



# NAMMC

Promoting market access for South African agriculture

## A REPORT<sup>1</sup> BY THE NATIONAL AGRICULTURAL MARKETING COUNCIL ON THE STATUS OF AGRICULTURAL INDUSTRY TRUSTS IN SOUTH AFRICA



2023/24 SURVEY





# ACKNOWLEDGEMENTS

Annually, the National Agricultural Marketing Council (NAMC) produces a comprehensive report on the development of Agricultural Industry Trusts in collaboration with Trust administrators. The administrators submit the required information according to the guidelines provided through the NAMC questionnaire. We would like to express our sincere gratitude to the Trust administrators for their seamless and timely data submission. This report is based on the information they provided and verified.



**Compiled by** Nokuthula Khulu, Vusimusi Sithole, Nomantande Yeki, Phelelani Sibiya, Matsobane Mpyana, Malapane Thamaga & Bonani Nyhodo



# TABLE OF CONTENTS

---

List of Tables .....	4
List of Figures .....	4
Acronyms .....	4
Executive summary .....	5
 <b>SECTION 1: THE ACTIVITIES OF THE NATIONAL AGRICULTURAL MARKETING COUNCIL ON AGRICULTURAL INDUSTRY TRUSTS</b> .....	 6
1.1. Background .....	6
1.2. Highlights of the Activities Performed During the Reporting Period .....	6
1.2.1. Engagement between the NAMC and the Agricultural Industry Trusts .....	6
1.2.2. Appointment of ministerial Trustees .....	6
 <b>SECTION 2: GENERAL TRUST INFORMATION</b> .....	 7
2. Trust Information and Background .....	7
2.1. Introduction .....	7
 <b>SECTION 3: FINANCIAL INFORMATION</b> .....	 9
3.1. Summary .....	9
3.2. Trust asset bases for the 2022/23 and 2023/24 financial years .....	9
3.3. The outlook on the Trust assets .....	11
3.3.1 Field crops Trusts .....	11
3.3.2 Horticultural Trusts .....	11
3.3.3 Livestock Trusts .....	11
 <b>SECTION 4: OUTLINE OF INDUSTRY STRUCTURES</b> .....	 12
 <b>SECTION 5: CONCLUSION</b> .....	 14
 <b>SECTION 6: ANNEXURES</b> .....	 15

# LIST OF TABLES

Table 1: Representation within the boards of the industry Trusts .....	8
Table 2: Trusts' asset bases for the 2022/23 and 2023/24 financial years .....	9

# LIST OF FIGURES

Figure 1: 2024 Agricultural Industry TrustTrust Workshop official photo .....	7
Figure 2: Trusts with asset values over R60 Million for 2022/23 and 2023/24 financial years .....	10
Figure 3: Trusts with asset value below R60 Million for the 2022/23 and 2023/24 financial years .....	10

# ACRONYMS

<b>AAMP</b>	Agriculture and Agro-Processing Master Plan
<b>AEF</b>	Agro-Energy Fund
<b>ARC</b>	Agricultural Research Council
<b>BFAP</b>	Bureau for Food and Agricultural Policy
<b>BWC</b>	Bursary Working Committee
<b>CIT</b>	Citrus Industry Trust
<b>CEO</b>	Chief Executive Officer
<b>DAG</b>	Directly Affected Groups
<b>DALRRD</b>	Department of Agriculture, Land Reform and Rural Development
<b>DFIDT</b>	Deciduous Fruit Industry Development Trust
<b>GFADA</b>	Grain Farmer Development Association
<b>MET</b>	Mohair Empowerment Trust
<b>MIT</b>	Meat Industry Trust
<b>MT</b>	Maize Trust
<b>MSc</b>	Master of Science
<b>NAMC</b>	National Agricultural Marketing Council
<b>NWGA</b>	National Wool Growers Association
<b>NLT</b>	National Lucerne Trust
<b>OPDT</b>	Oil and Protein Seeds Development Trust
<b>PGP</b>	Phahama Grain Phakama
<b>PhD</b>	Doctor of Philosophy
<b>PIDT</b>	Potato Industry Development Trust
<b>PSA SA</b>	Potatoes South Africa, South Africa
<b>SAWCIA</b>	South African Winter Cereal Industry Agency
<b>SAGL</b>	Southern African Grain Laboratories
<b>SAGRA</b>	South African Grain Farmers Association
<b>SAGIS</b>	South African Grain Information Service
<b>SANSOR</b>	South African National Seed Organization
<b>SLAs</b>	Service Level Agreements
<b>TRC</b>	Transformation Review Committee
<b>VCRT</b>	Value Chain Round Table



## EXECUTIVE SUMMARY

The Agricultural Industry Trusts were established in 1997 in terms of the Trust Property Act (57 of 1988) and the Marketing of Agricultural Products Act (47 of 1996) as part of the dissolution of the Control Boards. Establishment of the Agricultural Industry Trusts was part of the market deregulation process, moving away from single marketing channels. The mandates of the newly established Agricultural Industry Trusts were identified as follows:

- i. to protect the assets,
- ii. to grow the assets in line with the Consumer Price Index (CPI plus), and
- iii. to use the proceeds from the investments to finance industry work.

As per the Trust Property Act, each Agricultural Industry Trust has a Trust Deed that specifies its objectives and beneficiaries and is led by a Board of Trustees. Industry stakeholders, as well as the Minister, are represented on these boards.

