



**REPORT BY THE
NATIONAL AGRICULTURAL MARKETING COUNCIL
ON THE STATUS OF THE AGRICULTURAL INDUSTRY
TRUSTS**

2019 SURVEY

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DID YOU KNOW?

THERE ARE CURRENTLY 11 INDUSTRY TRUSTS, WHICH ARE ALL MANAGED TO PROTECT THE ASSET BASE, WHICH IS CURRENTLY SITTING AT OVER R2,3 BILLION. THERE ARE CURRENTLY 82 TRUSTEES WITH SEATS ON THE INDUSTRY TRUSTS, WITH 56 REPRESENTING THE INDUSTRY AND 26 (11 FEMALES AND 15 MALES) REPRESENTING THE MINISTER.

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EXECUTIVE SUMMARY

The trusts in South Africa, as natural persons, operate in terms of the prescripts of the Trust Property Act (Act No. 57 of 1988). However, the agricultural industry trusts operate within the mandates that are derived directly from the Marketing of Agricultural Products Act (Act No. 47 of 1996). The status report on agricultural industry trusts is an annual report by the National Agricultural Marketing Council (NAMC) in collaboration with the administrators of the industry trusts. This report aims to appraise the Minister of the Department of Agriculture, Land Reform and Rural Development (DALRRD) on the status of the trusts' assets. The report further outlines activities that are performed with the proceeds of the investments, rental incomes and transformation as financed by each trust. The industry trusts have a mandate to ensure that the assets are protected and adjusted annually to cater for inflation while using the proceeds generated from the investments and rental incomes to fund industry activities such as research and development, transformation, industry promotion, and training aligned to enterprise development.

There are currently 11 industry trusts, which are all managed to protect the asset base, which is currently sitting at over R2,3 billion. However, this is a decrease of R132,1 million from the 2017/18 asset base of R2,4 billion to R2,3 billion in the 2018/19 reporting period. The unfavourable market conditions have resulted in the interest earned being minimal. There are currently 82 trustees with seats on the industry trusts, with 56 representing the industry and 26 (11 females and 15 males) representing the Minister. Important to note is that only the National Lucerne Trust and the Mohair Trust have youth (less than or equal to 35 years) representation on the Board of Trustees. The minimum age is 35 years and the maximum age is 80 years. The industry trusts are key vehicles to drive transformation in the agricultural sector. The trusts are currently spending over R65,7 million on transformation, which represents an increase of 7,03 % from R61,4 million in 2017/18 and which funds key activities relating to enterprise development in line with the NAMC's transformation guidelines published in 2018. The NAMC prescribes that an industry should spend at least 20 % on transformation, while the industry trusts spend over 30 % of their transformation budget allocation on transformation in key activities such as enterprise development and skills development. The industry trusts would be able to do more if the government were to match rand for rand on the funding of transformation to have a satisfactory impact.

Furthermore, the tracking of transformation in the sector remains a major challenge, especially in terms of keeping records on the number of smallholder farmers and the volumes produced, as well as the distribution of volumes to the markets. The same cannot be said for the commercial sector, however. The details hereof are outlined in the status report sections, which are subdivided as follows:

- › Section one covers the activities of the NAMC with regard to the agricultural industry trusts;
- › Section two covers general information relating to governance;
- › Section three covers financial information;
- › Section four covers transformation information; and
- › Section five covers production and trade information.

The status report¹ on the agricultural industry trusts is hereby presented to the Minister of the DALRRD and the Portfolio Committee on Agriculture, Land Reform and Rural Development.

¹ This report was compiled by Mr Matsobane (BM) Mpyana, Mr Bonani Nyhodo, Mr Elekanyani Nekhavhambe and Ms Nomantande Yeki



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SECTION ONE: ACTIVITIES OF THE NATIONAL AGRICULTURAL MARKETING COUNCIL WITH REGARD TO THE AGRICULTURAL INDUSTRY TRUSTS



1.1 Background

Section 1 reports on the activities performed by the NAMC for the reporting period. This section covers work pertaining to the co-ordination between the Minister of the Department of Agriculture, Land Reform and Rural Development (DALRRD), formerly known as the Department of Agriculture, Forestry and Fisheries (DAFF), and the various agricultural industry trusts. The matters reported to the Minister, Mrs A.T. Didiza, include, but are not limited to:

- › The appointment of ministerial trustees (recommendation of names, with the Minister making the appointments),
- › The co-ordination of engagements between the Minister and the trusts (to get first-hand information on the progress and to directly engage the trusts), and
- › The submission of the status report (to appraise the Minister of the status) on the work of the agricultural industry trusts.

The details of each of these activities are presented in the subsections that follow.

1.2 Engagement between the NAMC and Agricultural Industry Trusts

On 11 March 2020, the NAMC hosted a meeting with the agricultural industry trusts at the OR Tambo Southern Sun Hotel in Johannesburg. The engagement went well, with a total attendance of 38 delegates from various stakeholders including the DALRRD, NAMC, Onderstepoort Biological Products (OBP), Agricultural Research Council (ARC) and industry trusts. All the industry trust administrators gave presentations on the performance of their investments, meaning growth or decline in assets, challenges and successes with regard to transformation, and administrative matters. The way forward emerging from this engagement included:

- › NAMC Council commitments through the Acting Chairperson to arrange with the Minister to provide feedback on the meeting with the trusts (challenges and solutions);
- › Proposal of a rand-for-rand approach between the department and industry trusts to speed up transformation in the agricultural sector; and
- › Emphasis on the fact that smallholder farmers must succeed.

The comprehensive report regarding the engagement is available at www.namc.co.za.

1.3 Appointment of Ministerial Trustees

The terms of the ministerial trustees in the Citrus Industry Trust lapsed in May 2019, and the replacements have not yet been approved. The term of Ms N. Dlula as a ministerial trustee in the Wool Trust lapsed on 4 October 2019 and she was replaced by Ms Joyce Letswalo. In the Winter Cereals Trust, the terms of Mr Neo Masithela, Mr Tato Make and Ms Mmaphefo Mabe lapsed at the end of March 2019 and they were replaced by Dr Moshibudi Paulina Bopape-Mabapa, Mr Luvuyo Mabombo and Ms Sharon Thembi Xaba. Following the appointment by the Minister, the NAMC conducted a comprehensive induction to the newly appointed ministerial trustees to gear them up for their respective duties. The induction covered the role of the NAMC with regard to the industry trusts and the unpacking of the governance of the trusts for the trustees to clearly understand their roles in the respective trusts in which the Minister is represented.



