounted to **R6 928 933**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of (total) income: %
Administration	83 582	1.2
Information	4 140 262	59.7
Quality Control and Training	1 423 462	20.5
Research and Technology Transfer	263 000	3.8
Transformation	584 666	8.5
Promotion	433 961	6.3
Total	6 928 933	100

3.3. Dairy

Summary:

On 20 December 2013, new statutory levies for the next four years, until 31 December 2017, were promulgated. Levies are payable to Milk SA as follows:

- 1.3 c per kg on milk and cream, not concentrated nor containing added sugar or other sweetening matter;
- 12.5 c per kg on milk and cream, concentrated or containing added sugar or other sweetening matter;
- 4.7 c per kg on buttermilk, curded milk and cream, yoghurt, kephir and other fermented or acidified milk and cream, whether or not concentrated or containing added sugar or other sweetening matter or flavoured or containing added fruits, nuts or cocoa;
- 3.8 c per kg on whey, whether or not concentrated or containing added sugar or other sweetening matter; products consisting of natural milk constituents, whether or not containing added sugar or other sweetening matter not elsewhere specified or included;
- 13.4 c per kg on butter and other fats and oils derived from milk; dairy spreads;
- 18.7 c per kg on cheese and curd.

Levies are payable by producers, by the sellers of raw milk to retailers, and by importers, as well as by the buyers of raw milk for processing and manufacturing into other products or for exporting.

Administrating body:

Levies are administered by Milk SA.

Period under review:

The period under review is 1 January 2014 to 31 December 2014, being the first year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 40 918 518**.

Total expenditure amounted to **R34 851 392**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Information	2 018 201	4.9
Transformation	6 453 196	15.8
Transformation (utilisation of surplus funds)	4 854 989	11.9
Research and Development	944 487	2.3
Promotion	5 797 716	14.2
Consumer Education	14 797 414	36.2
Total	34 866 003	85.2

3.4. Deciduous fruit

Summary:

The following statutory levies are applicable to the deciduous fruit industry:

Product	2011/12 c/kg	2012/13 c/kg	2013/14 c/kg	2014/15 c/kg
• Pears (all classes) on export and domestic volumes on municipal markets and retail level	3.2	3.4	3.6	3.75
• Apples (all classes) on export and domestic volumes on municipal markets and retail level	3.2	3.4	3.6	3.75
• Peaches and nectarines (all classes) on export and domestic volumes on municipal markets and retail level	8.0	8.5	9.0	9.5
• Apricots (all classes) on export and domestic volumes on municipal markets and retail level	12.0	13.0	14.0	15.0
• Plums (all classes) on export and domestic volumes on municipal markets and retail level	10.25	11.0	11.75	12.5
• Apples destined for the manufacturing of apple juice concentrate by concentrate-processing plants	R6.25/ton	R6.5/ton	R6.75/ton	R7.0/ton

Levies are payable by exporters of the fruit on behalf of the producers thereof; by municipal markets on behalf of the producers from which such fruit was procured, in respect of all fruit sold on such markets; by retailers on behalf of the producers from which such fruit was procured; and by importers on fruit for sale on the domestic market.

The following levies are applicable in respect of market development and the consumer education campaign, as promulgated in March 2013 and administered by HORTGRO, to lapse in March 2017:

Export market development: The levy per export carton is applicable only to the specified fruit kinds (all sizes and all classes) exported, and is used specifically to fund the market development / consumer education programmes planned in Europe, the Middle East and the Far East:

Stone fruit:

50 c/kg per standard carton or the equivalent rate per kg on all other sizes of export cartons:

- Standard carton for apricots is 5 kg;
- Standard carton for peaches and nectarines is 2.5 kg
- Standard carton for prunes is 5.25 kg
- Standard carton for apples is 12.5 kg

Stone fruit:

35 c/kg per standard carton or the equivalent rate per kg on all other sizes of export cartons.

Local consumer education levy: The purpose of this campaign is to increase the demand for, and consumption of, South African stone fruit.

10 c/kg per standard carton or the equivalent rate per kg on all other sizes of cartons delivered to the local market:

- Standard carton for peaches and nectarines is 2.5 kg
- Standard carton for prunes is 5.25 kg

The following levies are applicable to planted hectares, for the funding of an integrated area-wide fruit fly control programme in specific production areas (payable by a producer, or a nominee on behalf of a producer, to DFPT Finance):

In the production region generally known as Langkloof:

- R175/ha for the 12-month period from July 2012 to June 2013;
- Not more than R186/ha for the 12-month period from July 2013 to June 2014;
- Not more than R880/ha for the 12-month period from July 2014 to June 2015;
- Not more than R940/ha for the 12-month period from July 2015 to June 2016.

In the production region generally known as Blouputs:

- R625/ha for the 12-month period from July 2012 to June 2013;
- Not more than R665/ha for the 12-month period from July 2013 to June 2014;
- Not more than R715/ha for the 12-month period from July 2014 to June 2015.
- Not more than R770/ha for the 12-month period from July 2015 to June 2016.

In the production regions generally known as the Elgin, Grabouw, Vyeboom and Villiersdorp area, the Hemel-&-Aarde area, the Warm Bokkeveld area, and the Wolseley and Tulbagh area:

- R775/ha for the 12-month period from July 2012 to June 2013;
- Not more than R825/ha for the 12-month period from July 2013 to June 2014;
- Not more than R875/ha for the 12-month period from July 2014 to June 2015;
- Not more than R935/ha for the 12-month period from July 2015 to June 2016.

In the production region generally known as the Hex River Valley:

- R1 075/ha for the 12-month period from July 2012 to June 2013;
- Not more than R1 150/ha for the 12-month period from July 2013 to June 2014;
- Not more than R1 225/ha for the 12-month period from July 2014 to June 2015;
- Not more than R1 300/ha for the 12-month period from July 2015 to June 2016.

Administrating body:

Levies are administered by HORTGRO and DFPT Finance.

Period under review:

The period under review is 1 October 2013 to 30 September 2014, being the third year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 38 847 769**.

Total expenditure amounted to **R42 267 812**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	2 181 885	5.6
Information and Liaison	5 359 833	13.8
Transformation	8 905 701	22.9
Research and Technical Services	20 498 393	49.8
Plant Improvement	3 715 256	9.5
Plant Certification	72 000	0.2
Market Access	1 534 744	3.9
Total	42 267 812	105.7

3.5. Dried fruit

Summary:

The dried fruit levies are as follows (VAT excl.):

	2012/2013 and 2013/2014	2014/2015 and 2015/2016
Dried Vine Fruit (Golden Raisins, Thompson Seedless Raisins, Muscat Raisins, Sultanas and Currants)	7 c per kg	8 c per kg
Dried Tree Fruits (Apricots, Apples, Peaches, Prunes, Nectarines, Pears and Others)	12 c per kg	14 c per kg

Levies are payable to Dried Fruit Technical Services (DFTS) by the producers of dried fruit, by packers on behalf of the producers of dried fruit, and by importers of dried fruit.

Administrating body:

Levies are administered by DFTS.

Period under review:

The period under review is 1 January 2014 to 31 December 2014, being the third year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 3 892 216**.

Total expenditure amounted to **R5 020 487**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	432 074	11.1
Information	365 201	8.9
Transformation	1 226 310	31.5
Research	1 936 629	49.7
Plant Improvement	1 060 273	27.7
Total	5 020 487	128.9

3.6. Fynbos (Proteas)

Summary:

The following levies are applicable to the fynbos industry, as from September 2011:

- R1.60 per standard export carton in 2011/12;
- R1.72 per standard export carton in 2012/13;
- R1.85 per standard export carton in 2013/14; and
- R2.00 per standard export carton in 2014/15.

Levies are payable to DFPT Finance by the producers of cultivated fynbos, and by packers and exporters on behalf of producers.

Administrating body:

Levies are administered by HORTGRO.

Period under review:

The period under review is 1 March 2013 to 28 February 2014, being the third year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **358 944**.