This report by the National Agricultural Marketing Council (NAMC) outlines the status of the Agricultural Industry Trusts in South Africa for the 2023/24 financial year. It covers the activities of the NAMC related to these Trusts, general information and the financial performance of the assets. The report aims to provide the Minister of Agriculture, the Portfolio Committee on Agriculture, and Directly Affected Groups (DAG) with up-to-date information on the performance, governance, and Agricultural Industry Trusts. Notably, the combined asset value of these Trusts increased by approximately **R83 million** during the period under review, reaching R2.61 billion, driven by the recovery in investment markets. The Wool Trust experienced absolute growth, while the Sorghum Trust had relative percentage growth. The Maize Trust saw the most significant decline due to underperformance in its investment portfolio. At the same time, the Oil and Protein Seeds Development Trust (OPDT) recorded a slight asset value reduction that was similarly linked to its portfolio's performance. During the period under review, the Agricultural Industry Trusts demonstrated a generally positive economic environment and a commitment to their mandates as stipulated in their respective deeds of Trust.

The Winter Cereal Trust (WCT) is being wound up under Section 15 of its Trust Deed. This process emerged from discussions between the Ministerial representative and appointed representatives of industry stakeholders constituting the Board of Trustees. A two-member winding-up committee oversees the proceedings, comprising a ministerial representative and an industry representative supported by legal advisors. To address the gap left by WCT, the wheat industry collaborated with the Minister to establish the South African Winter Cereal Industry Agency (SAWCIA) on 1 October 2024. SAWCIA was designated as the administrator of winter cereals' statutory levies.

# SECTION 1: THE ACTIVITIES OF THE NATIONAL AGRICULTURAL MARKETING COUNCIL ON AGRICULTURAL INDUSTRY TRUSTS

## 1.1. Background

The activities carried out by the Agricultural Industry Trusts Division of the NAMC during the reporting period are described in Section 1, along with the coordination efforts between Agricultural Industry Trusts and the Minister of Agriculture. The Minister, Mr John Steenhuizen, was briefed on key initiatives, including:

- Appointing ministerial Trustees (based on recommendations, with final approval granted by the Minister).
- Coordinating visits between the Minister and the Trusts to gather first-hand insights and enable direct engagement.
- Submitting the Status Report to update the Minister on their operational progress.

Detailed information on each activity is provided in subsequent subsections.

## 1.2. Highlights of the Activities Performed During the Reporting Period

### 1.2.1. Engagement between the NAMC and the Agricultural Industry Trusts

The annual Agricultural Industry Trust Workshop of the NAMC was held at the Agricultural Research Council (ARC) in Weavind Park on 30 April 2024. Administrators and departmental representatives from these Trusts convened as key stakeholders to discuss sectoral achievements and challenges. The South African Winter Cereal Industry Trust (due to internal difficulties) and the Mohair Trust (owing to urgent industry priorities) were absent, though nine entities participated. The workshop aimed to strengthen collaboration and communication between the Agricultural Industry Trusts and the former Department of Agriculture, Land Reform, and Rural Development (DALRRD). Discussions highlighted the importance of strategic partnerships in addressing sectoral challenges and driving growth. Dr Sifiso Ntombela, Special Advisor to the Minister of the DALRRD, officially represented the office.

The Chairperson of the NAMC Council, Mr Angelo Petersen, opened proceedings positively by reviewing transformation efforts and progress achieved over the past year. He highlighted asset growth within the Trusts, which are driven by rebounding investment markets and effective transformation strategies. The Agricultural and Agro-processing Master Plan (AAMP) briefing showed significant advancement, but reporting gaps created confusion about the actual progress. The government is committed to improving stakeholder communication for clear development and disclosure of outcomes. The 2023 Trust status report was presented, acknowledging their contributions to sectoral transformation, governance frameworks, and funding programmes, alongside concerns about delays in Trustee registration processes at the Master of the High Court. Workshop discussions featured updates from administrators on governance protocols, asset management, and transformation milestones alongside key challenges and opportunities. The sorghum industry faced two significant problems: limited financial assistance and VAT compliance issues. These entities have redirected their resources to high-impact initiatives and are working on collaborative solutions. The Potato Industry Development Trust has made substantial progress in Limpopo through plans for a chips production facility, while the Meat Industry Trust has focused on targeted transformation strategies.

The special advisor to the Minister acknowledged the Trusts' work and emphasised continued support, adaptation, and enhanced partnerships to achieve AAMP goals. The NAMC's Chief Executive Officer (CEO) ended by highlighting the move towards enterprise development and urged more funding and collaboration to bring about real change in the agricultural sector. The NAMC submitted a comprehensive Status Report to the Minister for future monitoring and strategic guidance. The report included updates on Trust performance, governance matters, and ongoing transformation initiatives.

### 1.2.2. Appointment of ministerial Trustees

The Trust Deeds appreciate the Minister's authority to appoint or replace ministerial Trustees in the event of term expirations or resignations. This year, there have been several key changes. Dr Vincent Vacu has been appointed as a ministerial representative to serve on the Board of Directors of the South African Cultivar and Technology Agency (SACTA), replacing Mr Ayanda Mbotshelwa. Ms Nokhanyo Maceba was re-appointed to serve a second term in the Potato Industry Development Trust (PIDT). The term of office for Mr Malapane Thamaga, who served as a Ministerial Trustee on the Maize Trust, has been terminated following his appointment to the NAMC staff, and finalising his replacement is in the advanced stages. After the Minister of Agriculture approves the candidates, the NAMC will



appoint the new Trustees through an NAMC-administered induction programme for their effective onboarding. The induction process is essential to ensure that the new Trustees are adequately prepared for their roles. It focuses on the NAMC's role regarding the industry Trusts and unpacks their governance structures, helping Trustees fully understand their responsibilities. The induction also includes a clear explanation of the terms of office for the Trustees and how they will represent the Minister within the respective Trusts. Trust administrators also present their individual activities and operational focus to provide a comprehensive overview of their duties during the session.