TRUST ADMINISTRATORS

LIVESTOCK



FIELD CROPS



HORTICULTURE



Deciduous
Fruit Industry
Development
Trust



For more information, contact:
Tel: (012) 341 1115 | Email: info@namc.co.za



SECTION TWO: GENERAL TRUST INFORMATION

2.1 Introduction

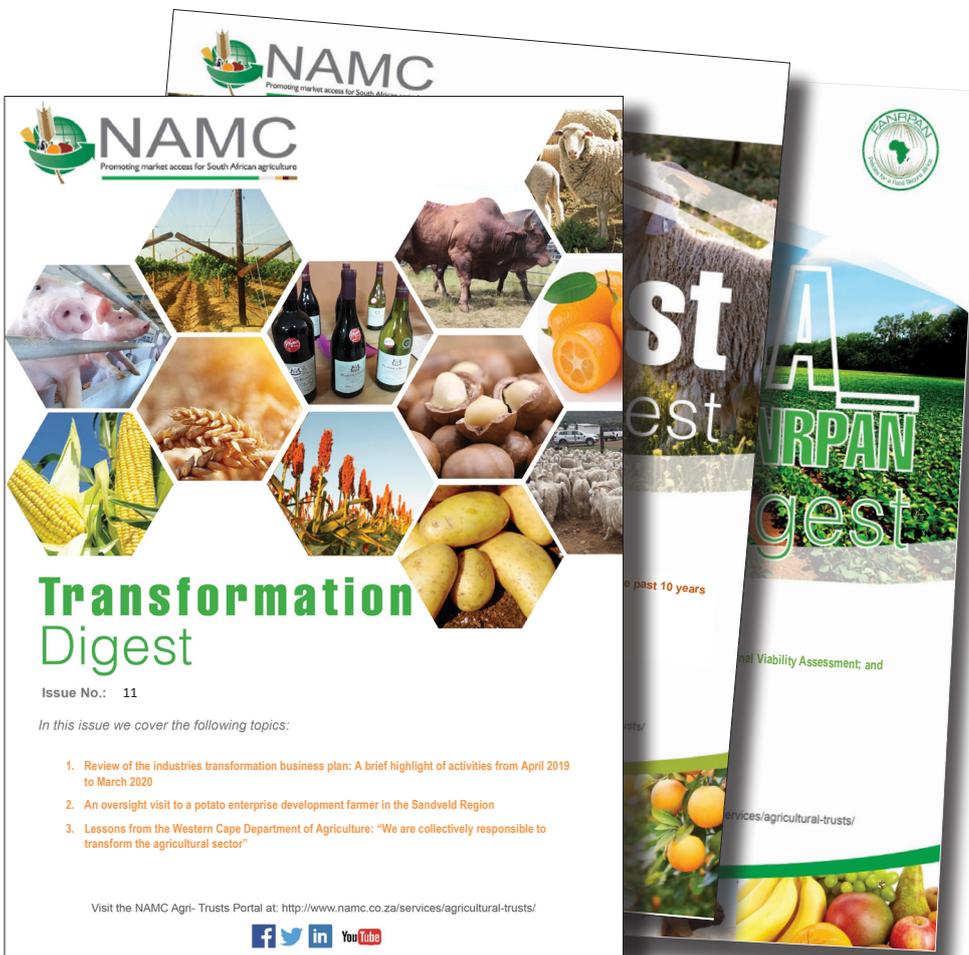
This section presents information on the governance of the trusts. There are currently 82 trustees, of whom 56 represent the industry and only 26 (11 females and 15 males) represent the Minister of Agriculture, Land Reform and Rural Development. The average age of the trustees in the Citrus Industry Trust is 52 years; in the Deciduous Industry Development Trust and Sorghum Trust it is 53 years; in the Maize Trust it is 55 years; in the Mohair Trust it is 54 years; in the National Lucerne Trust it is 45 years; in the Oil and Protein Seeds Development Trust it is 52 years; in the Potato Industry Development Trust it is 62 years; in the Winter Cereals Trust it is 59 years, and in the Wool Trust the average age is 66 years. Important to note is that only the National Lucerne Trust and the Mohair Trust have youth (less than or equal to 35 years) representation on the Board of Trustees. Table 1 below shows the representation within the board of each industry trust.

Table 1: Representation within the Board of Trustees of each industry trust

Trust Category	Trust Name	Age of the Trust (years)	Board of Trustees
Horticulture	Citrus Industry Trust	21	Mr M. Fry (until November 2019); Mr Z. Mavimbela; Mr J. Brand; Dr H. Ngwenya; Mr A. Sithole; Ms P. Sello-Motlogeloa
	Deciduous Fruit Industry Development Trust	21	Mr I. Motala; Ms M. Rangaka; Mr E. Jefthas; Mr J. Sauls; Mr T. Abrahams; Mr N. Dicey
	Potato Industry Development Trust	16	Mr E. Yzel; Dr F. du Plooy; Mr D. van Zyl; Mr W. Fourie; Mr S. Mabuza
Field crops	Maize Trust	22	Dr S. Ndlungwane; Dr. J. Purchase; Mr D. Mathews; Mr C. Schoonwinkel; Mr Z Ngejane; Ms M. Mabe
	Sorghum Trust	23	Mr H. Mohane; Mr W. Groothof; Mr J. de Wet Boshoff; Mr A. Nebe; Mr R. Pholo
	Oil and Protein Seeds Development Trust	23	Mr A. Moosa; Mr J. De Wet Boshoff; Ms J. van der Merwe; Mr R. Monaisa; Mr A. Botha (28/02/2019); Mr R. Küsel (from 01/03/2019); Mr D. Schutte; Mr K. Gaoraelwe; Mr U. Ntintelo
	Winter Cereals Trust	23	Mr N.H. Masithela (outgoing); Ms M.E. Mabe (outgoing); Mr B.B. Make (outgoing); Mr A.W. Bartlett; Ms M.M. Maphanga; Mr T.V. Mongoato; Ms J. van der Merwe; Mr G.R. Penny; Ms M. Purnell; Mr B. Mokgatle; Mr J.F. de Villiers; Mr A.P. Theron (outgoing); Mr R.P. Krige (incoming); Dr S.T. Xaba (incoming); Dr M.P. Bopape-Mabapa (incoming); Mr S.L. Mabombo (incoming)
	National Lucerne Trust	23	Mr D. Malan; Mr J. Potgieter; Mr C. Bhiya; Mr R. Roselt; Mr A. Schlebusch; Mr S. Brunette; Mr R. Strydom
Livestock	Meat Industry Trust		Adv. L. Kugel; Mr B. Swart; Mr. T. Davidson; Mrs B. Tlhabane; Dr T. Hewu; Mrs N. Motshegoa
	Mohair Trust	23	Mr D. Herold; Mr R. Kirsten; Mr J de Klerk; Mr S. Fani; Mr A. Greeff; Mr G. Hope; Mr C. Martins; Mr D. Nel; Mr I. Staats; Mr M. Shires; Mr G. Stegmann; Ms N. Hadi
	Wool Trust	23	Mr H.N. Bonner; Ms N.E Dlula; Mr A.R. Kidson; Dr A. Moore; Ms N.O. Sigidi; Mr J.P. Stucken; Mr H.A. van Schalkwyk

AGRICULTURAL INDUSTRY TRUSTS

The
Division
was established to
manage and coordinate
the communication process
between the Minister for
Agriculture, Land Reform
and Rural Development
and Agricultural
Industry Trusts



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SECTION THREE: FINANCIAL INFORMATION

3.1 Introduction

This section provides financial information regarding all the industry trusts for the reporting period of 2018/2019. Table 2 shows the asset values for the 2017/2018 and 2018/2019 financial years and the differences between the two. Noteworthy is that the total value of the agricultural industry trusts decreased from what it was in the previous cycle (2017/2018) by R132,1 million. However, looking at individual trusts, there are mixed performances. It is important to note that there is a section after Table 2 that explains the reasons behind the increases and decreases.