Total expenditure amounted to **R 358 944**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	35 893	10
Information and Liaison	88 148	25
Transformation	71 789	20
Research and Technical Services	13 182	4
Export Promotion	149 932	42
Total	358 944	100*

3.7. Lucerne

Summary

The statutory levies on locally produced lucerne seed and lucerne hay, as implemented for a period of three years, lapsed on 9 September 2014. These levies (VAT excluded) amounted to:

- 60 c/kg on clean seed;
- R3/t for lucerne hay not analysed by an NIR instrument; and
- R5/t for lucerne hay analysed by an NIR instrument.

On 30 October 2014 the Minister approved the implementation of the following lucerne levy increases, subsequently promulgated in the Government Gazette of 14 November 2014 and effective for a period of four years:

- 80 c/kg on clean seed, payable by lucerne seed cleaners;
- R4/t for lucerne hay not analysed by an NIR instrument, payable by the first lucerne hay dealer dealing with such lucerne hay; and
- R6/t for lucerne hay analysed by an NIR instrument, payable by the owner of the NIR instrument.

Administrating body:

Levies are administered by the National Lucerne Trust.

Period under review:

The period under review is 1 September 2013 to 31 August 2014, being the last year of the three-year levy period.

Financial summary:

Levy income for the period amounted to **R 958 143**.

Total expenditure amounted to **R958 143**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of total income: %
Administration	68 050	7.3
Cleaning, Grading and Classification		
Standards & Services	52 151	5.4
Information and Liaison	82 673	8.6
Transformation	269 945	28.2
Research and Technical Services	485 324	50.5
Total	958 143	100

3.8. Macadamias

Summary:

On 14 November 2014, the following levy on in-shell macadamia nuts (domestic and imported) was implemented for a four-year period:

- 23 c/kg on nut in shell at 1.5 % kernel moisture content (VAT excluded).

Levies are payable by the processors or consolidators of nuts in shell on behalf of growers, and by all importers.

Administrating body:

Levies are administered by the Southern African Macadamia Growers' Association (SAMAC).

Period under review:

The first year of levy administration will be reported on in the next NAMC review.

3.9. Mangoes

Summary:

A levy of 3 c per kg (R30 per ton) on fresh mangoes intended for processing (including atchar, juice, dried mangoes and mangoes for fruit salads), payable by processors on behalf of growers or producers of mangoes, was applicable for four years, lapsing on 31 December 2014.

Administrating body:

Levies are administered by the South African Mango Growers' Association (SAMGA).

Period under review:

The period under review is 1 October 2013 to 30 September 2014, being the last year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 1 166 934**.

Total expenditure amounted to **R 1 166 934**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	46 677	4
Extension	401 782	34
Transformation	100 000	9
Market Development	280 064	24
Research	338 411	29
Total	1 166 934	100

3.10. Olives

Summary:

The following levies were promulgated on 1 June 2012 for a period of four years:

- 40 c/l on olive oil
- 8 c/kg on table olives

Levies are payable by the producers of table olives and olive oil, and/or by processors and/or importers, to DFPT Finance.

Administrating body:

Levies are administered by HORTGRO.

Period under review:

The period under review is 1 November 2013 to 31 October 2014, being the second year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R1 083 737**.

Total expenditure amounted to **R1 083 737**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	92 382	8.5
Information and Liaison	217 250	20
Transformation	235 611	21.7
Research and Technical Services	246 550	22.7
Consumer Education/Promotion	291 944	26.9
Total	1 083 737	100*

3.11. Pecan nuts

Summary:

On 9 March 2012, the following levies were promulgated for a period of four years:

- 15 c/kg on all pecans and pecan products.

Levies are payable by producers, processors, packers and importers, to the South African Pecan Producers' Association (SAPPA).

Administrating body:

Levies are administered by SAPPA.

Period under review:

The period under review is 1 July 2014 to 28 February 2015, being the third year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 1 425 000**.

Total expenditure amounted to **R1 540 133**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	111 008	7.8
Research	743 314	52.2
Information	333 762	23.4
Transformation	207 513	14.5
Other	144 536	10.1
Total	1 540 133	108

3.12. Pork

Summary:

The statutory levy of R7.00 per head of pigs slaughtered at abattoirs and pigs exported live (excluding VAT) was replaced with the following levies, as promulgated on 17 April 2014:

1 November 2013 to 31 October 2014	R8.50 per pig
1 November 2014 to 31 October 2015	R8.93 per pig
1 November 2015 to 31 October 2016	R9.38 per pig

Levies are payable by the owners at slaughtering of the pigs, and by the exporters of live pigs.

Administrating body:

Levies are administered by Red Meat Levy Administrators (RMLA).

Period under review:

The period under review is 1 January 2014 to 31 December 2014, being the first year of the three-year levy period.

Financial summary:

Levy income for the period amounted to **R 20 859 030**.

Total expenditure amounted to **R17 282 165**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	1 142 197	5.5
Information and Liaison	956 487	4.6
Transformation	3 960 325	19.0
Research	1 370 154	6.6
Consumer Assurance	2 050 479	9.8
Consumer Education	7 802 523	37.4
Total	17 282 165	82.9

3.13. Potatoes

Summary:

The following levies are applicable to all classes of locally produced potatoes, intended for the domestic market or export market, as well as all classes of imported potatoes, as promulgated on 4 August 2011, for a period of four years:

	2011/12	2012/13	2013/14	2014/15
	c / kg	c / kg	c / kg	c / kg
Table Potatoes	1.600	1.675	1.750	1.825
Certified Seed Potatoes	0.635	0.665	0.695	0.725
Potatoes for processing	0.750	0.785	0.821	0.856
Potatoes for exports	1.600	1.675	1.750	1.825
Imported Potatoes	1.130	1.183	1.235	1.288

The following new levy rates were promulgated on 12 June 2015:

	2015/16	2016/17	2017/18	2018/19
	c / kg	c / kg	c / kg	c / kg
Table Potatoes	1.900	1.975	2.050	2.125
Certified Seed Potatoes	.755	0.785	0.814	0.844
Potatoes for processing	.891	0.926	0.962	0.997
Potatoes for exports	1.900	1.975	2.050	2.125
Imported Potatoes	1.341	1.394	1.447	1.500

Levies are payable by producers, or by traders, exporters, agents, packers or processors, or by any persons on behalf of producers, and by importers.

Administrating body:

Levies are administered by Potatoes South Africa.

Period under review:

The period under review is 1 July 2013 to 30 June 2014, being the third year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 36 292 710**.

Total expenditure amounted to **R35 643 499**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	2 770 732	7.6
Information and Liaison	6 865 069	18.9
Transformation	7 101 130	19.6
Research and Technical Services	9 396 714	25.9
Market Development	9 509 854	26.2
Total	35 643 499	98.2

3.14. Red meat

Summary:

On 11 November 2010, the following levies were promulgated for a period of four years, with the levy rates to increase in the third year to the amounts indicated in brackets:

Cattle:

- **R3.87 (R4.26) per head** – deducted and retained from the selling price of each designated animal by the buyer of such animal
- **R6.45 (R7.10) per head** – payable by the owner at slaughter, to the abattoir
- **R400 (R450) per year** – payable by each meat trader in respect of each outlet
- **R720 (R792) per container or assignment of red meat and/or products to be imported** – payable by the importer prior to the issuing of an import permit
- **R6.45 (R7.10) per head** of cattle exported live
- **0.07 % of commission** on the sale of designated animals, collected by the agent in respect of the sale of designated animals
- **R0.0124 (R0.0137) per kg of hides** produced locally – payable by the processors of hides produced locally and unprocessed hides exported

Sheep and goats:

- **R0.83 (R0.91) per head** – deducted and retained from the selling price of each designated animal by the buyer of such animal
- **R1.25 (R1.38) per head** – payable by the owner at slaughter, to the abattoir
- **R400 (R450) per year** – payable by each meat trader in respect of each outlet
- **R720 (R792) per container or assignment of red meat and/or products to be imported** – payable by the importer prior to the issuing of an import permit
- **R1.25 (R1.38) per head** of sheep/goats exported live
- **0.07 % of commission** on the sale of designated animals, collected by that agent in respect of the sale of designated animals
- **R0.0124 (R0.0137) per kg of skins** – payable by the processors of skins produced locally and unprocessed skins exported

Processed meat:

- **R0.0124 (R0.0137) per kg** of red meat, red meat products and pork purchased by meat processors for processing or further processing.