**Figure 1:** 2024 Agricultural Industry Trust Workshop official photo

**Source:** NAMC Communications

## SECTION 2: GENERAL TRUST INFORMATION

### 2. Trust Information and Background

#### 2.1 Introduction

This section provides information on the governance of the Agricultural Industry Trusts, including their administrative structure and Board of Trustees, comprising 61 members: 40 representing the industry role players and 21 representing the Minister. A notable trend is the increasing number of female ministerial Trustees, while the gender composition of the industry representatives remains relatively dominated by men. **Table 1** shows the general information, administration, board members of each Trust, and industry board representation.

**Table 1: Representation within the boards of the industry Trusts**

Trust Category	Name of the Trust And Administrator	Administrator	Trust Age (years)	Board of Trustees
Field crops	Maize Trust: Agri Manage Solutions (Pty) Ltd	Mrs B. de Witt	27	<b>Industry representatives:</b> Mr B.C. Schoonwinkel (Vice-chairperson), Mr D.J.M. Mathews, Mr B. Mokgatle <b>Ministerial representatives:</b> Mr Z. Ngejane (Chairperson), Mr G.S. Mafuleka, Mr M.K. Thamaga (Outgoing)
	Sorghum Trust: Agri Manage Solutions (Pty) Ltd	Mrs B. de Witt	27	<b>Industry representatives:</b> Mr W.J. Groothof (Chairperson), Mr D. Beets (Vice Chairperson), Mr R.E. Pholo <b>Ministerial representative:</b> Ms T. Moagi (Incoming), Mr HT. Mohane (Outgoing)
	National Lucerne Trust	Mr FP. Ruppig	29	<b>Industry representatives:</b> Mr D.E. Malan (Chairperson), Mr J J A. Potgieter, Mr R.H. Roselt, Mr H.B Megaw, Mr A. Beyers and Mr G Ivan <b>Ministerial representative:</b> Mr C.S. Bhiya
	Oil and Protein Seeds Development Trust.	Mr G. Keun	28	<b>Industry representatives:</b> Mr A. Moosa (Chairperson), Dr A. van der Vyver; Ms J. Tselentis; Mr R.E Pholo; Mr G. Roos; Mr D. Schutte; <b>Ministerial representatives:</b> Mr S. Shandu, Ms D.R Mosehla
Horticultural crops	Citrus Industry Trust: Fruit South Africa	Ms F. Ratshitanga	26	<b>Industry representatives:</b> Mr J. Brand, Mr P. Dempsey and Mr S. Maqoma <b>Ministerial representatives:</b> Dr H. Lefophane, Dr F. Thovhogi, and Ms H. Makhuvha.
	Deciduous Fruit Industry Development Trust: HORTGRO	Ms K. Bezuidenhout	26	<b>Industry representatives:</b> Mr N Dicey (Chairperson), Ms L Visagie <b>Ministerial representatives:</b> Ms N Williams, Dr E Blancquart, Mr J. Mthombeni, Ms W. Peterson
	Potato Industry Development Trust: Potatoes South Africa	Mr H. Oberholzer	22	<b>Industry representatives:</b> Dr B.J. Pieterse (Chairperson), Mr W. M. Fourie, Mr D.H van Zyl, Ms M. Thompson <b>Ministerial representative:</b> Ms N. Maceba
Livestock	Meat Industry Trust: Red Meat Levy Admin (Pty) Ltd	Carolie Viviers and Taimlin Swart	30	<b>Industry representatives:</b> Mr D. Olivier, Mr W. Clack, Dr F. Nherera-Chokuda, <b>Ministerial representatives:</b> Dr Z. Majokweni (Chairperson), Ms U. Speirs and Ms S. Sekhoto
	Mohair Trust: Mohair South Africa	Mr. Marco Coetzee	31	<b>Industry representatives:</b> Mr R. Kirsten (Chairperson), Mr J. Louw; Mr DG. Short; Mr. D Pringle and <b>Ministerial representative:</b> Mr A. Dladla
	Wool Trust	Mr A.W van de Venter	28	<b>Industry representatives:</b> Mr FPR. van Wyk (Chairperson); Mr A.R. Kidson; Dr A. Moore; Mr L.I. Maduna; Mr R.A. Kirsten; and Mr I.G. Whittal <b>Ministerial Representative:</b> Dr L. Makuleni -Tomson



## SECTION 3: FINANCIAL INFORMATION

The primary mandate of Agricultural Industry Trusts is to safeguard (keep the assets evergreen) their assets and allocate the proceeds to support the growth and development of their respective industries. The performance of these Trust assets is a key factor in the continued success of agricultural initiatives. Each Trust oversees the management of its assets for research, transformation, capacity building and other industry-focused activities. This section focuses on the performance of these Trust assets in achieving the sector's objectives.

### 3.1. Summary

The asset value of Agricultural Industry Trusts went up by approximately **R83 million** to R2.61 billion during the 2023/24 financial year due to the recovery in investment markets. The increase of R83 million is slightly less than the prior financial year's increase of R83.6 million. The Maize Trust and Oil and Protein Seeds Development Trust (OPSDT) declined by 3.36% and 0.73%, respectively. The Maize Trust has the most extensive comparative asset base at R1.1 billion. In contrast, the National Lucerne Trust has the smallest at R1.8 million, even though it performed second best with a 14.45% increase from the previous year. Agricultural Industry Trusts' assets increased by approximately R82 million to R2.61 billion in the 2023/24 financial year due to the investment markets' recovery. This growth is somewhat less than the R83.6 million increase recorded in the previous financial year.

### 3.2. Trust asset bases for the 2022/2023 and 2023/2024 financial years

An overview of the strategic goals and financial standing of South Africa's Agricultural Industry Trusts for the 2022/23 and 2023/24 financial years is shown in **Table 2**, along with the corresponding changes in their asset values. The rise in investments and financial assets led to an R83 million increase in asset value, closing at R2.61 billion for the 2023/24 financial year compared to R2.57 billion the previous year. Although the Maize Trust declined by R37 million, its R1.1 billion asset base maintains its position as the most significant Trust. While the sector's overall asset value increase suggests a favourable economic climate, Trust-specific research reveals varied performance and strategic approaches.

