



NAMMC

Promoting market access for South African agriculture



2024 AGRICULTURAL TRANSFORMATION STATUS REPORT



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ABBREVIATIONS AND ACRONYMS

AAMP	Agriculture and Agro-processing Master Plan
AgriBEE	Agricultural Black Economic Empowerment
ARC	Agricultural Research Council
BBBEE	Broad-Based Black Economic Empowerment
BCI	Better Cotton Initiative
BEE	Black Economic Empowerment
CASP	Comprehensive Agricultural Support Programme
CFSA	Cape Flora South Africa
CGA	Citrus Growers Association
CGA-GDC	Citrus Growers Association Grower Development Company
Co-op	Co-operative
DAG	Directly Affected Groups
DFIDT	Deciduous Fruit Industry Development Trust
DALRRD	Department of Agriculture Land Reform and Rural Development
DIRCO	Department of International Relations and Cooperation
DoA	Department of Agriculture
DRDAR	Department of Rural Development and Agrarian Reform
DTIC	Department of Trade Industry and Competition
EC	Eastern Cape
EIA	Environmental Impact Assessment
ETN	Ethical Trade Norway
FNB	First National Bank
GP	Gauteng Province
HACCP	Hazard Analysis and Critical Control Points
KZN	KwaZulu Natal

LDARD	Limpopo Department of Agriculture and Rural Development
M & E	Monitoring and Evaluation
MAP Act	Marketing of Agricultural Products Act
MIT	Meat Industry Trust
MP	Mpumalanga Province
MSc	Master of Science
NAMC	National Agricultural Marketing Council
NLT	National Lucerne Trust
NWGA	National Wool Growers Association
OAC	Oilseed Advisory Committee
OPDT	Oil and Protein Seeds Development Trust
PDI	Previously Disadvantaged Individuals
PGP	Phahama Grain Phakama
PhD	Doctor of Philosophy
PIDT	Potato Industry Development Trust
PLAS	Pro-Active Acquisition Strategy
POMASA	Pomegranate Association of South Africa
PSA	Potatoes South Africa
ROI	Return on Investment
RPO	Red Meat Producers' Organisation
SA	South Africa

EXECUTIVE SUMMARY

The National Agricultural Marketing Council (NAMC) is responsible for investigating applications of statutory measures, reporting to the Minister of Agriculture, and assessing and reviewing such measures at least every two years. These responsibilities are set out in Section 9 of the Marketing of Agricultural Products (MAP) Act (47) of 1996. Since 2001, the NAMC has conducted an annual review of all statutory measures implemented under the MAP Act (including levies, records and returns, and registration). The report focuses on the status of transformation interventions funded through statutory levy income and trust expenditure as part of the industry's commitment to inclusivity. In accordance with the NAMC's guidelines, 20% of the agricultural trust and statutory levy funds are used for transformation initiatives. During the 2023/24 financial year, trusts and levy funds spent over R267 million on transformation initiatives: trusts contributed R73.4 million, while levy administrators provided R193.4 million. Of the total transformation expenditure, 85% was allocated to enterprise and skills development, amounting to R173.8 million and R53.8 million, respectively. In addition, R29 million was spent on management control, while R9.7 million and R125 080 went to socio-economic development and ownership categories, respectively. The spending aligns with the recommendations of the NAMC Generic Guidelines. Compared to the previous period, expenditure on transformation has increased by R6.7 million, from R260.3 million in 2022/23 to R267 million in 2023/24, despite the Maize Trust withholding R10 million in transformation spending.

1. INTRODUCTION

This report provides an overview of transformation activities funded by statutory levies and agricultural industry trust funds for the 2023/24 period. The Marketing of Agricultural Products Act (No. 47 of 1996) enables industry financing through these levies and trusts, which support various activities in the agricultural sector. Transformation is a crucial pillar funded through these instruments in alignment with the NAMC guidelines. For a long time, funding focused on training, mentorship, social projects, and the development of materials. However, in recent years, the approach has shifted towards enterprise and skills development, as well as management control. This report highlights transformation-related activities of trusts and industries, providing insight into efforts to increase sector inclusivity. It covers the NAMC's Transformation Review Committee (TRC), trust and levy expenditure on transformation over the years, employment equity within the trusts and industries, funded activities, beneficiaries, and impact. Furthermore, the report highlights the efforts of respective industries in aligning their activities with the Agricultural and Agro-Processing Master Plan (AAMP), particularly the Transformation Scheme initiatives as envisaged in Pillar 3.