Table 2: Trusts' asset bases for the 2017/2018 and 2018/19 financial years

TRUST NAME	TOTAL ASSET VALUE (R)		CHANGE (R)
	2017/18	2018/19	
Citrus Industry Trust	15 870 413	15 447 855	-422 558
Deciduous Fruit Industry Development Trust	17 214 634	17 113 818	-100 816
Maize Trust	1 097 016 431	1 030 342 303	-66 674 128
Meat Industry Trust	46 327 678	48 048 852	1 721 174
Mohair Trust	285 366 736	274 274 112	-11 092 624
National Lucerne Trust	2 195 540	1 844 933	-350 607
Oil and Protein Seeds Development Trust	318 788 685	314 890 562	-3 898 123
Potato Industry Development Trust	19 168 215	22 782 515	3 614 300
Sorghum Trust	28 292 083	26 208 750	-2 083 333
Winter Cereals Trust	74 927 671	64 480 385	-10 447 286
Wool Trust	538 047 252	543 703 763	5 656 511
Total	2 443 215 338	2 311 088 996	-132 126 342

3.2 Reasons for Asset Growth/Decline

3.2.1 Horticultural Trusts

- › **Citrus Industry Trust:** The trust's asset base decreased from R15,8 million in the 2017/18 financial year to R15,4 million in the 2018/2019 financial year. The trust changed its Asset Manager in August 2018. The trust also reviewed its investment mandate and committed itself to a fixed-investment strategy through long-term investment. However, the decrease in the asset base value was due to the poor performance of the market and the appreciation of the rand/dollar exchange rate.

- › **Deciduous Fruit Industry Development Trust:** The trust's asset base decreased from R17,2 million to R17,1 million between the 2017/18 and 2018/19 financial years. The trust reviews its investment mandate at each trustee meeting, and the portfolio managers were not changed in the past year.
- › **Potato Industry Development Trust:** The trust's asset base increased from R19,1 million to R22,7 million between the 2017/2018 and 2018/19 financial years. This is a statutory trust responsible for the management of levies and hence the only two assets the trust has are cash and debtors. There is, therefore, a correlation between the turnover of the trust and its assets. The main reason for the increase in the assets of the trust is the increase in the turnover between the two years as a result of
 - i. an increase in the levy, and
 - ii. the higher volumes of potatoes produced.

The combined effect increased the total levy turnover received, which resulted in a higher debtor book.

3.2.2 Field Crop Trusts

- › **Maize Trust:** The trust's asset base declined from R1,09 billion to R1,03 billion between the 2017/2018 and 2018/19 financial years. The decrease was due to market volatility. Annually, the trust reviews its investment mandate and has changed its portfolio managers in the past year.
- › **Oil and Protein Seeds Development Trust:** The Trust's asset base decreased from R318,7 million to R314,8 million between the 2017/18 and 2018/19 financial years. This was due to market fluctuations and increased in transformation budget. The Trust reviews its investment mandate annually, and if necessary, the mandate can be reviewed at every meeting, depending on the markets. The portfolio managers were not changed in the past year.
- › **Sorghum Trust:** The trust's asset base decreased from R28,3 million to R26,2 million between the 2017/18 and 2018/19 financial years. The decrease was due to market volatility and funding policy that will deplete the trust's funds over time. The trust reviews its investment mandate annually, and only one portfolio manager did not change in the past year.
- › **Winter Cereals Trust:** The asset base of the trust decreased from R74,9 million to R64,4 million between the 2017/18 and 2018/19 financial years. The assets of the trust decreased due to a withdrawal that was made from the investments of the trust. The trust's investment mandate is reviewed by the Trust Investment Committee, which meets annually to evaluate and review the investments of the trust. The investment mandate of the trust is reviewed when a situation occurs that deems it necessary.

3.2.3 Livestock Trusts

- › **Meat Industry Trust:** The total asset base increased from R46 million to R48 million between the 2017/2018 and 2018/19 financial years due to the rising market value of investments.
- › **Mohair Trust:** The total asset base decreased from R285 million to R274,2 million between the 2017/2018 and 2018/2019 financial years due to the decrease in the Old Mutual portfolio. The investment mandate of the trust is reviewed at least annually. The portfolio managers were not changed in the past year.
- › **Wool Trust:** The total asset base increased from R538 million to R543,7 million between the 2017/18 and 2018/19 financial years. This represents a 1,1 % increase in the Wool Trust's total asset base.
- › **National Lucerne Trust:** The trust's total asset value decreased from R2,2 million to R1,8 million between the 2017/18 and 2018/19 financial years. The main reason for the decrease in asset value was due to the Glacier Sanlam: Personal Portfolio Investment Plan no longer being an asset of the trust.

SECTION FOUR: TRANSFORMATION INFORMATION

4.1 Introduction

This section looks at transformation and covers all aspects of transformation and what each trust is doing in detail. The main objective of this section is to present details of the various industries' approaches to transformation and outlines the numbers and costs of all the enterprises and persons receiving financial assistance from the trusts. The discussion is broken down into the three sub-categories of agriculture.

4.2 Summary of the Trusts' Transformation Expenditure for the period between 2012 and 2018

Figure 1 presents the trusts' transformation expenditure from the 2012/13 to 2018/19 surveys. The trusts continue to be the key vehicles in driving transformation in the sector. The trusts have spent about R65,7 million on transformation, which is an increase of 7,03 % from R61,4 million in 2017/18. The efforts of trusts towards transformation are visible and highly commendable. If funds like this could be merged with other funds from other funders such as government, commodity associations and other external funders, transformation within the respective sub-sectors would be enhanced.