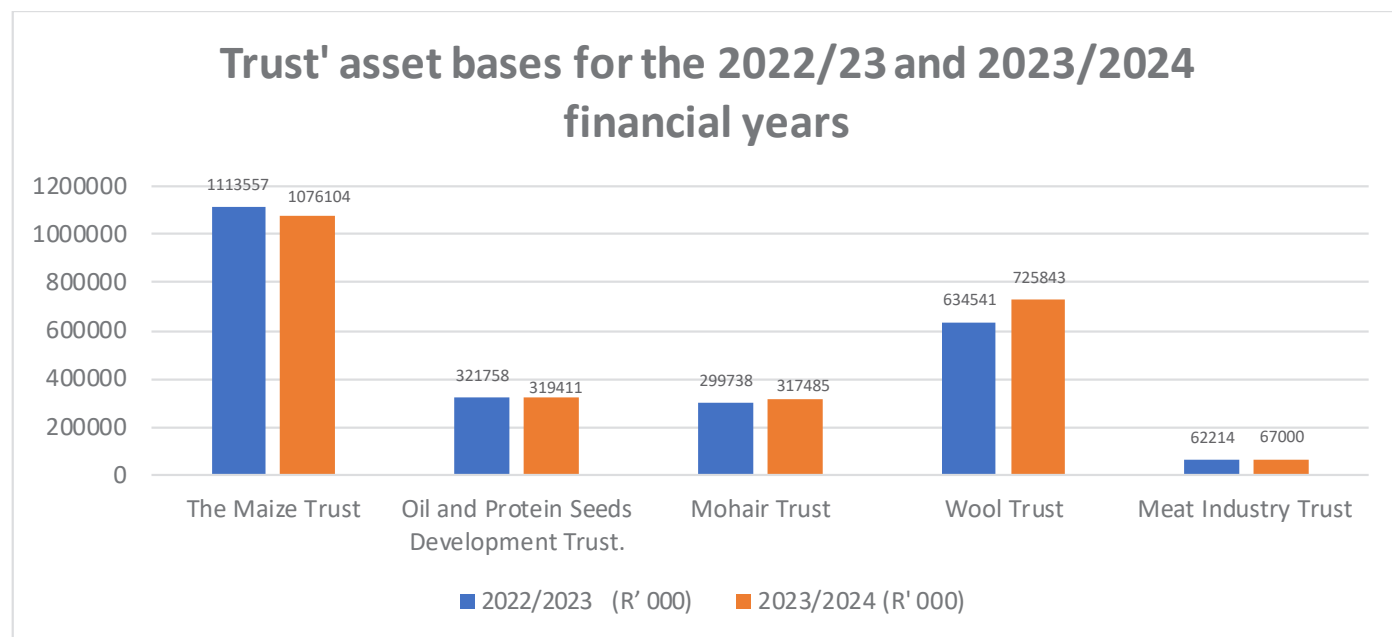
**Table 2:** Trusts' asset bases for the 2022/2023 and 2023/2024 financial year.

**Table 2: Trusts' asset bases for the 2022/23 and 2023/24 financial years.**

Trust Name	2022/2023 (R' 000)	2023/2024 (R' 000)	Change (R' 000)	%Change
The Maize Trust	R1 113 557	R1 076 104	-R37 453	3.36
Wool Trust	R634 541	R725 843	R91 302	14.39
Oil and Protein Seeds Development Trust.	R321 758	R319 411	-R2 347	0.73
Mohair Trust	R299 738	R317 485	R17 747	5.92
Meat Industry Trust	R62 214	R67 000	R4 786	7.69
Citrus Industry Trust	R18 982	R19 282	R300	1.58
The Sorghum Trust	R24 967	R30 714	R5 747	23.02
Potato Industry Development Trust	R24 130	R25 659	R1 529	6.34
Deciduous Fruit Industry Development Trust	R21 621	R22 952	R1 330	0.66
National Lucerne Trust	R1 799	R2 059	R260	14.45
Winter Cereal Trust	-R47 192	-	-	
<b>Total</b>	<b>R2 570 499</b>	<b>R2 606 509</b>	<b>R83 201</b>	

**Source:** Trust Balance sheets and own calculations (2025)

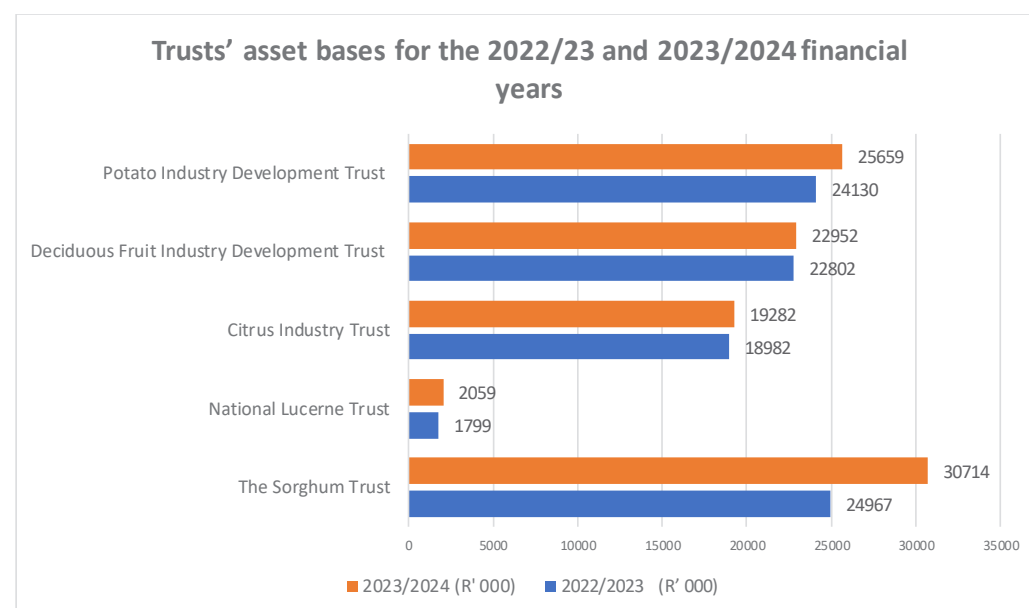
**Figure 1** below illustrates the values of assets above R60 million of various Agricultural Industry Trusts over the 2022/23 and 2023/24 financial years. It provides insights into absolute values (in R'000) for both years.