The Minister approved the latest application from the Red Meat Industry Forum (RMIF) for the continuation of statutory measures (registration, records and returns, and levies) for a new period of four years, as from 5 November 2014, to lapse on 4 November 2018, as promulgated in the *Government Gazette* of 11 November 2014.

The new levy for cattle is R7.81 per head from 5 November 2014 to 4 November 2015, while for sheep/goats the new levy is R1.52 per head for the first year. The statutory levies will increase with 10% every year for the four year levy period.

Administrating body:

Levies are administered by the Red Meat Levy Administrator (RMLA).

Period under review:

The period under review is the financial year from 1 March 2013 to 28 February 2014, being the last 8 months of the 3rd levy year of the four year levy period.

Financial summary:

Levy income for the period amounted to **R 31 894 934**.

Total expenditure amounted to **R35 602 306**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	3 459 727	10.8
Information and Liaison	3 338 558	10.5
Transformation	8 765 341	27.5
Research	3 856 014	12.1
Consumer Education	6 992 390	21.9
Production Development	3 629 019	11.4
Consumer Assurance	5 561 257	17.4
Total	35 602 306	111.6

This breakdown of expenditure on functions funded by statutory levies reflected in the table above is based on claims paid out during the financial year 1 March 2013 to 28 February 2014. Variations may exist as financial year ends and reporting periods vary and service providers may have included funds from the previous levy period paid out in the period under review in their reporting.

3.15. Sorghum

Summary:

The levy on sorghum of **R16/ton**, excluding VAT, on all first buyers and producers of sorghum, was implemented on 1 March 2010 for a period of four years, lapsing on 28 February 2014.

The Minister approved a new levy on sorghum, as promulgated in the Government Gazette, for the period 1 March 2014 to 28 February 2018. This amount of **R10/ton** of sorghum (excluding VAT) is payable by the buyers, importers, exporters and processors of sorghum, to the Sorghum Trust.

Administrating body:

Levies are administered by the Sorghum Trust.

Period under review:

The period under review is 1 March 2013 to 28 February 2014, being the last year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 1 526 139**.

Total expenditure amounted to **R2 025 013**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	73 139	4.8
Information and Liaison	488 408	32
Transformation	167 031	10.9
Research	1 296 435	84.9
Total	2 025 013	132.7

3.16. Table grapes

Summary:

The levy of **8 c per kg** on all inspected volumes of table grapes for export (all classes) was promulgated on 16 November 2012, for a period of four years, to lapse on 31 October 2016, and is payable by all exporters of table grapes.

Administrating body:

Levies are administered by the South African Table Grape Industry (SATI).

Period under review:

The period under review is 1 November 2013 to 31 October 2014, being the second year of the four-year levy period.

Financial summary:

Levy income for the period amounted to **R 17 983 740**.

Total expenditure amounted to **R19 187 519**, summarised as follows:

Functions financed by levies:	Amount spent: R	Percentage of levy income: %
Administration	2 457 343	13.7
Information and Liaison	2 435 203	13.5
Transformation	4 714 291	26.2
Research and Technical Services	6 807 216	37.8
Market Access	2 773 466	15.5
Total	19 187 519	106.7

3.17. Wine and grapes

Summary:

The following statutory levies on wine and grapes were promulgated on 20 December 2013:

Research and Development Levy:

	1/1/2014 – 31/12/2014	1/1/2015 – 31/12/2015	1/1/2016 – 31/12/2016	1/1/2017 – 31/12/2017
Grapes	R17.01 per ton	R18.27 per ton	R19.67 per ton	R21.14 per ton
Grape juice concentrate at 17.4 degrees Balling	2.43 c per litre	2.61 c per litre	2.81 c per litre	3.02 c per litre
Drinking wine	2.43 c per litre	2.61 c per litre	2.81 c per litre	3.02 c per litre
Distilling wine and wine spirit at 10 % alcohol by volume	2.10 c per litre	2.25 c per litre	2.42 c per litre	2.60 c per litre

Payable by wine producers and wine traders to SAWIS, acting on behalf of WINETECH.

Wine Export Generic Promotion Levy:

	1/1/2014 – 31/12/2014	1/1/2015 – 31/12/2015	1/1/2016 – 31/12/2016	1/1/2017 – 31/12/2017
Export wine in bulk	8.52 c per litre	9.12 c per litre	9.77 c per litre	10.47 c per litre
Otherwise	11.47 c per litre	12.02 c per litre	12.60 c per litre	13.20 c per litre

Payable by exporters to SAWIS, acting on behalf of WOSA.

Information Levy:

	1/1/2014 – 31/12/2014	1/1/2015 – 31/12/2015	1/1/2016 – 31/12/2016	1/1/2017 – 31/12/2017
Grapes	R11.27 per ton	R11.90 per ton	R12.53 per ton	R13.23 per ton
Grape juice concentrate at 17.4 degrees Balling	1.61 c per litre	1.70 c per litre	1.79 c per litre	1.89 c per litre
Drinking wine	1.61 c per litre	1.70 c per litre	1.79 c per litre	1.89 c per litre

Payable by producers of drinking wine packaged in containers of five litres or less, and by wine traders, to SAWIS.

Transformation Levy:

	1 /1/2014 – 31/12/2014	1 /1/2015 – 31/12/2015	1 /1/2016 – 31/12/2016	1 /1/2017 – 31/12/2017
Grapes	R2.24 per ton	R2.38 per ton	R2.59 per ton	R2.80 per ton
Grape juice concentrate at 17.4 degrees Balling	0.32 c per litre	0.34 c per litre	0.37 c per litre	0.405 c per litre
Drinking wine	0.32 c per litre	0.34 c per litre	0.37 c per litre	0.40 c per litre

Payable by wine traders to SAWIS.

Administrating body:

Levies are administered by SAWIS.

Period under review:

The period under review is 1 January 2014 to 31 December 2014, being the first year of the four-year levy period.

Financial summary:

Total levy income for the period amounted to **R78 745 177**.

• Information	R13 403 265
• Research and Development	R24 182 455
• Export	R41 159 457
Total	R78 745 177

Total expenditure amounted to **R97 116 540**, summarised as follows:

Functions financed by information levies:	Amount spent: R	Percentage of levy income of R13 403 265: %
Administration	433 864	3.2
Information	12 399 706	92.6
Transformation	4 095 835	30.5
Total	16 929 405	126.30

Functions financed by research and development levies:	Amount spent: R	Percentage of levy income of R24 182 455: %
Administration	565 584	2.3
Research and Development	16 878 915	69.8
Transformation	6 221 578	25.8
Total	23 666 077	97.9

Functions financed by export levies:	Amount spent: R	Percentage of levy income of R41 159 457: %
Administration	329 843	0.8
Generic and Promotional Expenses	48 477 304	117.8
Transformation	7 713 911	18.7
Total	56 521 058	137.3

3.18. Winter cereal

Summary:

On 2 August 2010, the Minister approved the following levies on all winter cereal sold by the producer or the importer thereof, imported, processed or converted, or exported, and in respect of which a SAFEX silo receipt has been issued if the levy in respect of such has not been paid previously:

Term	Wheat	Barley	Oats
1/10/2010 to 30/9/2011	R14 /t	R13 /t	R10 /t
1/10/2011 to 30/9/2012	R15 /t	R14 /t	R11 /t
1/10/2012 to 30/9/2013	R16 /t	R15 /t	R12 /t
1/10/2013 to 30/9/2014	R17 /t	R16 /t	R13 /t

The following new levies on winter cereals were promulgated on 6 November 2014:

Term	Wheat	Barley	Oats
1/10/2014 to 30/9/2015	R17/t	R16/t	R13/t

Administrating body:

Levies are administered by the Winter Cereals Trust.

Period under review:

The period under review is 1 November 2013 to 31 October 2014, being the last year of the four-year levy period.

Financial summary:

Total levy income for the period amounted to **R59 743 603**.