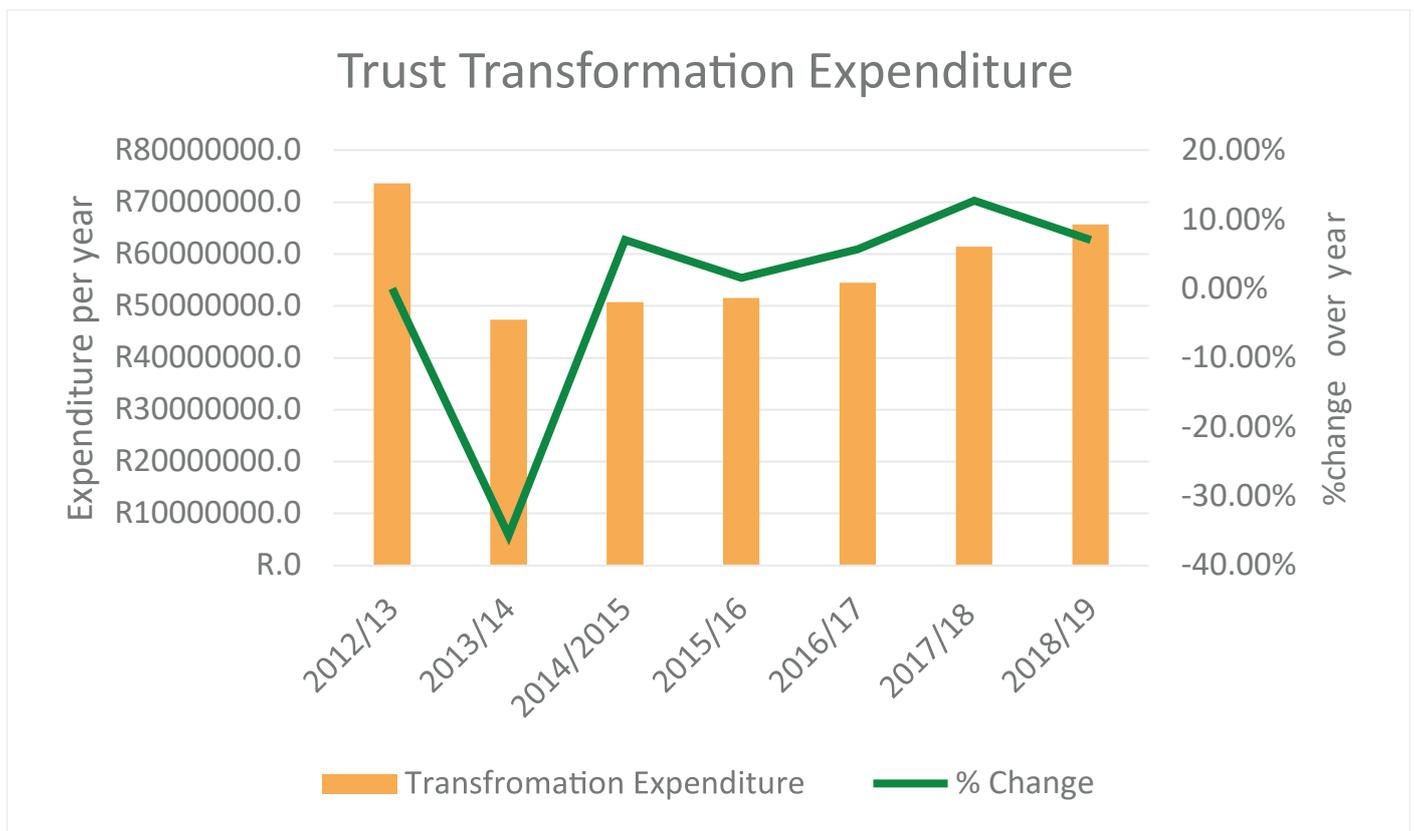


Figure 1: Trusts' transformation expenditure for the period 2017/18 and 2018/19 survey

4.3 Field Crops Trusts

The Grain Farmers' Development Association (GFADA) is the transformation conduit of the four-grain trusts, namely the Maize Trust, Sorghum Trust, Winter Cereals Trust, and Oil and Protein Seeds Development Trust.

4.3.1 Maize Trust Funding

Noteworthy is that the Maize Trust follows the transformation guidelines of the NAMC. However, it does not administer or collect statutory levies. On an annual basis, the trust generally exceeds 25 % of the trusts' annual income spend on transformation. The transformation focus of the Maize Trust is placed on farmer development, training and skills development, bursaries, and direct farm support. The trust also manages an annual bursary scheme for MSc and PhD students. The aim is to stimulate studies in maize-related fields and to create skilled capacity in South African agriculture. In terms of the trust's policy, at least half of the bursaries are granted to previously disadvantaged students at all the South African universities. The trust spends approximately R1,9 million per annum on bursaries and training programmes for black farmers. The Maize Trust approved an amount of R17,7 million to support individual maize farmers in respect of the 2018/19 season. The summary of budget allocation per transformation pillar is shown in Table 3.

Table 3: Maize Trust expenditure on transformation

Transformation pillar	Amount
Training or bursaries	R 1 980 000
Individual farmer support	R 17 700 679
Total	R19 680 679

4.3.2 Sorghum Trust Funding

The Sorghum Trust does not administer or collect statutory levies but follows the transformation guidelines of the NAMC. The trust's annual contribution to transformation generally exceeds 20 % of the trust's annual income. Funds from the trust are granted every year to GFADA for direct farmer development, training and skills development support. The trust also manages to fund a bursary for one student towards achieving a Master's of Science Degree in Agriculture. For 2018/19, an amount of R60 000 was spent on a bursary for only one student. Transformation funding by the trust is granted to several complementary programmes, to achieve a broad spectrum of transformation functions that are needed to create new black commercial maize farmers. The Sorghum Trust allocated an amount of R436 001 to fund new sorghum farmers in respect of the 2018/19 season.

4.3.3 Oil and Protein Seeds Development Trust Funding

The transformation of the Oil and Protein Seeds Development Trust (OPDT) is focused on training, mentorship, the supply of information, enterprise development, community projects, bursaries and technology transfer. The typical commodities are groundnuts, sunflowers, soybeans and canola. For the 2018/19 period, the trust managed to spend approximately R6 697 537 on transformation. The highest proportion of this money was spent on individual farmer support (R4,9 million), training (R1,2 million), and enterprise development or community projects (R923 857). Other activities funded included the provision of bursaries and information or technology transfer.

Table 4: Summary of OPDT expenditure on transformation

Activity	Province	No. of beneficiaries	Amount spent
Information (Pula/Imvula) – quarterly newsletter	All provinces (9)	21 000 copies distributed	R379 755
Student bursaries	All provinces (9)	8 MSc and PhD	R320 000
Community/enterprise development/ training - The development and training of entry-level soybean farmers; - Consumers – Eden Social Development Foundation	KwaZulu-Natal	1005 soybean farmers	R923 857
Farmer support, training, soybean awareness (GFADA)	North West, Eastern Cape, Free State and KwaZulu-Natal	11 farmers (farmer support) and 45 farmers (soy awareness)	R4 944 714
Training	All provinces (9)	Support training for sunflowers, soybeans, groundnuts, canola and soybeans)	R129 211
Total expenditure			R6 697 537

4.3.4 Winter Cereals Trust Funding

The main focus of the trust with regard to transformation is on the development of black farmers in the industry to become sustainable commercial farmers. The farmer development programmes are run based on a holistic farming programme which entails crop rotation systems. These programmes are being executed in collaboration with the other trusts (Maize Trust, Oil and Protein Seeds Development Trust, Sorghum Trust) and financiers of inputs. In addition to farmer development, the trust further funds capacity building for the industry. Capacity building in respect of human development is fourfold: bursaries, internship, post-doctoral and industry succession plan. The Winter Cereals Trust's expenditure on transformation is presented in Table 5. For the period under review, an amount of R15 762 088 was spent on transformation activities. The highest proportion (85 %) of this money was spent on farmer enterprise development (Approximately R13,4 million) on 85 projects within the Eastern Cape, Limpopo, KwaZulu-Natal and Western Cape provinces.