**Figure 2:** Trusts with asset values over R60 Million for 2022/23 and 2023/24 financial years

**Source:** Trust Balance sheets and own calculations (2025)

The analysis of Trust assets for the 2022/23 and 2023/24 financial years shows considerable differences in the financial performance of various agricultural Trusts. Some Trusts experienced notable growth, while others faced declines, which reflect industry-specific trends and investment outcomes. The Wool Trust experienced the highest absolute growth, increasing by R91.3 million (14.39%), followed by the Mohair Trust (R17.7 million, 5.92%) and the Meat Industry Trust (R4.8 million, 7.69%). The Sorghum Trust had the highest percentage growth at 23%. In contrast, the Maize Trust experienced the most significant decline, dropping R37.5 million (3.36%), while the Oil and Protein Seeds Development Trust decreased by R2.3 million (0.73%). The Winter Cereal Trust, worth R47 million as of 2022/23, has faced challenges. Consequently, it has transitioned to the South African Winter Cereal Industry Agency (SAWCI). The Trust's winding-up is in its final stages, and SAWCIA is now being implemented. The valuations of assets below R60 million held by various Agricultural Industry Trusts for the 2022/23 and 2023/24 financial years are graphically depicted in **Figure 2** below. It offers information on asset values for both years (in R'000)





**Figure 3:** Trusts with asset value below R60 Million for the 2022/23 and 2023/24 financial years

**Source:** Trust Balance sheets and own calculations (2025)

The Deciduous Fruit Industry Development Trust recorded the lowest growth rate at 0.66%, amounting to R150 000. The Potato Industry Development Trust (PIDT) recorded a 6.34% increase (R1.5 million), indicating a positive sector trend. The improvement follows a R5.5 million decrease in the previous financial year. The National Lucerne Trust (NLT), the Trust with the smallest asset base, reported a 14.5% increase, marking its second consecutive year of growth in the 2023/24 financial year, following a decrease in the previous year. While most Trusts showed growth, the performance variations highlight differences in market dynamics, investment returns, and industry-specific challenges.

### **3.3. The outlook on the Trust assets**

#### **3.3.1 Field crops Trusts**

**The Maize Trust:** The Maize Trust's investments are managed by Allan Gray, Coronation, and Ninety-One Asset Managers, with investment advice from Willis Towers Watson. The Trust's asset value decreased by R37 million, from R1.11 billion in 2022/23 to R1.07 billion in the 2023/24 financial year, due to channelling more funding towards research.

**Oil and Protein Seeds Development Trust:** Market volatility and increased transformation funding caused the Trust's asset value to drop by 0.73%, or R2.34 million, from R321 million in the 2022/23 financial year to R319 million in the 2023/24 financial year. Old Mutual Wealth, Allan Gray, and Foord oversee the Trust's investments.

**The Sorghum Trust:** The Sorghum Trust's asset value rose from R24.9 million (2022/23) to R30.7 million (2023/24), representing a 23% increase—the highest percentage growth among all Trusts. Nedbank Private Wealth manages its investment portfolios.

**National Lucerne Trust (NLT):** Due to increased debtors, the Trust's asset value increased by R279 000, from R1.79 million in 2023 to R2.05 million in the 2024 financial year.

#### **3.3.2. Horticultural Trusts**

**Citrus Industry Trust:** The Trust's asset value increased from R18.9 million in 2022/23 to R19.3 million in 2023/24, reflecting a growth of approximately R300 000, attributed to the outstanding market performance of the investments. Allan Gray manages the Trust's assets.

**Deciduous Fruit Industry Development Trust:** The Trust's asset value increased from R22.8 million in 2022/23 to R21.6 million in 2023/24 by R1.3 million. The growth was driven by the appreciation of Old Mutual investments, as Old Mutual manages the Trust's assets.

**Potato Industry Development Trust:** The asset value of the Potato Industry Development Trust (PIDT) rose by R1.5 million, representing a 6.34% growth from R24.1 million in the 2022/23 financial year to R25.6 million in the 2023/24 financial year. The Trust experienced growth mainly because of higher levy tariffs, which increased its revenue. ABSA manages the Trust's investments. The PIDT holds only Non-Current Assets as its main assets, while its Current Assets consist primarily of cash and receivables. The balance of cash and receivables may fluctuate annually, depending on the Trust's operational activities and income at year-end.

#### **3.3.3 Livestock Trusts**

**Meat Industry Trust:** The Trust's current asset value is R67 million, representing an increase of approximately R4.8 million or 7.7% from the previous financial year, attributed to market volatility.

**Mohair Trust:** The Trust's assets are currently valued at R317 million, an increase of R17.7 million from R299.7 million in the previous financial year. The increase can be attributed to the growth in financial assets and investments, which grew by 6%. The Mohair Trust is responsible for its bookkeeping, with Old Mutual managing its investment portfolio.