Total expenditure amounted to **R81 160 438**, summarised as follows:

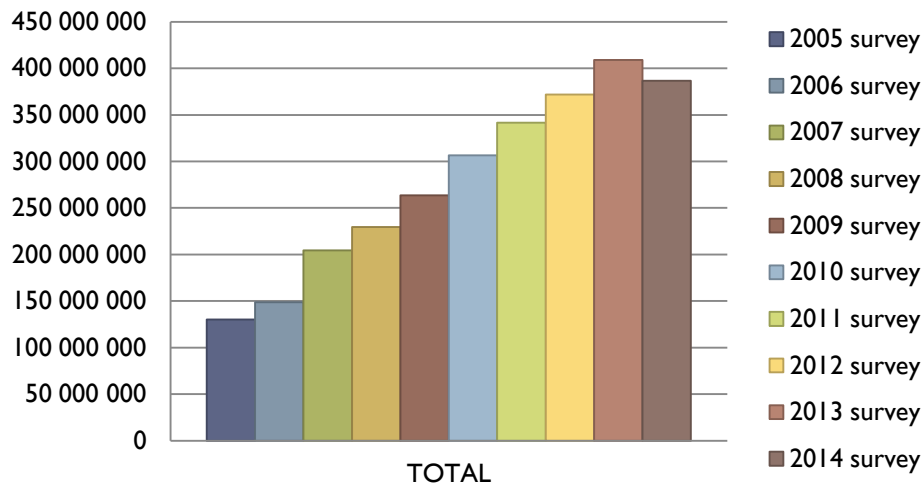
Functions financed by information levies:	Amount spent: R	Percentage of levy income %
Administration	3 202 952	5.36
Information	3 145 191	5.26
Research	62 990 256	105.4
Transformation	11 822 039	19.8
Total	81 160 438	135.8

4. TOTAL LEVY INCOME AND EXPENDITURE

4.1 Total levy income

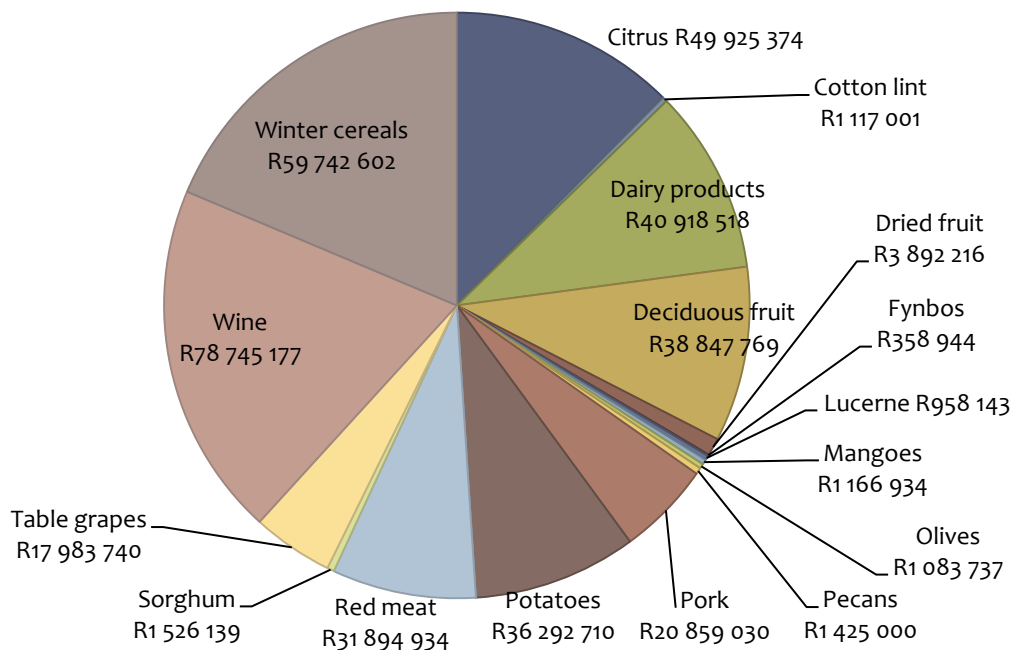
The total funds collected through statutory levies in 2014 amounted to R386.7 million, which is 5.5 % less than the previously reported R409.1 million. This decrease is mainly due to the fact that the poultry levy, which had generated an income of approximately R26 million per year, was discontinued as from 2013.

Graph 1: Total levy income for the past 10 years



The various industries' contribution to the total levy income is summarised in the following figure:

Figure 2: Total levy income in 2014



4.2 Total levy expenditure

This report shows that approximately R431.4 million was spent on industry functions – an increase of 2.3 % compared to the 2013 report. Of the total expenditure, approximately 36.4 % was spent on research, 20.1 % on transformation projects, 10.7 % on local consumer education, 13.9 % on export promotion/market access, and 10.3 % on information. Further details on the levy expenditure per industry and per function are provided in Table 1 below. Figure 3 and Figure 4 illustrate the levy expenditure for the past ten years, and the allocation to functions in 2014:

Graph 3: Total levy expenditure for the past 10 years

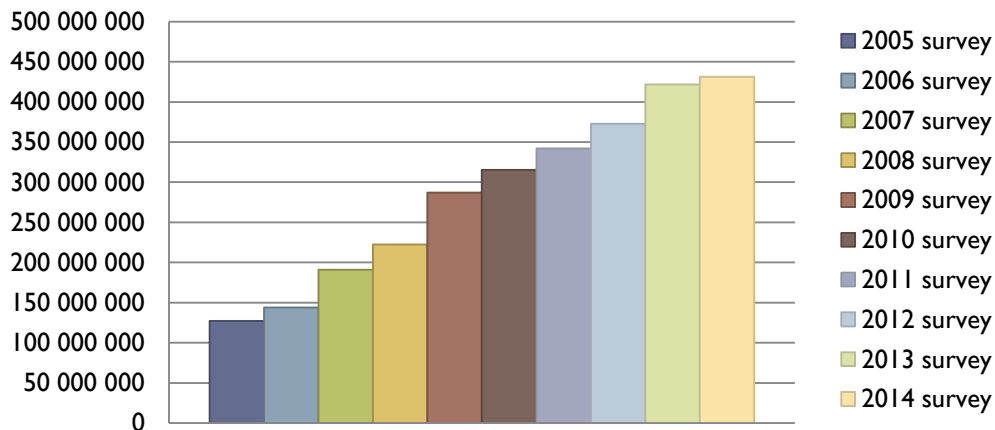


Figure 4: Total levy allocation to functions in 2014

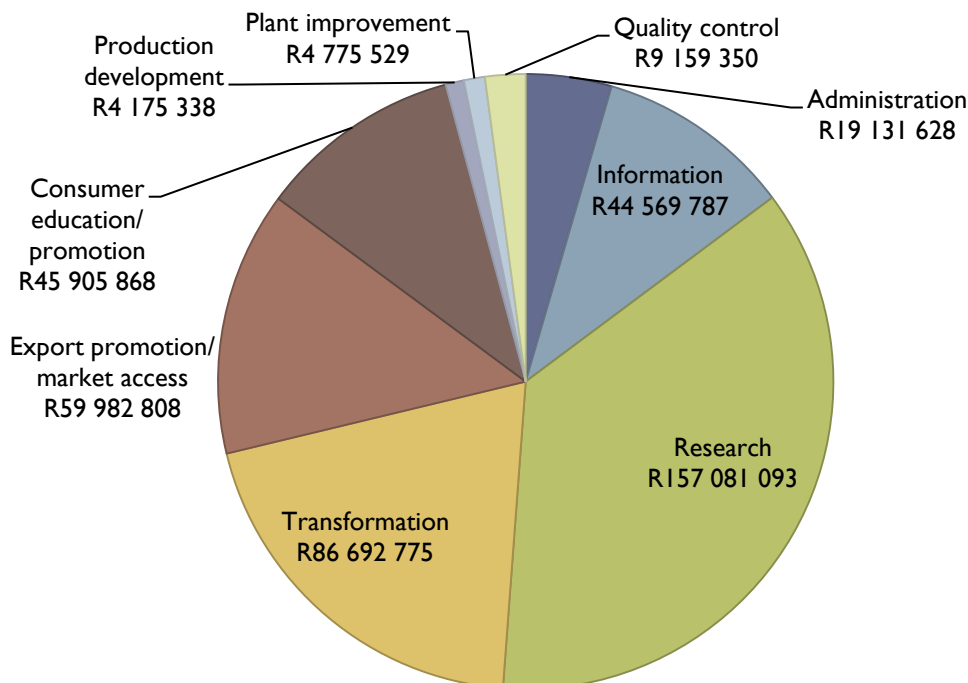


Table 1: Levy allocations to functions, per industry, and in total

	Administration	Information	Research	Transformation	Export promotion/ market access	Consumer education/ promotion	Production development	Plant improvement	Quality control	Total per industry and % of total
Citrus	1 644 695	2 335 832	29 016 094	9 221 571	7 047 361					49 265 553
<i>% of total expenditure</i>	3.3%	4.7%	58.9%	18.7%	14.3%					11.4%
Cotton	83 582	4 140 262	263 000	584 666		433 961			1 423 462	6 928 933
	1.2%	59.8%	3.8%	8.4%		6.3%			20.5%	1.6%
Dairy		2 018 201	944 487	11 308 185		20 595 130				34 866 003
		5.8%	2.7%	32.4%		59.1%				8.1%
Deciduous fruit	2 181 885	5 359 833	20 498 393	8 905 701	1 534 744			3 715 256	72 000	42 267 812
	5.2%	12.7%	48.5%	21.1%	3.6%			8.8%	0.2%	9.8%
Dried fruit	432 074	365 201	1 936 629	1 226 310				1 060 273		5 020 487
	8.6%	7.3%	38.6%	24.4%				21.1%		1.2%
Fynbos (proteas)	35 893	88 148	13 182	71 789	149 932					358 944
	10.0%	24.6%	3.7%	20.0%	41.8%					0.1%
Lucerne	68 050	82 673	485 324	269 945					52 151	958 143
	7.1%	8.6%	50.7%	28.2%					5.4%	0.2%
Mangoes	46 677		338 411	100 000		280 064	401 782			1 166 934
	4.0%		29.0%	8.6%		24.0%	34.4%			0.3%
Olives	92 382	217 250	246 550	235 611		291 944				1 083 737
	8.5%	20.0%	22.7%	21.7%		26.9%				0.3%
Pecans	111 008	333 762	743 314	207 513			144 536			1 540 133
	7.2%	21.7%	48.3%	13.5%			9.4%			0.4%
Pork	1 142 197	956 487	1 370 154	3 960 325		7 802 523			2 050 479	17 282 165
	6.6%	5.5%	7.9%	22.9%		45.1%			11.9%	4.0%
Potato	2 770 732	6 865 069	9 396 714	7 101 130		9 509 854				35 643 499
	7.8%	19.3%	26.4%	19.9%		26.7%				8.3%
Red meat	3 459 727	3 338 558	3 856 014	8 765 341		6 992 390	3 629 019		5 561 257	35 602 306
	9.7%	9.4%	10.8%	24.6%		19.6%	10.2%		15.6%	8.3%
Sorghum	73 139	488 408	1 296 435	167 031						2 025 013
	3.6%	24.1%	64.0%	8.2%						0.5%
Table grapes	2 457 343	2 435 203	6 807 216	4 714 291	2 773 466					19 187 519
	12.8%	12.7%	35.5%	24.6%	14.5%					4.4%
Wine and grapes	1 329 291	12 399 706	16 878 915	18 031 324	48 477 304					97 116 540
	1.4%	12.8%	17.4%	18.6%	49.9%					22.5%
Winter cereal	3 202 952	3 145 191	62 990 256	11 822 039						81 160 438
	3.9%	3.9%	77.6%	14.6%						18.8%
Total	19 131 628	44 569 787	157 081 093	86 692 775	59 982 808	45 905 868	4 175 338	4 775 529	9 159 350	431 474 160
<i>% spent on function</i>	4.4%	10.3%	36.4%	20.1%	13.9%	10.6%	1.0%	1.1%	2.1%	100.0%

5. TRENDS IN EXPENDITURE ON FUNCTIONS

The pages that follow contain an evaluation of the total spending on generic functions for the past ten years.

5.1 Administration

The NAMC's guidelines on the utilisation of levy funds stipulate that not more than 10 % of levies collected should be used for administrative purposes. The 2014 survey shows an average of approximately **4.5 % (R19.1 million)** of levies collected being spent on administration costs, which is below the guideline of 10 %. Audit fees are one of the major components of administration costs. The two figures below indicate the total expenditure on administration for the past 10 years, and the expenditure on administration per industry in 2014:

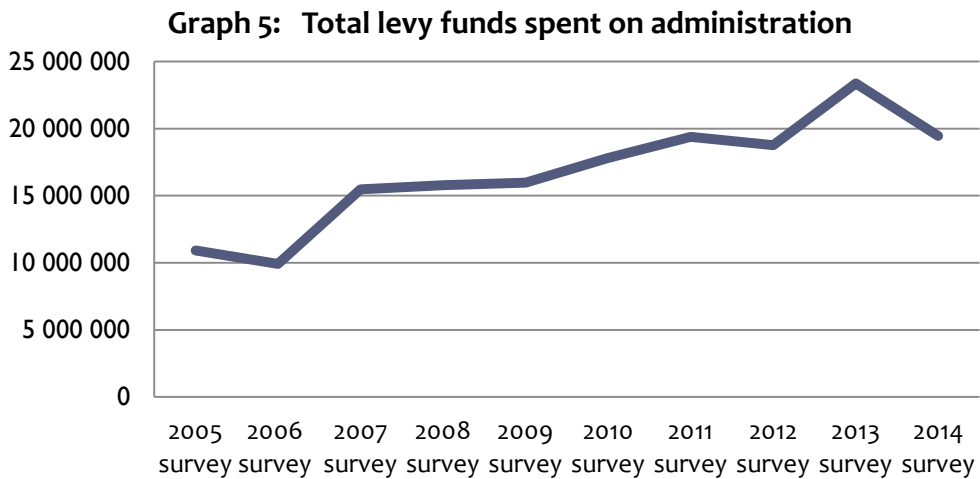
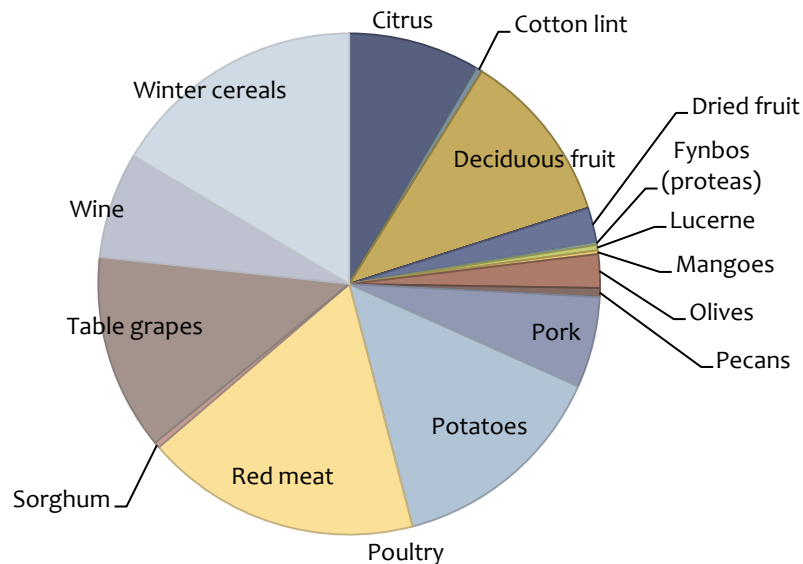


Figure 6: Industries' expenditure on administration in 2014



5.2 Information

For the past ten years, the levy expenditure on information more than doubled. For 2014, approximately **10.3 % (R44.6 million)** of total levy expenditure was allocated to the information function. The wine industry spent R12.4 million, the potato industry R6.9 million and the deciduous fruit industry R5.4 million on information and industry liaison, with the remaining proportions illustrated in Figure 8 below.