2. NAMC TRANSFORMATION GUIDELINES

For a long time, transformation funds was spent on skills development and socio-economic activities. The NAMC then introduced the Transformation Guidelines. These guidelines are in alignment with the Marketing of Agricultural Products Act, No. 47 of 1996 (MAP Act), which outlines the process for introducing statutory measures and provides guidance for obtaining approval and gazetting. The Minister of Agriculture approves statutory applications from commodity groups following the NAMC's investigations, coordination, and recommendations. One of the conditions for approval is that 20% of the levies collected should be used to fund transformation interventions in that sub-sector. The NAMC transformation guidelines provide for, among other things, the establishment of the Transformation Review Committee (TRC), which oversees and evaluates the use of the 20% dedicated to transformation. The full document on the NAMC Transformation Guidelines of 2018 is accessible [here](#).

2.1. Transformation Review Committee (TRC)

The TRC reviews transformation business plans submitted with levy applications by administrators and, for industry Trusts, periodically (in line with the NAMC's Transformation Guidelines in Table 1), and provides feedback. Industries approach transformation differently, but their activities and budget allocations must align with the guidelines. The TRC assesses transformation business plans when industries apply to establish or continue statutory levies. Levy administrators must also submit annual transformation plans outlining anticipated activities for the financial year. The TRC reviews, approves, and monitors these plans, evaluating previous transformation performances.

Table 1: Transformation guideline

PILLAR	DESCRIPTION	ALLOCATION
Enterprise Development	<ul style="list-style-type: none"> Fund agribusinesses of black-owned farms for the procurement of production infrastructure, materials, and inputs. For field crops and horticultural products, the industry shall finance soil preparation services. For livestock, the industry shall fund the purchase of vaccinations, dosage programmes, and veterinary services. Fund the costs of accreditation and various legal and professional services (such as Siza or HACCP). The industry shall assist farmers in accessing the market, including facilitating supply agreements or purchase contracts. The industry shall fund the development of business plans. The industry shall explore other funding alternatives to increase the transformation budget (such as CASP, Jobs Fund, and others). Assist in ensuring that appropriate agricultural infrastructure, machinery, and equipment are in place and well-maintained (e.g. electricity and water, bio-security measures, etc.). The industry shall procure materials, inputs, and services from black-owned enterprises and agribusinesses. 	60%
Skills development	<ul style="list-style-type: none"> The industry shall fund training and mentoring for farmers and other production chain actors such as propagators, herders, processing staff, marketers, machine and equipment users, mechanics, and supervisors to develop the capabilities needed to better manage their farms and agribusinesses. Training shall be provided by SETA-accredited skills developers in accordance with the AgriBEE Charter. To ensure these capabilities are developed in the future for managing farms and agribusinesses, the industry shall fund bursaries for Black individuals to acquire such skills. 	18%
Management Control	<ul style="list-style-type: none"> The industry shall fund the position of transformation manager. Only appointments in this capacity from members of Black Designated Groups that promote equity shall be funded. 	17%
Ownership	<ul style="list-style-type: none"> The industry itself, or through alternative funding sources, shall purchase equity in existing enterprises for Black Designated Groups. 	-
Socio-economic Initiatives	<ul style="list-style-type: none"> Industries are encouraged to undertake activities that positively contribute to the quality of life of workers and their communities. 	5%

2.2 Membership of the Transformation Review Committee (TRC)

The membership of the TRC comprises at least one individual from all four operational divisions of the NAMC. It is chaired and deputised by the Senior Managers of the Agricultural Industry Trust and Agribusiness Development Divisions, respectively. Additionally, the NAMC CEO is permitted to attend any meeting of the TRC, depending on availability. Lastly, the committee has co-opted members from the AgriBEE directorate of the Department of Agriculture (DoA).

2.3 Reviewed Industry Transformation Business Plans

During the reporting period, the TRC evaluated and recommended business plans from the following industry bodies:

- Milk South Africa (Milk SA)
- Raisins South Africa (Raisins SA)
- Citrus Grower Association - Grower Development Company (CGA-GDC)
- South African Cultivar and Technology Agency (SACTA)
- South African Olive (SA Olive)
- South African Table Grape Industry (SATI)
- Cape Flora South Africa (Cape Flora SA)

2.4 Monitoring and Evaluation (M&E) through site visits

At any given time of the year, the NAMC arranges with the industry for farm and enterprise visits. These visits form part of the monitoring and evaluation of the activities implemented by the industry, in line with the NAMC transformation guidelines. The monitoring work is aimed at ensuring that what is in the yearly activity-plans are what is happening on the ground. In the 2024/25 period, the following industries and representatives of the Minister were visited:

2.4.1 Ministerial representatives based in Limpopo Province

From 18 to 20 June 2024, the NAMC team visited Limpopo Province-based representatives of the Minister in the Agricultural Trusts and Levy Administration Agencies. The purpose of the visit was to support the Ministerial representatives and obtain feedback on the operations of their respective Trusts and Agencies. The team met with four of the six Ministerial representatives based in Limpopo, as follows:

REPRESENTATIVE	INSTITUTION
Dr Vincent Vacu	SACTA
Dr Fhatuwani Thovhogi	CIT
Dr Dimakatso Mosehla	OPDT
Ms Humbulani Mukhuvha	CIT
Ms Thato Mugonda (Unavailable at the time of the visit)	Sorghum Trust
Dr Hilda Lefophane (Unavailable at the time of the visit)	CIT

2.4.2 Milk South Africa

Milk South Africa (Milk SA) has implemented several transformation initiatives with the primary goal of enhancing competitiveness and increasing the market share of black dairy entrepreneurs within the South African dairy industry¹. The industry’s approach involves setting criteria for beneficiary selection and establishing partnerships with milk buyers to ensure market access. Milk SA also collaborates with experienced livestock brokers and dairy consultants to provide skills development and training to project beneficiaries and their workers.

The transformation expenditure for the financial year 2023/24 is shown in Table 2 below, with Milk SA’s total amounting to R16.2 million, allocated across enterprise development (69%), skills development (5%), socio-economic development (5%), and management control (21%). While four initiatives have ceased operations after receiving support, all 20 beneficiaries remain viable, and the supported projects are sustainable. As of 2024, there were an estimated 882 producers in the industry, with Milk SA supporting 20 smallholder farmers, and its projects contributing 0.07% of the total unprocessed milk to the market.

Table 2: Milk South Africa’s expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT SPENT (R)
Enterprise Development	Monitor existing Milk SA-approved smallholder black dairy commercialisation enterprises.	11 218 894
Skills development	Equip new and existing black dairy entrepreneurs and their workers with essential dairy enterprise and business competencies, including dairy processing, using Milk SA resources and external professionals.	831 119
Management Control	Personnel costs: three staff members.	3 350 187
Socio-economic Initiatives	Assist project beneficiaries in improving accommodation and ablution facilities for their workers.	822 529
TOTAL		16 222 729

Source: Milk SA, 2025

2.4.3 South African Pork Producers Organisation (SAPPO)

From 2 to 4 December 2024, the TRC visited pig farms located in Gauteng (Kwamhlanga and Bronkhorstspuit), Free State (Deneysville), and North-West (Ventersdorp) provinces. These visits were conducted in collaboration with the South African Pork Producers Organisation (SAPPO), which provides a wide range of support to the industry. The purpose of these visits was to assess and understand the impact of SAPPO’s support programmes. Four farms were visited, each with varying sizes of operations, ranging from 20 to 130 sow units. SAPPO provides mentorship, accounting services, and veterinary assistance to the farms. Most farmers we visited indicated that their primary market is the abattoirs, although many acknowledged that the profits generated from it were not substantial.

¹ Currently, there is a huge misunderstanding between members of this industry in respect of its statutory levies and this will have an impact on the transformation

2.4.4 Potato Industry Development Trust (PIDT)

From 29 to 31 October 2024, the NAMC, Potato Industry Development Trust (PIDT), and Potatoes SA conducted oversight visits to various farmers involved in their Enterprise Development programme. These visits took place in the Eastern Cape and KwaZulu-Natal provinces. The aim was to monitor and assess the progress and challenges faced by producers participating in the programme. The farmers who were visited receive support through mentorship, seed provision, and infrastructure funding, which is helping them grow and develop their businesses. However, the visits also highlighted ongoing challenges, including difficulties in expanding operations, accessing financial resources, and managing risks such as market volatility and disease.

2.4.5 Challenges Identified by the TRC

Common challenges highlighted in the transformation projects include the following:

- Access to funding from commercial banks
- Sufficient land for expansion
- Lack of water rights for irrigation
- Inability to use farms as collateral for bank financing
- Lack of coordinated support from the Department of Agriculture

However, there is hope that through the AAMP's two delivery models, namely the Commodity Value Chain Round Tables (VCRTs) and the Production Schemes, the majority of these challenges may be alleviated.

2.5 Industry Transformation Committee Meetings

NAMC TRC members participated in various industry transformation committees to strengthen relationships and guide activities. During the period under review, the TRC attended the following transformation committees:

- Potatoes South Africa (PSA) Transformation Committee
- Raisins South Africa Transformation Committee meeting
- South African Poultry Association (SAPA)
- Transformation Committee meeting
- Mohair Empowerment Trust
- Wool Empowerment Trust (establishment)
- South African Pork Producers Organisation (SAPPO) business development meeting

3. EMPLOYMENT EQUITY AND JOB CREATION BY AGRICULTURAL TRUSTS AND COMMODITY INDUSTRIES DURING THE 2023/24 PERIOD

Table 3 presents the staff composition of commodity industries and trust administrators, which provides a detailed analysis of employees by gender, ethnicity, and age group. The distribution by race is as follows: Asian (4%), Black (33%), White (53%), and Coloured (15%). While commodity industries exhibit a more balanced racial distribution among personnel, trust administrators are more likely to be White, based on the percentages. Age analysis shows that only 8% of employees are youths, while 92% fall into middle-aged or older categories.