**Wool Industry Trust:** Fundhouse Investment Advisors (Pty) Ltd and Zakly Investments One (Pty) Ltd act as financial advisors to the Trust. The Trust's total assets reached R725.8 million during the 2023/24 financial year, an increase of R91 million (14.39%) from the previous year.

## SECTION 4: OUTLINE OF INDUSTRY STRUCTURES

This section outlines the entities that work directly with the Trusts to fulfil their mandates, providing a brief overview of each organisation's scope of work.

### The Maize Trust

The Trust funds various industry bodies, including the Southern African Grain Laboratory (SAGL), South African Grain Information Services Institute (SAGIS), Agricultural Research Council (ARC), Grain SA, Phahama Grain Phakama NPC (PGP), Bureau for Food and Agricultural Policy (BFAP), University of Stellenbosch, Sandy Soils Development Committee, North-West University, the Demand and Supply Committee, South African Grain Farmers Association (SAGRA), Cape Peninsula University, University of Pretoria, and The South African National Seed Organization (SANSO). All Trust beneficiaries submit biannual reports on the progress and results of the projects funded, including:

- Grain SA Farmer Development Programme: Training, mentoring, and developing emerging farmers into self-sustaining commercial farmers.
- ARC: Research and technology transfer activities focus on benefiting emerging farmers and addressing their specific needs.
- The Maize Trust Bursary Scheme: Developing capacity for highly skilled personnel within South Africa's grain industry.
- Grain SA Schools Programme: Informing previously disadvantaged learners about agriculture and career opportunities.
- Industry beneficiaries: Improving maize quality, yield, and resistance to diseases and pests maintains the competitiveness of South African farmers in the international marketplace.

### The Sorghum Trust

All Trust beneficiaries submit biannual reports on the progress and results of the projects funded. Structures and beneficiaries include:

- ARC: Research and technology transfer activities focus on benefiting emerging farmers and addressing their specific needs.
- Grain SA Scholarship Scheme: Developing capacity for highly skilled personnel within South Africa's grain industry.
- Industry beneficiaries: Improving sorghum quality, yield, and resistance to diseases and pests maintains the competitiveness of South African farmers in the international marketplace. The Sorghum Trust does not administer statutory levies, but its transformation programme follows NAMC's guidelines. The Trust funds Grain SA annually for transformational activities like training, technology transfer, and farmer skills development. Furthermore, the Trust supports the Agricultural Research Council (ARC) for research and technology transfer on emerging farming practices and needs.

### National Lucerne Trust

The NLT Board consists of four to seven Trustees, including one representative of the Minister of Agriculture, Land Reform, and Rural Development. The remaining Trustees represent various sectors of the lucerne industry, including seed producers, cleaners, merchants, hay producers, processors, and smallholder farmers.

### Oil and Protein Seeds Development Trust (OPDT)

The structures of Oils Seeds Industry comprises of the Oil and Protein Seeds Development Trust (OPDT), Oilseeds Advisory Committee, SA Groundnut Forum, Sunflower, Soybean and Soyfood Forum, and Research Priority Committee. Beneficiaries include ARC-GCI, SAGL, NAMC, WCDA, SAGIS, FABI, University of Pretoria, BFAP, Eden Social Development Foundation, University of the Free State, Grain SA, FarmSol, Stellenbosch University, and the Mpumalanga Department of Agriculture, Rural Development, Land and Environmental Affairs.

### Potato Industry Development Trust (PIDT)

Potatoes South Africa, the Trust's administrator, is the only industry structure reporting to it and is responsible for implementing its strategic priorities. The Trust has internal committees, including the Potato Industry Development Trust, the Risk and Audit Committee, the Bursary Committee, the Research and Technical Advisory Committee, and the Potato Transformation Advisory Committee. These committees serve as advisory bodies, informing the Trust about various activities and projects' strategic implications and relevance.



## **Meat Trust**

The industry has a Bursary Working Committee (BWC) dealing with MSc and PhD student bursaries.

## **Mohair Trust**

The Mohair Trust collaborates with various industry structures, including:

- Mohair South Africa, which is responsible for promoting the industry;
- South African Mohair Growers Association (SAMGA), representing all mohair producers in South Africa;
- Mohair Empowerment Trust (MET), focussing on industry empowerment;
- Mohair Brokers Association, representing brokers;
- Mohair Buyers Association, representing buyers;
- Mohair Processors Association, representing processors;
- Angora Ram Breeder's Society, representing angora goat genetics and
- Farmworkers Association, representing mohair farm workers.

## **Wool Trust**

Cape Wools South Africa (Cape Wools SA) is the sole beneficiary and reporting organisation of the Wool Trust. As the official representative body for the South African wool industry, Cape Wools SA represents the collective interests of wool producers, wool buyers, and processors, wool brokers, and traders, small stockbreeders, workers, and wool testing group. Through partnerships with major wool-producing nations, it promotes the interests of the wool community both locally and abroad.

## **Winter Cereal Trust and SAWCIA**

Established in 1997, the Winter Cereal Trust (WCT) aimed to finance research on winter cereal production in the Republic of South Africa, encompassing scientific, technological, and industrial aspects. The Trust's secondary objectives included promoting the South African winter cereal industry through research funding, information gathering, market expansion for domestically produced winter cereals, and managing the Wheat Forum. Due to its challenges, the WCT is undergoing a winding-up process, as Section 15 of its Trust Deed stipulates. The events leading to the Trust's termination date back to the tenure of the former Minister, Thoko Didiza. These challenges are outlined in Court papers (described mainly in the Termination Application, case no. 115177/2023). The evolution of events until the subsequent approach of the courts details the reasoning behind the challenges. The fact that the dispute was already pending in court made it difficult for the former Minister of Agriculture to intervene and mediate between the ministerial and industry Trustees. In the absence of a legislative levy and the low level of voluntary levy collection, the issue had negatively impacted the winter cereals industry.