Graph 7: Levy funds spent on information

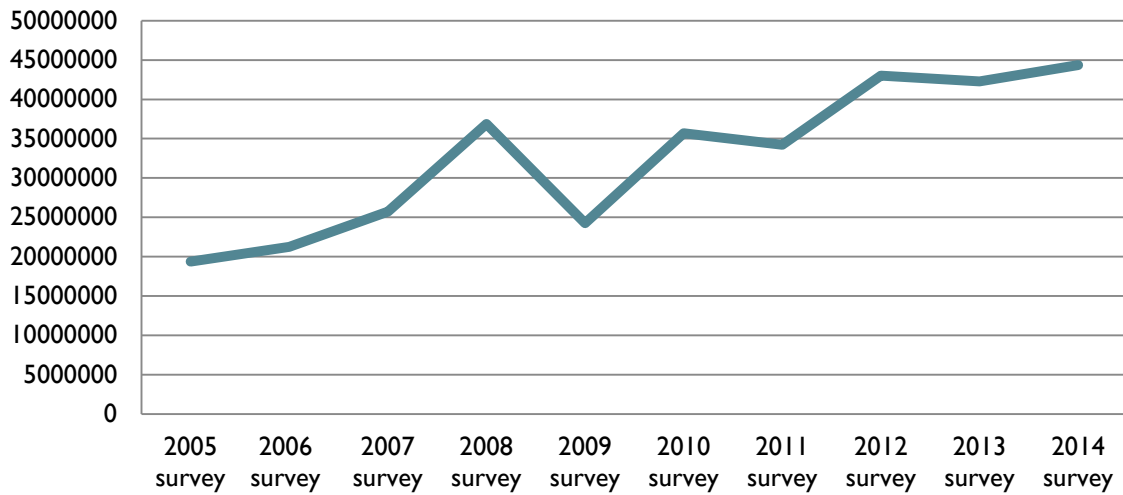
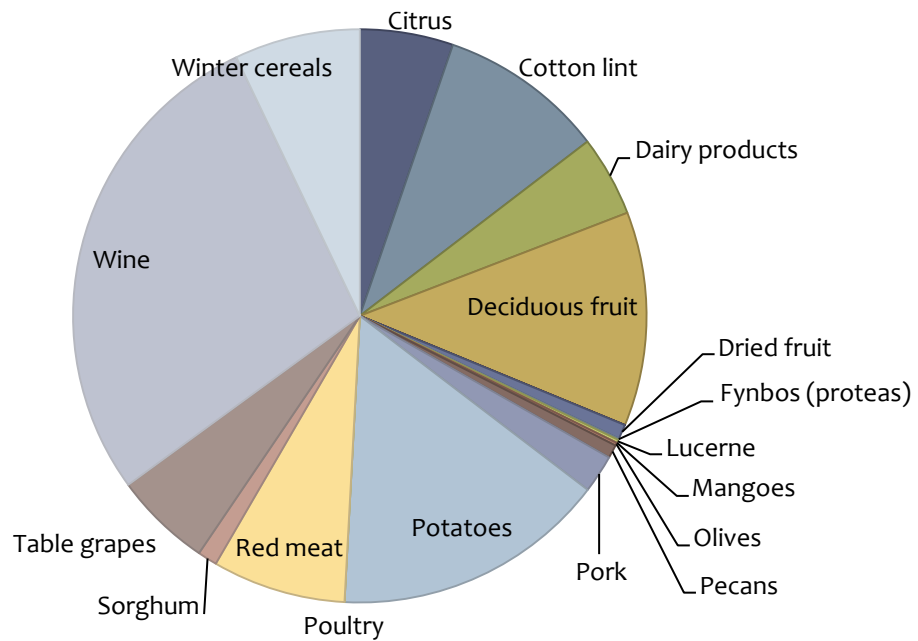


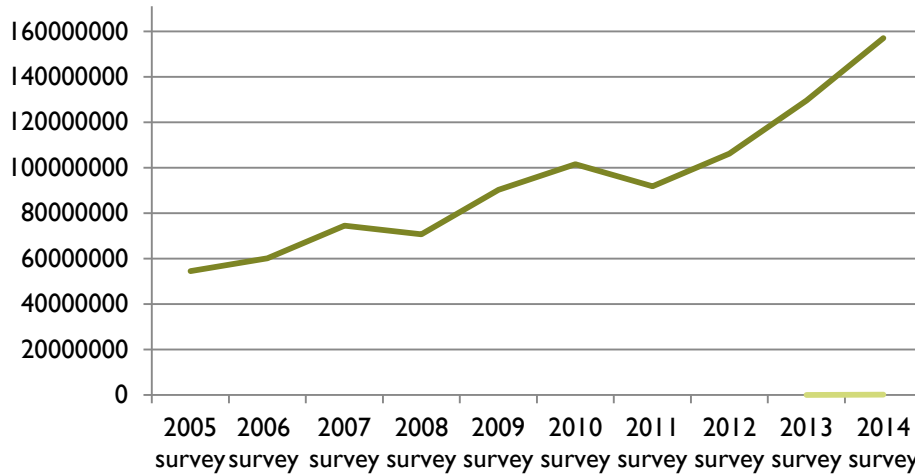
Figure 8: Industries' expenditure on information in 2014



5.3 Research

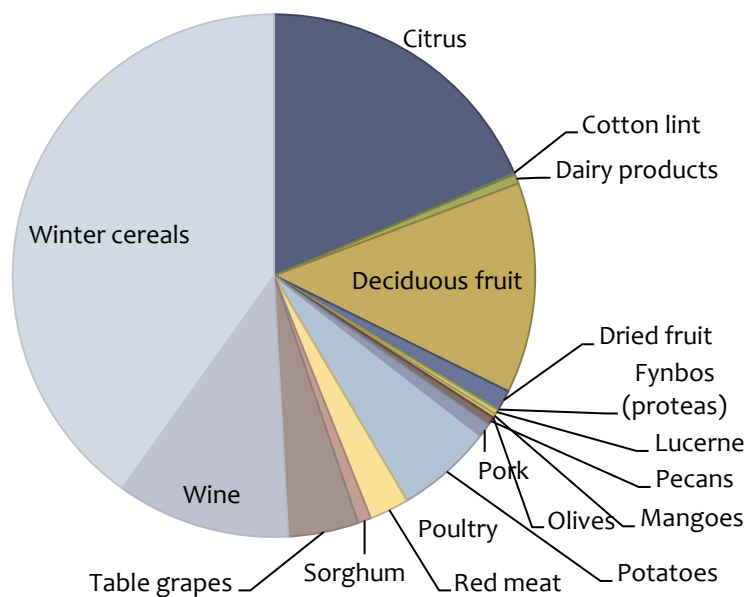
Research is the generic function that receives the largest proportion of total statutory levies. A steady increase in levies spent on research is evident over the past ten years, as indicated in Figure 9. The 2014 survey shows that approximately **36.4 % (or R157.1 million)** of total levy expenditure was allocated to the research function, which represents an increase of 21 % compared to the previously reported expenditure of R129.5 million. The satisfactory performance of the South African agricultural sector, despite the lack of high-potential arable land and the low rainfall, can to a great extent be attributed to the development and application of agricultural research results.

Figure 9: Levy funds spent on research



The transfer of levy funds for research projects by the relevant industries is shown in the figure below:

Figure 10: Industries' expenditure on research in 2014



5.4 Transformation

Total levy funds allocated for transformation projects over the past ten years are shown in Figure 11. This figure shows a strong upward trend until recently. In 1998 the first statutory levies were approved, with the provision that approximately 10 % of levy income be spent on transformation activities. In August 2005 this guideline was changed to approximately 20 %, and in 2010 it was changed again, with the provision that at least 20 % of levy income be used for transformation activities. In 2014 the NAMC adopted new transformation guidelines, in line with the AGRBEE scorecard, in an effort to increase the return on investment of funds being used for transformation. Although the 'at least 20 %' provision was not changed, the NAMC adopted specific generic transformation guidelines with the focus on enterprise development.