Table 5: Winter Cereals Trust's transformation projects supported under GFADA

Transformation pillar	Activities	Province	Utilization		
			No. of farmers	Amount (R)	
1	Enterprise development	Social correction, crop insurance, mentorship and production inputs	Eastern Cape	2	794 987
			Limpopo	1	984 976
			KwaZulu-Natal	1	396 129
			North West	86	9 745 864
			Western Cape	13	1 526 391
	Subtotal		85	13 448 347	
2	Skills development	Technical support		414 150	
3	Management control			1 004 399	
4	Other			264 971	
5	Bursaries		7	630 221	
Total expenditure on transformation					R15 762 088

4.4 Horticultural Trusts

4.4.1 Citrus Industry Trust

The beneficiaries of the trusts fund within the citrus industry are the Citrus Academy (CA) and Citrus Growers' Association – Grower Development Company (CGA-GDC), with a key focus on skills development and enterprise development respectively. The trust remains committed to transformation through ensuring that there is active participation of black designated groups in the citrus value chain. In 2018, the CA supported 24 students from primary school education to tertiary education with bursaries worth a total of R500 000 from the trust. The allocation for 2019 is valued at R450 000. Moreover, CGA-GDC received a total of R50 000 from the trust to compile three bankable business plans for the three selected citrus farms in the Limpopo Province. Table 6 presents the details of the projects funded through the trust's funds.

Table 6: Details of the projects funded in the citrus industry through the Citrus Industry Trust

Activity description	Number of beneficiaries	Units (ha or no.)	Expenditure (R)	Market supplied	Volume (tons)
Business plan – proposed expansion 77 ha	12	123 ha	16 238, 26	75 % export, 20 % local, 5 % juicing	5 500
Business plan – diversify from 45 ha vegetables to establish 120 ha citrus	3	45 ha vegetables, 120 ha proposed citrus development	16 238, 26	Local vegetables	-
Business plan – diversify from mango and vegetables to add 60 ha citrus	1	63 ha mango, 60 ha proposed citrus development	16 236, 26	Local	-

4.4.2. Deciduous Industry Development Trust

Currently, the trust funds bursaries for postgraduate students to the value of R350 000 and believes that investment in human capital remains key to the future of the deciduous fruit industry and agriculture as a whole. The trust is currently working on its enterprise development initiatives to ensure that real transformation happens on the ground. One of its strategies is to reduce funding for bursaries and to use the transformation vehicle referred to as the Deciduous Fruit Development Chamber to be its implementation entity on all the transformation projects.

4.4.3. Potato Industry Development Trust

The trust funds Potatoes South Africa (PSA) as its implementing vehicle for all the trust's activities. Guided by the NAMC's transformation guidelines, more than 20 % is spent on transformation. PSA's transformation programme includes the support of black producers to successfully establish their potato farming ventures. This support ensures that the producers are properly skilled through the provision of training related to enterprise development and the technical aspects of potato farming. It further ensures that mentors are responsible for knowledge transfer to new farmers, as well as managing potato enterprises. The tertiary skills development pipeline offers bursaries and internships to ensure that there is a pool of graduates who can add value to agriculture.

- › **Enterprise development programme:** The main focus of the trust is enterprise development where farmers are assisted with business plans, potato seed, training, mentorship and linking them with other agribusinesses to develop black commercial farmers in various potato regions in South Africa. Currently, the expenditure on enterprise development is approximately R5,7 million annually. The strategy on enterprise development is based on expanding hectares of deserving producers, hosting regional meetings to disseminate information, and creating partnerships with various stakeholders such as the Jobs Fund, McCain, Nulandis, NTK/VKB, Afgri and provincial government departments.
- › **Small Grower Development Programme:** This programme can be categorized under socio-economic initiatives which play a crucial role in terms of food security. The communities from rural areas are taught how to plant and harvest potatoes on their own to enhance food security. In instances where there is surplus produce, the crop is sold to the local markets. The trust has partnered with various provincial departments of agriculture and, during the year under review, 15 communities were supported, reaching an average number of about 750 people. Although the hectares planted ranged from 0,5 ha to 2 ha, the average produce in the case of the Vryheid project for three cultivars was estimated at 41 tons/ha for Mondial, 60 tons/ha for Electra and 43 tons/ha for Panamera.
- › **Training:** Training is crucial in ensuring that the newly established farmers are upskilled to manage their business ventures successfully. Previously, PSA conducted a skills audit where gaps were identified, and since then, PSA has been focusing on providing the training that was identified by the skills audit. The skills audit indicated a great need for financial management and plant production training.
- › **Tertiary skills development pipeline:** This programme focuses on offering bursaries to needy and academically deserving students, and provides internship and workplace opportunities. The desired outcomes of this programme are to develop young talent through tertiary education that builds on the sustainability of the business; to provide exposure to the potato value chain, and to enable candidates to make informed decisions about their career choices based on exposure and experience.

Table 7: Details of the potato projects funded through the Potato Industry Development Trust

Programme Name	Province	Total Beneficiaries	Unit Hectares	Expenditure (R)	Market Supplied	Total Jobs Created
Enterprise Development Programme	The programme is active in four (4) provinces, namely: KwaZulu-Natal, Eastern Cape, Limpopo and Western Cape	16 [KwaZulu Natal (1); Eastern Cape (2), Limpopo (10) and Western Cape (3)]	272 ha	5 745 658	Fresh produce markets, processors, exports to Mozambique, and the informal markets (bakkie and informal traders)	150
Small Grower Development Programme	The programme is active in two (2) provinces, namely: KwaZulu-Natal (Appelsbosch, Port Edward, Weenen, Harding & Jozini) and Eastern Cape (Flagstaff, Stutterheim, Bizana, Mqanduli, Mthatha & Qumbu)	15 communities (50 members per community on average)	5 ha	267 873	Surplus sold in the community and neighbouring communities	-
Farm-Based Training – Financial Management	Limpopo, KwaZulu-Natal and Eastern Cape	45	-	371 200	-	-
Tertiary Skills Development Pipeline	Colleges: (Potchefstroom, Eisenburg, Lowveld & Glen) and Universities: (Stellenbosch, Pretoria, Free State, TUT, Limpopo, Venda, North West, Fort Hare, Zululand, Mangosuthu & CUT)	27	-	542 583	-	-

4.5 Livestock Trusts

4.5.1 Mohair Trust

Mohair Trust transformation is done through the Mohair Empowerment Trust, which is a separate entity to the Mohair Trust. The Mohair Empowerment Trust was established in 2010 to drive black economic empowerment projects within the mohair industry. The goal for the Empowerment Trust is to develop sustainable large-scale black mohair producers. These producers can contribute to the mohair industry as a whole, by providing them with the goats via interest-free loans and giving them training and ongoing support. The table below illustrates the details of each project. The Mohair Empowerment Trust has nine projects which are mostly situated in the Eastern Cape, with one in the Western Cape. These projects are benefiting 17 individuals with 4451 goats that were supplied to them. The Trust has spent R3 372 258 on the project and created 68 jobs.