The NAMC CEO and the DG of DALRRD investigated possible solutions to protect the industry. Consequently, the WCT is undergoing termination as stipulated in Section 15 of its Trust Deed. This process is managed by a two-person winding-up committee, one member representing the Winter Cereal Industry, Mr Jannie Devilliers, and the other the Ministry, Mr Mongoato, as provided for in the settlement agreement. Prinsloo Bekker Attorneys are assisting the winding-up committee. At the start of the winding-up process, the WCT had assets valued at R47.2 million. The winter cereal industry has since established the South African Winter Cereal Industry Agency (SAWCIA) as a replacement for the WCT. The SAWCIA was officially established on 1 October 2024 as the governing body administering statutory measures related to the winter cereal industry. Therefore, SAWCIA will be responsible for the affairs of the winter cereal industry.

These responsibilities include collecting and managing statutory levies from commodities such as wheat, barley, and oats. The levies are imposed on all winter cereal products sold, imported, processed, or exported within South Africa, as outlined in the statutory measures gazette on 27 September 2024. As per the Memorandum of Incorporation of SAWCIA, its Board of Directors is made up of eight (8) directors as follows:

- One (1) director shall be a representative nominated and appointed in writing by the Minister.
- Two (2) directors shall be representatives of winter cereal producers in the Republic, with Grain SA and SAGRA each nominating and appointing one (1) director in writing.
- Two (2) directors shall be representatives of winter cereal processors in the Republic, with the NCM and SACB each nominating and appointing one (1) director in writing.
- One (1) director shall represent the winter cereal storage sector, nominated and appointed in writing by Agbiz Grain.

- One (1) director shall represent the end-consumer sectors of winter cereals in the Republic, nominated and appointed in writing by SANCU.
- One (1) director shall represent the cereals and oilseeds trading sectors, nominated and appointed in writing by SACOTA.

The Minister of Agriculture recently appointed Mr Happy Mohane as the ministerial representative on the SAWCIA Board of Directors. In 2025, SAWCIA is expected to collect its first round of taxes.

## SECTION 5: CONCLUSION

The Agricultural Industry Trusts have demonstrated resilience and growth during the 2023/24 financial year under review, with total assets increasing to **R2.61 billion**. The positive development stems mainly from recovering domestic and international investment markets, demonstrating these institutions' essential functions in supporting agriculture. The NAMC's active role in coordinating activities, facilitating the appointment of ministerial Trustees, and fostering collaboration among Agricultural Industry Trusts is essential for ensuring effective governance and alignment with the Agriculture and Agro-processing Master Plan (AAMP).

The NAMC acknowledges and thanks the Trust administrators, boards of Trustees, transformation managers and officers, and all other stakeholders in the ten industry Trusts for their continued assistance in informing the Minister and Portfolio Committee about transformation projects and asset bases. The NAMC praises the Agricultural Industry Trusts for their outstanding work in protecting assets and ensuring investment returns are utilised to finance industry operations.



## SECTION 6: ANNEXURE

### Annexure 1: 2024 Survey Questionnaire

#### Agricultural Industry Trusts Questionnaire – 2024 Survey

To:

Agricultural Trusts Administrators/CEOs

Status Report on Agricultural Industry Trusts (2023)

For:

The Minister of Agriculture

#### **The rationale of the survey**

*This questionnaire is distributed to the Agricultural Industry Trusts to assess the status quo in their operations and present it to the Minister. The Minister is primarily interested in whether the assets are increasing or decreasing (and associated reasons) and seeks a clear overview of the activities funded by the Trusts. More specifically, to get an idea of the individual Trust's work aimed at redressing the imbalances of the past (Transformation) and for the National Agricultural Marketing Council (NAMC) to compile the "Status Report on Agricultural Trusts – 2024 Survey". The report covers the previous year to accommodate auditing requirements. The Trust administrators/CEOs are requested to provide the NAMC with the following information.<sup>2</sup>:*



## SECTION A: TRUST BACKGROUND

- a. Who (person and company) is the Trust's administrator?
- b. Where is the Trust located in the local municipality/district?
- c. How many personnel are employed by the administrator, and what are the demographics of the employees (e.g., gender, age, and race)?
- d. When was the Trust established?
- e. Who are the current members of the board of Trustees, and what is their representation?
- f. Who is the chairperson of the Trust?
- g. What is the duration of the current serving chairperson?
- h. Has there been any significant change in the leadership of the Trust in the past year?
- i. What is the Trust's primary area of focus or sector within the agriculture industry?

## SECTION B: TRUST ASSET(S)

- a. How much is the current value of all assets?
- b. List the names, locations, and values of each asset.
- c. By how much did it increase or decrease from the previous financial year?  
What are the reasons for the changes in the value of assets?
  - i. If there was a decrease, what measures have been implemented to address it?
  - ii. If there was an increase, what were the contributing factors? Does the change affect the Trust's ability to fund its operations/activities?
- d. Which investment portfolio company or companies are used for the Trust funds?
- e. Which company is doing the bookkeeping for the Trust?
- f. Which company is doing the financial audit for the Trust?

## SECTION C: INDUSTRY FUNDING

- a. How many industry bodies are funded by the Trust, their role and amount spent? Please list them.
- b. Does the Trust also implement any activities?
  - i. If yes, do these activities link developing farmers to the markets?
  - ii. Based on the answer above, how many developing farmers have been linked to the markets?
- c. What are the areas of focus for the Trust's budget?
- d. Can you provide a budget breakdown of the activities funded by the Trust or through the Trust funding?  
Please specify the benefit(s) of the activities funded by the Trust towards the entire industry. Please elaborate.  
What is the impact of the work funded?  
How does the Trust make the funding decision (a pre-set amount or based on the budget from the beneficiary institutions)?
- e. Are there any new or emerging areas where the Trust plans to allocate funding? If yes, please provide details.
- f. How does the Trust assess the performance of the industry bodies and projects it funds?