In terms of the new transformation guidelines, levy administrators should, on an annual basis and three months before the start of a financial year, submit a business plan in respect of transformation activities envisaged for the coming financial year. Six months after the close of a particular financial year, levy administrators should also report on actual transformation activities, by comparing their activities with the budget for that financial year. The NAMC Secretariat has appointed a Transformation Review Committee to manage this process. This Committee will henceforth report to the Minister on transformation activities, as part of the Status of Statutory Measures Report.

The NAMC further endorsed the view of the Department of Agriculture, Forestry and Fisheries that all its stakeholders should adhere to the Employment Equity Amendment Act, No 47 of 2013, which strives to achieve equity in the workplace by promoting equal opportunities and fair treatment in employment, and to ensure equitable representation in all occupational levels in the workforce. Therefore, administrators of statutory levies will be requested to submit an employment equity plan, setting out the steps they intend taking to achieve employment equity, with every statutory levy application to the NAMC and the Minister.

According to the 2014 survey, approximately **20.1% (R86.7 million)** was spent on transformation projects, compared to R97.9 reported in the previous survey, of which the poultry industry contributed R11.3 million (the poultry levies lapsed in 2013).

Figure 11: Levy funds spent on transformation

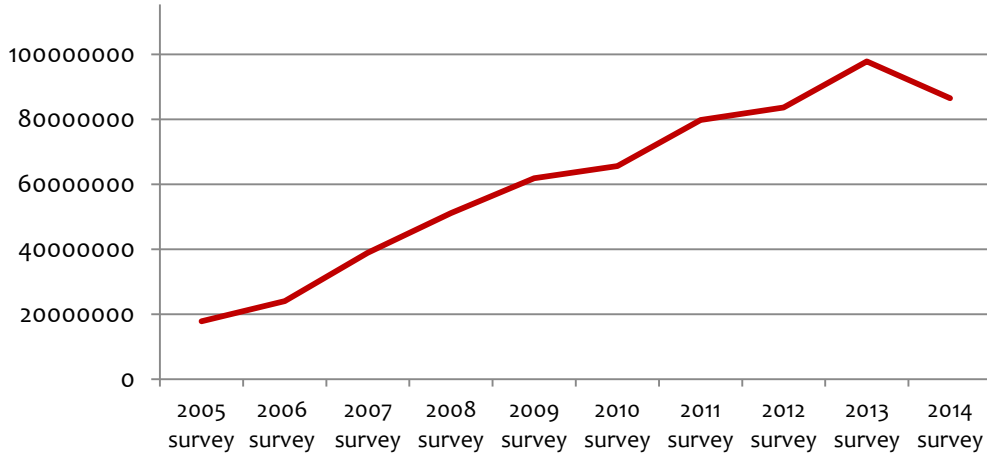
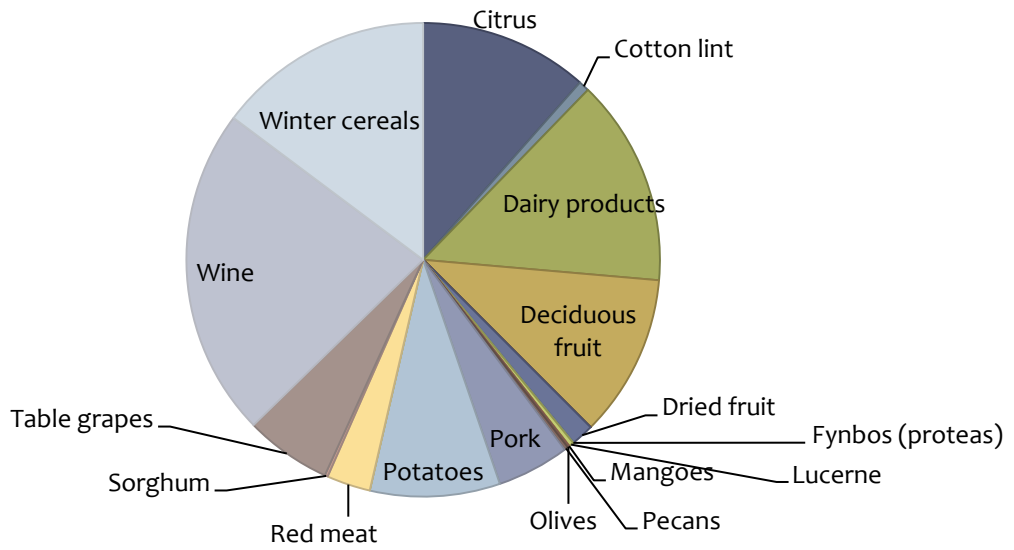


Figure 12: Industries' expenditure on transformation in 2014



5.5 Consumer education / local promotions

As per the 2014 survey, approximately **10.7 % (R45.9 million)** of total levy expenditure was spent on consumer education / promotions, compared to the R41.8 million (9.9% of total expenditure) reported in the previous survey.

The dairy industry allocates 59 % of levy funds towards this function, while the pork and red meat industries respectively allocate 45 % and 19 % of levy funds towards consumer education and local promotions to market their produce. The cotton, mango, potato and olive industries also allocate a percentage of statutory funds towards this function. The figure below shows the total expenditure on this function over the past 10 years, while the subsequent figure illustrates the industries' share in 2014:

Figure 13: Levy funds spent on consumer education/ local promotion

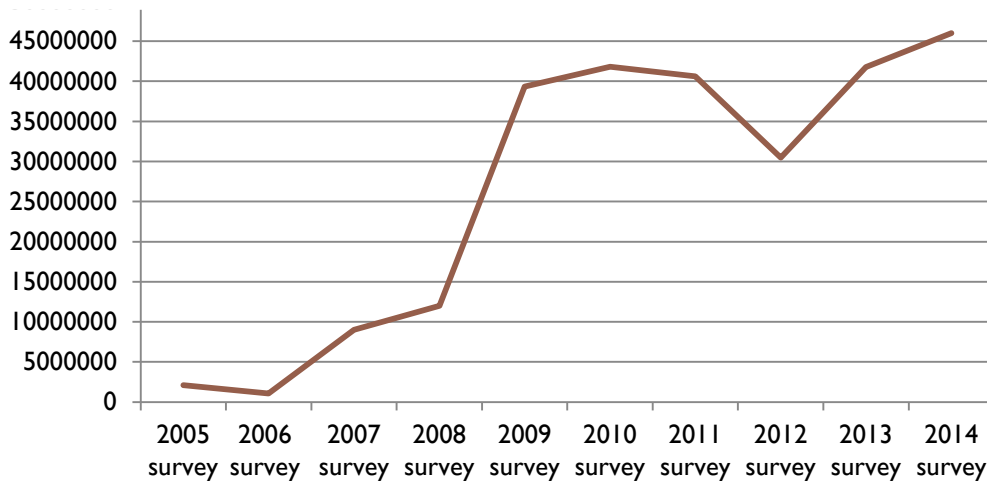
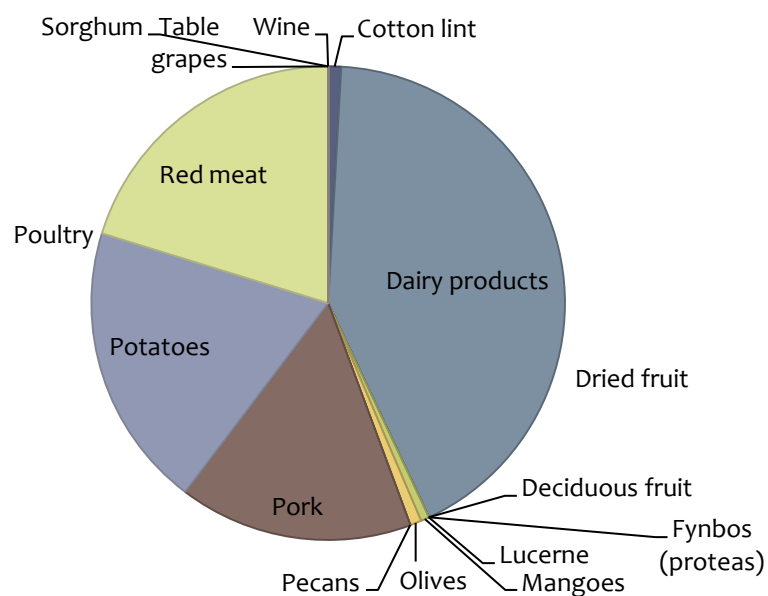


Figure 14: Industries' expenditure on consumer education/ local promotion in 2014



5.6 Export promotion and market access

The 2014 survey indicated that approximately **13.9 % (R60 million)** of total levy expenditure was allocated to export promotion and market access, compared to the approximately R61.3 million (14.5 %) reported in the 2013 survey. The horticultural industries, namely the citrus, deciduous fruit, table grape and wine industries, spent a major portion of their statutory funds on export promotion activities.