Table 8: Transformation projects of the Mohair Trust

Province	Farm Location	Number of Beneficiaries	Goats Received	Money Spent	Jobs Created
Eastern Cape	Weltevrede	2	306	287 186	8
Eastern Cape	Brakfontein	2	782	932 365	8
Eastern Cape	Irene	2	333	412 427	8
Eastern Cape	Doornrivier	2	1313	1 160 580	8
Western Cape	Tulpleegte	2	300	259 484	4
Eastern Cape	Matatiele	2	208	261 946	4
Eastern Cape	Rietfontein	2	490	489 500	4
Eastern Cape	Driefontein	1	619	639 350	4
Eastern Cape	Geluk	2	100	90 000	20
Total		17	4451	3 372 258	68

With regard to the above projects, the Mohair Empowerment Trust is also responsible for all costs associated with the transformation and delivery of consignments or any associated costs for the projects. The trust is obliged to serve as a member of the Project Management Team (PMT) and to oversee the functions and operations of the PMT and to remain involved in the projects. The PMT is required to meet every two months at any property of the projects. The PMT is responsible for physical inspections from time to time, as well as the evaluation and monitoring of the clip quality, the evaluation and assessment of financial and administrative producers in respect of commercial mohair farming operations, the assessment of the general commercial viability of the projects and the identification of risks, and the monitoring of whether the project adheres to the Sustainability Mohair Guidelines published by the mohair industry.

4.5.2. Wool Trust

The Wool Trust's transformation projects are directed at transforming smallholder wool producers to be commercial producers while also integrating black, small-scale and communal producers into the wool industry. The main focus of the trust's transformation initiatives includes: organizing small-scale communal wool sheep producers into wool grower groups and assisting them to collectively harvest, class and pack wool to access the commercial wool market; prioritizing and supporting infrastructure development initiatives (i.e. shearing infrastructure) in partnership with government and other stakeholders, including the private sector; supporting and implementing genetic improvement initiatives to improve the quality and quantity of wool produced by black small-scale and emerging producers; awarding bursaries to previously disadvantaged persons to enable them to obtain relevant qualifications and to endeavour to find employment for these bursary holders in the wool or related industries; and creating jobs through shearer training. Table 9 shows a summary of the expenditures during the 2018/19 financial year for Wool Trust's transformation initiatives.

Table 9: Transformation projects funded by the Wool Trust

Focus Area	Expenditure (Rand)
Enterprise development - Zulukama Youth Wool Project - Bursaries	308 750 165 000
Skills Development - Training and Development - Job Creation (Shearer Training)	8 708 358 3 145 175
Total	12 327 283

PROFILES OF TRANSFORMATION PROJECTS FUNDED

Queenstown Production Advisor: A production adviser has been placed in the Queenstown area on a three-year contract basis to mentor and train emerging black communal farmers, to train youth groups in the Zulu Kama area of Whittlesea, and to establish a veld ram club in Elliott. The demographics of the farmers in this area have changed considerably over the past few years, with many black emerging communal farmers receiving commercial farms under the land reform programme. The magisterial districts of Maclear, Ugie, Lady Grey, Elliott, Indwe, Dordrecht, Sterkstroom and Queenstown need special mention. These farmers have a tradition of wool-sheep farming, but their levels of wool production are less than those of the previous landowners due to their relatively low commercial farming skills. There was a need for an experienced production adviser, to guide and mentor/coach these farmers to develop into fully-fledged and successful wool farmers.

The total volume of wool produced by the developing commercial sector and supported by the Queenstown office decreased by 46 % between 2013 and 2019. Over the same period, the RSA wool clip declined by 14 %, while the wool clip of the commercial sector under the jurisdiction of the Queenstown office declined by only 11 %. This demonstrates the devastating impact that the current drought has had on this developing farming sector. The emerging farmers in the area were organized into five study groups, with the training of each study group taking place every two months on a topic relevant to the production cycle of the sheep during that time of the year. The farmers were also exposed to successful farmers in the area where they could experience what they had been taught during training first hand. A total of six such visits were conducted. The farmers were also exposed to the wool value chain in Port Elizabeth, and total four such visits in total were conducted. The coaching of the two ram breeders is progressing well and the number of rams provided by the two breeders to the genetic improvement project of the National Wool Growers' Association (NWGA)

was 16 rams in 2016, followed by 30 rams in 2017, then 75 rams in 2018 and 76 rams in 2019. The wool income of the two breeders increased by 377 % and 226 % respectively since the start of the project.

Zulukama Project – Communal Agricultural Transformation (CAT) Project: The Olive Leaf Foundation (OLF) is a sustainable development organization with 30 years’ experience in community mobilization. Established in 1989, OLF helps rural communities to effectively manage their existing assets (land and livestock) to promote economic upliftment, restore degraded land, and provide viable climate change solutions. As an extension of the Zulukama work begun in 2014 with seven Youth Wool Growing Co-operatives, the CAT project has grown out of the pilot phase. It is currently in the standardization phase, incorporating entire villages. In collaboration with the various stakeholders, including Cape Wool, OLF is training six villages in regenerative land and livestock management, with a focus on wool production as the economic driver. The outcomes of the project highlight the untapped potential of communal areas in terms of wool production, food security, land restoration, unemployment and climate change adaptation – all crucial elements for meaningful transformation in South Africa.

Bursaries: Since the establishment of the Bursary fund, 35 students have graduated, of which 17 have been employed in agriculture-related industries and six are employed in other sectors. Bursaries awarded in 2019 are reflected in Table 10.

Table 10: Transformation bursaries awarded by the Wool Trust

Name of Bursary Holder	Gender	Demographic Group	Field of Study	Funding Allocated
Shiba, Innocentia	F	B	Dip. in Agriculture	R25 000
Ngwane, Sandile	M	B	Dip. in Agriculture	R25 000
Zenda, Mashford	M	B	PhD in Animal Science	R40 000
Ngani, Anda	F	B	BA of Arts in Fashion	R25 000
Schroeder, Amy	F	C	MSc in Biodiversity and Conservation Biology	R25 000
Cunningham, Aljoran	M	C	MBA	R25 000
TOTAL				R165 000

Skills Development and Transfer: The Wool Trust has been contributing funding towards rural development programmes in the Eastern Cape, Free State and Kwazulu-Natal since 1997. Production advisors train these communities in basic skills for effective wool-sheep production, wool handling and classing, handling and movement of sheep, breeding and selection, disease control and animal health, predation management, and veld, pasture and nutrition management. Table 11 below illustrates the courses offered during 2019. A total of 166 courses were presented and attended by 3688 individuals. The demand for these courses is very high.