## SECTION D: DEED OF TRUST

- a. Please attach the latest copy of the Trust Deed.
- b. Was the Deed of Trust amended in 2023/24?
  - i. If "Yes", please provide details and the date of the amendments.
  - ii. If "No", when was the last amendment made (year and date)?
  - iii. Are there any plans to amend it or is the process already unfolding (if yes, how far)?
- c. Was there any legal advice sorted on matters pertaining to its operations during the reporting period?
- d. Does the Trust have any plans to change its mandate or scope in the near future? If yes, please provide details.

## SECTION E: INDUSTRY STRUCTURES

- a. How many industry structures (organisations/committees) report to the Trust? Please list them.
- b. What is the role of each of these structures?  
Does the Trust experience any challenges in running its affairs, regarding the Master of High Court and/or industry?  
If yes, how would you like the NAMC to intervene?
- c. How does the Trust ensure transparency and accountability in its operations?
- d. Are there regular reports or updates provided to stakeholders? If yes, how often? Specify the reports provided.  
Have there been any significant changes in the industry structures that could affect the Trust's operations?

## SECTION F: TRANSFORMATION

- How much has been spent on transformation by the Trust during the reporting period?
- What transformation activities are currently funded by the Trust? Please include the budget breakdown per activity. How is the implementation of transformation structured within the Trust?
- What partnerships have been formed with different organisations in the implementation of transformation activities?
- What are the challenges faced by these transformation projects?
- Should the NAMC and or government do more in terms of assisting Trusts with transformation? If yes, how?
- How is the employment equity of the Trust administrator? Please highlight race and gender.
- Is there any impact on the transformation funded by the Trusts?
  - If yes, what are the success stories from the transformation activities funded?
  - If not, what are the potential reasons?
- Does the Trust have strategies and targets in terms of transformation? Please provide brief details.

## SECTION G: MARKET ACCESS

- How many farmers were linked with markets by the Trust during the reporting period?
- Kindly indicate the length of time (years) that the farmers have been supplying the market?
- What are the challenges faced by the farmers in supplying the markets?

## SECTION H: AGRICULTURE AND AGROPROCESSING MASTER PLAN (AAMP)

The AAMP was signed by the social partners in the agriculture and agro-processing sectors in South Africa as a social compact and strategy for inclusivity and economic growth. Please use the table below to indicate the various programmes that are currently being implemented by the Trust and align the to the specified six pillars of the AAMP

AAMP Pillars	Activities	Target timeline	Responsible stakeholder	Budget
Resolving policy ambiguities and creating an investment-friendly environment.				
Investing in and maintaining enabling infrastructure.				
Providing comprehensive farmer support, developmental finance, R&D, and extension services.				
Improving food security, increasing production and employment, and ensuring decency and inclusivity.				
Facilitating market expansion, improving market access, and promoting trade.				
Improving localised food production, reducing imports, and expanding agro-processing exports.				

**Please note: Agricultural Industry Trusts are also required to submit financial statements for the financial year corresponding to the information provided in this questionnaire.**

**Date sent out: 12 November 2024**

**Due date: 5 February 2025**

Thank you for your cooperation in providing this vital information to compile the 'Status Report on Agricultural Trusts – 2024 Survey'. Your contribution is valuable for assessing the industry's progress and informing policy decisions.

**Annexure 2: Agricultural Industry Trusts Administrators Contact details**

<b>Industry Trusts</b>	<b>Contact person</b>	<b>Administrator</b>	<b>Email address</b>	<b>Contact number</b>
Citrus Industry Trust	Ms Fhumulani. Ratshitanga	Ms F. Ratshitanga	Fhumulani@fruitsa.co.za	Tel: 012 007 1150
Deciduous Fruit Industry Development Trust	Ms Karien. Bezuidenhout	Ms. K. Bezuidenhout	anton@hortgro.co.za	Tel: 021 870 2900
Maize Trust	Ms B. de Witt	Ms B. de Witt	beatrix@llagric.co.za	Tel: 012 807 3958
Meat Industry Trust	Ms A. du Plessis	Ms C. Viviers & Taimlin Swart	aletd@levyadmin.co.za	Tel: 012 348 7572
Mohair Trust	Mr Deon. Saayman	Mr M. Coetzee	marco@mohair.co.za	Tel: 041 487 1386
National Lucerne Trust	Mr Fritz Ruppig	Mr. F. Ruppig	fritz@lusern.org	Tel: 082 823 7201
Oil and Protein Seeds Development Trust	Mr Gerhard. Keun	Mr. G. Keun	oliesade@opot.co.za	Tel: 011 234 3400
Potato Industry Development Trust	Ms E. Elsa	Ms. E. Elsa	Elsabe@potatoes.co.za	Tel: 012 349 1906
Sorghum Trust	Ms B. de Witt	Ms B. de Witt	Beatrix@llagric.co.za	Tel: 012 807 3958
Wool Trust	Mr A. van der Venter	Mr A. van der Venter	andre@wooltrust.co.za	Tel: 041 484 4307



## NOTES:

**Contact Details:**

Office Park, Ground Floor, Barbet  
Place, 177 Dyer Rd, Hillcrest, Tshwane.

**Tel:** 012 341 1115

**Fax:** 012 341 1811

**Email:** [Info@namc.co.za](mailto:Info@namc.co.za)

**Designed:** Rodney Khoza

**Images:** [Unsplash.com/Freepik.com](https://unsplash.com/Freepik.com)