In recent years, role players involved in the horticultural industries have been convinced that expenditure on export promotion activities offers a satisfactory return on investment and also assists them in selling their produce at higher prices on overseas markets.

The figure below shows the total expenditure on this function over the past ten years, while the subsequent figure illustrates the industries' share in 2014:

Figure 15: Levy funds spent on export promotion and market access

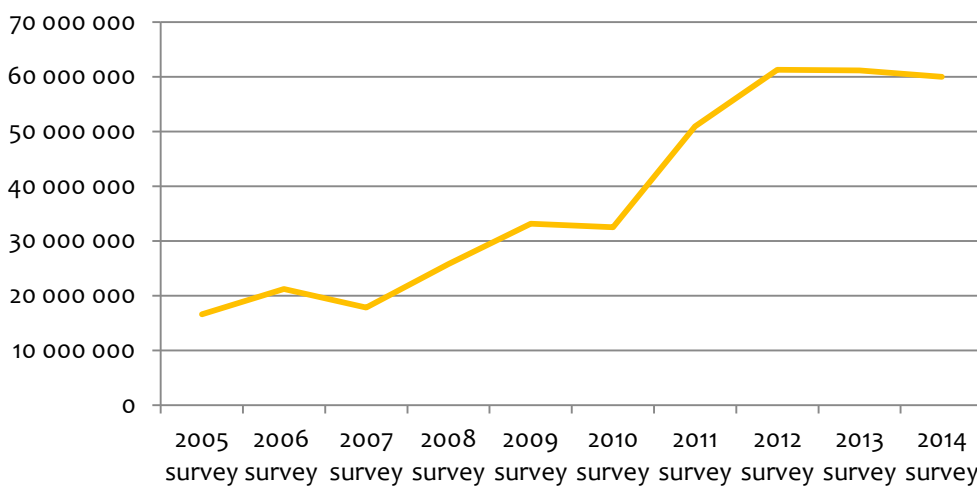
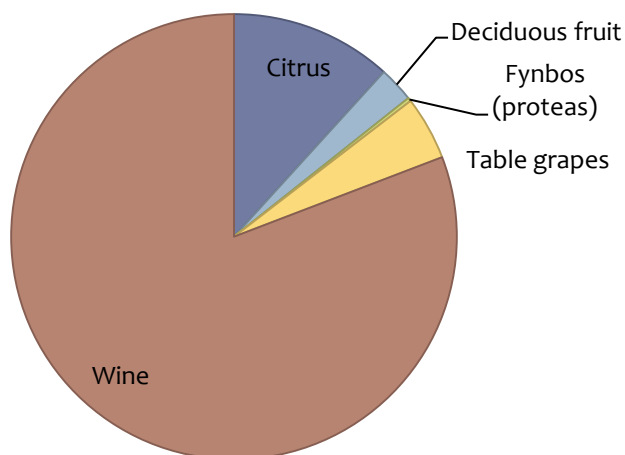


Figure 16: Industries' expenditure on export promotion and market access in 2014



5.7 Quality control

The function of quality control is mainly undertaken by the cotton, dairy, lucerne, pork and red meat industries, with the objective of ensuring that consumers have peace of mind when using these products. An amount of **R9.1 million (2.1 % of total levy expenditure)** was spent on quality control.

5.8 Plant improvement

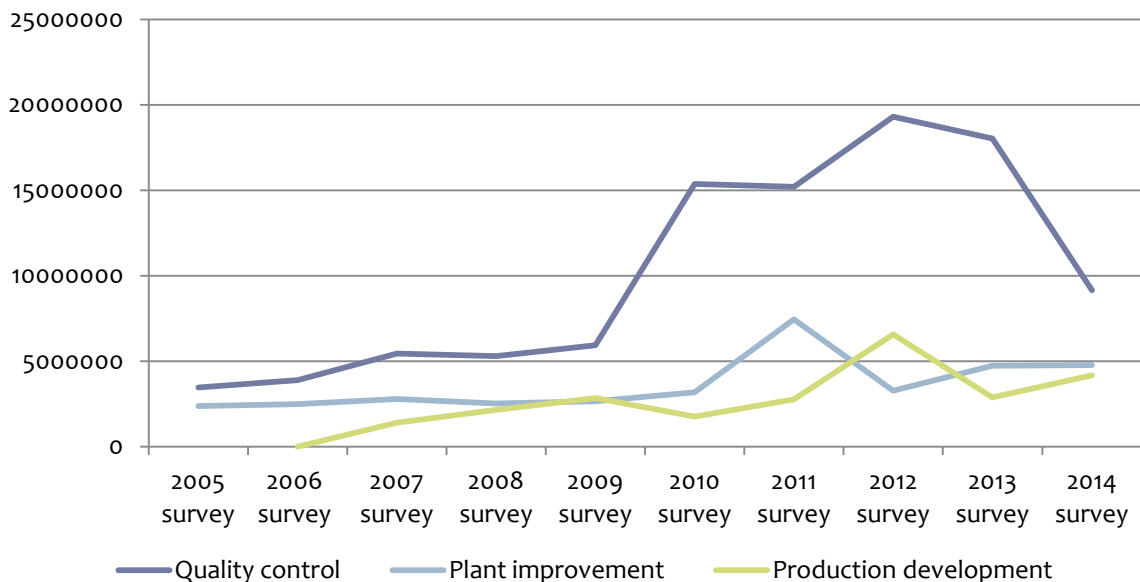
The deciduous fruit and dried fruit industries spent approximately **R4.7 million (1.1 % of total levy expenditure)** on plant improvement.

5.9 Production development

The mango, pecan nut and red meat industries spent **R4.2 million (1.0 % of total levy expenditure)** on production development.

Levy expenditure on the above-mentioned functions over the past 10 years is indicated in the figure below:

Figure 17: Levy funds spent on quality control, plant improvement and production development



6. CONCLUSIONS

This shorter version of the annual Statutory Measures Report to the Minister, focusing only on the various levies collected in 2014 by the 18 agricultural industries concerned, shows that an amount of R386.7 million was collected in 2014. This is 5.5% less than the previously reported R409.1 million. The poultry levy that lapsed since the previous report, which had generated an income of approximately R26 million per year, is the main reason for the major drop in levy collection.

Furthermore, approximately R431.4 million was spent on industry functions – an increase of 2.3 % compared to the 2013 survey. Of the total expenditure, approximately 36.4 % was spent on research, 20.1% on transformation projects, 10.7 % on local consumer education, 13.9 % on export promotion/market access, and 10.3 % on information.

Looking at the expenditure on generic functions over the past 10 years, it can be seen that information, research and consumer education/local promotion showed an increasing trend. The funding of administration, transformation, and export promotion and market access (to a very small degree) showed a declining trend.

It is cause for concern that some industries still find it difficult to spend at least 20 % of levy income on transformation. Some industries spent far more than 20 %, while certain small or new industries, such as the olive, pecan nut and fynbos industries, spent very little on transformation. It is, however, notable that while at least R80.4 million should have been spent (20 % of total levy income of R401.9 million), an actual amount of R86.5 million (or 21.5 % of levy income) was spent on transformation.

Furthermore, some industries find it difficult to comply with the conditions of approval, namely that levy funds should be audited separately from any other funds. Some levy administrators were also reluctant to supply the necessary information to the NAMC within the six-month timeframe, for purposes of compiling this report.

In conclusion, the NAMC wishes to thank those levy administrators who supplied the necessary information, as well as the Minister's office and the DAFF for their efficient assistance in the processing of applications for the implementation, amendment and continuation of statutory measures.

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