Table 11: Courses undertaken and funded through the Wool Trust in 2019

Course	No. of Communities	Attendance
Flock Health Course	36	650
Flock Nutrition Course	10	314
Shearing Shed Management Course	72	1 538
Money Management Course		
Sheep Breeding Course	52	1 186
TOTAL		3 688

Market Readiness and Market Access: A total of 443 sheds were visited by production advisors to prepare these sheds for shearing and to provide assistance/mentorship in respect of classing and clip preparation for the market. A total of 1187 sheds sold their wool through the auction system, compared to 943 in the previous wool season. This increase could be attributed to harsh economic conditions, as producers endeavoured to improve their cash flow by selling to speculators and receiving a spot price for their wool, as highlighted in Table 12 for detailed statistics. The wool that was sold through the auction system decreased by 12.6 % (or 685 122 kg). Drought conditions are still seen as the main reason for the decline. The income received for the communal wool sold through the auction system increased by 12.2 % (R46.8 million) to a value of R336.9 million. The average price for communal wool increased by 5.5% (from R70.75/kg in 2018 to R71.14/kg in 2019), compared to an increase in the average price of all wool of only 12.6 %.

Table 12: Communally produced wool presented for marketing through the auction system

Season	Kilograms Available for Auction	Value (Rand)	National Average Price (R/kg)	Communal Average Price (R/kg)
97/98	222 610	1 502 908	1 225	675
99/00	336 700	1 965 557	1 102	584
01/02	535 911	6 927 640	2 277	1 293
03/04	2 029 556	17 768 955	2 109	876
06/07	2 345 991	30 791 496	2 594	1 313
08/09	2 666 933	43 149 706	2 548	1 618
10/11	3 027 276	71 749 104	3 900	2 370
11/12	3 555 077	113 015 898	3 657	3 179
12/13	3 461 937	131 842 578	5 537	3 803
13/14	3 806 993	137 919 368	6 016	3 623
14/15	3 582 123	130 849 388	6 863	3 652
15/16	4 462 089	233 618 024	7 740	5 235
16/17	5 812 641	299 882 007	8 205	5 159
17/18	5 422 122	383 607 431	9 907	7 075
18/19	4 737 000	336 979 827	11 265	7 114

It is customary to recognize those shearing sheds/wool growers who have achieved outstanding results in developing their sheep projects for increased wool income. Five regional winners, as well as an overall winner, received the 2019 NWGA/Zoetis Prestige Awards. Besides being a regional winner, Luzie was also elected as the overall winner in the annual competition with a total index of 58/60, considering criteria relating to net income, bin bales, average bale mass, clean yield, auction indicator and kilogram fleece. Lucie produced good quality sheep and is on the same level as commercial farmers.

Job Creation: The trust annually funds a shearer training programme which provides employment opportunities for many unemployed previously disadvantaged persons. The shearer training programme was held in various locations, and 14 regional, provincial and national shearing championships were hosted during the reporting period. Furthermore, 824 shearers were trained during the reporting period, including 279 beginner blade shearers, 130 intermediate blade shearers, 19 machine shearer instructors, 198 beginner machine shearers, and 198 intermediate machine shearers.

Production Advisor Project for Communal Areas: The communal areas started with 846 wool growers' associations (or shearing sheds) in 1997, which increased to 1187 by 2019. There is a dire need for production advisory services in these areas. The Wool Trust is funding the deployment of six production advisors in the Eastern Cape communal areas that were previously funded by the DRDAR. The Wool Trust has committed to funding this critical project to the amount of R9,3 million over the period 30 June 2017 to 30 June 2020.

4.5.3 National Lucerne Trust

The National Lucerne Trust (NLT) is of the view that agricultural transformation is crucial for economic and social transformation. Still, for this to happen, the NLT believes that upgraded skills sets are needed across the entire lucerne industry value chain. The NLT's transformation of previously disadvantaged individuals is aimed at ensuring the development of emerging farmers to grow and produce commercially in a sustainable way and to extend their access to marketing opportunities with an emphasis on enterprise and supplier development, and training and skills development programmes. The agricultural sector is a key economic driver and determines the viability of many communities throughout South Africa, especially in the rural areas of our country. The local and international markets for lucerne hay and seed products present a great opportunity for the establishment and sustainable growth and development of smallholder lucerne farmers. The income growth of smallholder farmers is fundamental to economic and social development, to the farmers' ability to reinvest in their farms, and to the sustainable supply of lucerne products to the local and international market. The NLT is committed to assisting smallholder farmers in moving from subsistence to commercially oriented agricultural systems, thereby increasing their income and profit from production.

The NLT's key focus areas of transformation during the year under review

Enterprise and Supplier Development: The goal of the NLT's Enterprise and Supplier Development Programme is to assist in the sustainable growth and development of smallholder farmers to grow and produce commercially in a sustainable way. Smallholder farmers depend on access to good quality seed, which is fundamental to their production systems. During the year under review, the NLT donated lucerne seed to smallholder farmers in the North West and Western Cape provinces. The NLT also focused on exposing the farmers to market-related information. Going forward, the NLT wants to invest in a hand-held near-infrared (NIR) spectrophotometer instrument for the grading of lucerne hay of smallholder farmers in the Eastern Cape Province. There will also be a greater focus on partnerships between the NLT, industry role-players, and smallholder farmers. A total amount of R112 848 has been spent on input costs for high-quality seed.

Training and Skills Development: The goal of the NLT's Training and Skills Development Programme is to empower smallholder farmers with the necessary knowledge and skills to compete on a local and international level. During the year under review, the NLT focused on the development and growth of smallholder farmers by providing training ranging from the cultivation of lucerne to the marketing of the end product. The training is mainly based on knowledge generated by research done in the past by the NTL. The NLT also funded the lucerne-hay grading course fees of black lucerne hay producers, near-infrared spectrophotometer operators, lucerne hay graders, lucerne hay buyers and government officials. A total amount of R132 372 was spent on the payment of lucerne hay grading course and lucerne hay workshop fees.

Socio-economic Development: During the year under review, the NLT was involved in the Oudtshoorn Rotary Santa Shoebox Project. This project is a community initiative that co-ordinates the donation, collection and distribution of personalized Christmas gifts to underprivileged children in orphanages, children's homes, care centres and farm schools in Oudtshoorn and surrounding rural areas. The spending in this regard amounted to a donation of R11 154 towards this project.

4.5.4 Meat Industry Trust

The Meat Industry Trust currently finances student bursaries amounting to R660 000. The trust is currently in the process of implementing new transformation initiatives to address the real enterprise needs of black farmers in the meat industry.

4.6 Challenges faced by the agricultural industry trusts with regard to transformation

Winter Cereals Trust: Climate change and the competitiveness of winter cereals crops compared to other grains crops are the major challenges facing the trust with regard to the development of black emerging farmers. There has been a drastic shift towards the summer crops (maize, soybeans and sunflower) by black farmers as a result of the challenges mentioned above. Farmers view wheat as a high-risk crop compared to other summer crops due to the shift in the rainfall pattern, yield and price competitiveness. South African producers can produce enough wheat and eliminate imports, but the low wheat yields (tons/ha) and prices discourage farmers from planting wheat. It is for this reason that the Winter Cereals Trust has prioritized research projects that address these challenges faced by farmers.

Potato Industry Development Trust: The trust focuses on access to finance for enterprise development farmers to ensure continuation and expansion after exiting the programme. Access to land, infrastructure and equipment remains a challenge for enterprise development farmers. The Minister could assist in liaising with government agencies and the banks regarding the extension of development finance to enterprise development farmers, as well as engagement with the Department of Land Affairs to explore opportunities in terms of access to land.

SECTION FIVE: PRODUCTION AND TRADE INFORMATION

5.1 Potato Industry Development Trust

Currently, the total number of potato producers in the industry is estimated at 540. The Potato Industry Development Trust supported 16 black producers during the year under review with the resources available to them. Cognizance must be taken of the fact that there are many more black potato producers than before. At the same time, some black producers have also graduated from the enterprise development programme and are farming at a commercial level. It should be noted that the number of hectares farmed by black producers increased from 210 ha to 272 ha between 2018 and 2019.

5.2 Wool Trust

The number of wool producers in the industry is currently estimated at 8025 commercial and 40 000 smallholder farmers (mainly communal farmers). Table 13 shows that over the seven years, the commercial sector has been in dominance with an average of 44,7 million kg of greasy wool producers. In contrast, smallholder wool production is averaged at over 4,4 million kg of greasy wool over the seven years. Notably, there was a decrease in the 2018/19 season, recording 4,9 million kg of greasy wool in the commercial sector, and a 0,7 million kg decrease in the smallholder sector during the same season.

Table 13: Wool production in volume trends to showcase transformation progress in the sector (million kg greasy wool)

Trust	Producer Category	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Wool	Commercial	46,1	46,7	46,2	45,3	46,6	43,5	38,6
	Smallholder	3,5	3,8	3,6	4,5	5,8	5,4	4,7

National Agricultural Marketing Council Core Divisions

AGRICULTURAL INDUSTRY TRUSTS

The Industry Trusts are managed by board of trustees, in which the Minister is represented. The Ministerial trustees are entrusted to ensure that the Industry Trusts carry out the objectives of the Trust deeds, by aligning them to government transformation mandate. The Ministerial trustees will then report to the Agricultural Trusts division of the NAMC on the operation and financial performance of the Trusts in which the NAMC should communicated that to the Minister.

Moreover, the Industry Trusts portfolio, the division is also entrusted to monitor activities on transformation in the agricultural sector.



Agricultural Industry Trusts

The Agricultural Trusts Division is responsible for the nomination process of the Ministerial trustees, and advice the Minister of agriculture, forestry and fisheries with proposed names who then do appointment. As part of Ministerial trustees' capacity development, training on corporate governance is facilitated to capacitate trustees with the skills on corporate governance and financial management.



Industry Transformation Support

Through the Council, the Transformation Review Committee (TRC) was established in 2014, to independently review, comment and provide inputs to the transformation business plans supplied by the industries; to monitor the transformation activities supported by the industries, and to establish how government can collaborate with industries in support of transformation.

The Committee was established to independently monitor the administration and utilization of the 20% transformation levy income and expenditure. Furthermore, ensure that industries adhere with the NAMC guidelines in spending the 20% levy fund.

AGRIBUSINESS DEVELOPMENT

The Agribusiness Development Division (ADD) of the National Agricultural Marketing Council was established in 2006 to collaborate with various institutions both nationally and internationally in designing and implementing programmes that are aimed at increasing market access, encouraging new business development and capacity building of historically disadvantaged enterprises. The NAMC strategic placement and relationship with public and private institutions built over many years enabled the Agribusiness Development division in facilitating programmes that have the potential to achieve the government outcomes.

The Agribusiness Development Division collaborates with government, industry and academia to provide programs such as:



Market Access

This programme aims at increasing market access for smallholder farmers. This programme is divided into three categories, namely: market information, market access and business development support



Capacity Building

Having recognized the skills deficiencies within the country's agricultural sector, the ADD has contributed to capacity building efforts by designing and facilitating the delivery of various training programmes through various partnerships and collaborations.



NRMDP

National Red Meat Development Programme is a red meat program anchored by the Department of Rural Development and Land Reform to assist communal livestock farmers in linking them to formal red meat value chain

STATUTORY MEASURES

The purpose of the Statutory Measures Division is to facilitate the process to implement statutory measures in order to promote the efficiency of the marketing of agricultural products. In support of this goal, the following objectives are pursued:

- ◇ To implement statutory measures in support of the objectives of the Marketing of Agricultural Products Act.
- ◇ To enable the relevant industries to collect funds to finance important generic functions; and,
- ◇ To enable the relevant industries to collect and disseminate important agricultural information in order to promote growth within the specific industry.



Statutory Measures Applicable

There are currently 22 industries that have statutory measures relating to registration, records and returns, and 18 industries that have statutory levies.



Agricultural Products

For purposes of the Marketing of Agricultural Products Act, 1996 (Act No. 47 of 1996), the Minister approved the products declared as agricultural products.



Crop Estimates Liaison Committee

During 1998 the Minister for Agriculture and Land Affairs requested the National Agricultural Marketing Council (NAMC) to chair the Crop Estimates Liaison Committee (CELC), who is represented of directly affected groups in the different grain industries.

RESEARCH

The Markets and Economic Research Centre (MERC) was established in 2007 as part of the transformation of NAMC and expanding its functions to enable it to dispense more evidence-based markets and economic advice to the Minister and other stakeholders. MERC is an economic and market research programme that tracks economic trends, provides market information and undertakes marketing policy research. Its research focuses on three main focus areas in line with the strategic objectives of the NAMC: agro-food chains and markets; trade and; smallholder market access



Agro-Food Chains

Farm-to-retail price releases, monthly, quarterly and annual food price analyses, grains supply and demand estimates reports.



Smallholder Market Access

Studying factors contributing to successful access to agri-markets, especially for smallholder farmers and new entrants.



Trade

This focus area undertakes studies on current and potential export markets for South African products.

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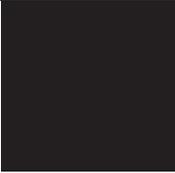
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