Table 3: Staff composition of trust administrators and levy administrators 2023/24

INDUSTRY BODIES	African				Coloured				Indian				White				Total			
	M	F	Y	Σ	M	F	Y	Σ	M	F	Y	Σ	M	F	Y	Σ	M	F	Y	Σ
5/1. Field Crops	4	2	0	6	0	1	0	1	0	0	0	0	7	5	0	12	11	8	0	19
Cotton South Africa	3	2	0	5	0	1	0	1	0	0	0	0	4	3	0	7	7	6	0	13
The South African Cultivar Technology Agency (SACTA)	1	0	0	1	0	0	0	0	0	0	0	0	1	0	0	1	2	0	0	2
The Maize Trust	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
The Sorghum Trust Funding	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Oil and Protein Seeds Development Trust	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	2	1	1	0	2
National Lucerne Trust (NLT)	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	2	1	1	0	2
																0				0
5/2. Livestock	11	16	10	27	2	5	0	7	0	0	0	0	7	15	0	22	20	36	10	56
Milk South Africa (Milk SA)	1	2	1	3	0	2	0	2	0	0	0	0	1	2	0	3	2	6	1	8
South African Pork Producers' Organisation (SAPPO)	5	8	9	13	0	0	0	0	0	0	0	0	2	3	0	5	7	11	9	18
Table eggs industry	2	3	0	5	0	0	0	0	0	0	0	0	1	1	0	2	3	4	0	7
Mohair Trust	2	3	0	5	0	0	0	0	0	0	0	0	2	5	0	7	4	8	0	12
Wool Trust (Cape Wools)	1	0	0	1	2	0	0	2	0	0	0	0	1	1	0	2	4	1	0	5
Meat Industry Trust	0	0	0	0	0	3	0	3	0	0	0	0	0	3	0	3	0	6	0	6
				0				0								0				0
5/3. Horticulture	28	29	1	57	12	22	0	34	2	7	1	9	47	50	11	97	89	108	13	197
Cape Flora South Africa (CFSA)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Citrus Growers Association – Grower Development Company (CGA-GDC)	5	6	0	11	0	0	0	0	0	0	0	0	0	0	0	0	5	6	0	11
Macadamia	1	0	0	1	0	0	0	0	0	1	0	1	4	4	0	8	5	5	0	10
Raisins South Africa	1	2	0	3	3	0	0	3	0	0	0	0	3	4	0	7	7	6	0	13
South Africa Wine (SA Wine)	1	1	0	2	2	7	0	9	0	0	0	0	5	8	0	13	8	16	0	24
South African Table Grape Industry (SATI)	0	1	1	1	1	3	0	4	0	1	1	1	3	3	0	6	4	8	2	12
Pomegranate Association of South Africa (POMASA)	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1	0	1
South African Olive Industry Association	0	0	0	0	0	2	0	2	0	0	0	0	0	0	0	0	0	2	0	2
Citrus Industry Trust (CIT)	7	13	0	20	0	0	0	0	2	4	0	6	8	2	11	10	17	19	11	36
Deciduous Fruit Industry Development Trust (DFIDT)	0	0	0	0	1	0	0	1	0	0	0	0	0	1	0	1	1	1	0	2
Potato Industry Development Trust (PIDT)	7	5	0	12	0	1	0	1	0	0	0	0	10	6	0	16	17	12	0	29
Hortgro	6	0	0	6	5	9	0	14	0	1	0	1	9	20	0	29	20	30	0	50
Pecan Nuts	0	1	0	1	0	0	0	0	0	0	0	0	5	1	0	6	5	2	0	7
TOTAL	43	47	11	90	14	28	0	42	2	7	1	9	61	70	11	131	120	152	23	272
PERCENTAGES	33%				15%				3%				48%				44%	56%	8%	100%

Source: Industry Information, 2025

4. AGRICULTURAL TRUST AND LEVY INCOME/EXPENDITURE ON TRANSFORMATION FOR 2023/24

Table 4: Agricultural trust and levy expenditure on transformation

INDUSTRY BODIES	PILLARS					TOTAL
	Enterprise Development	Skills Development	Management Control	Ownership	Socio-Economic Initiatives	
5/1. Field Crops	49 726 075	22 877 763	5 097 840	14 200	3 514 875	81 230 753
Cotton South Africa	118 000	1 100 000	8 500	14 200	99 045	1 339 745
The South African Cultivar Technology Agency (SACTA)	43 467 411	9 012 850	4 696 345	-	2 211 990	59 388 596
The Maize Trust	3 595 869	5 205 578	-	-	1 198 500	9 999 947
The Sorghum Trust Funding	-	-	-	-	-	-
Oil and Protein Seeds Development Trust	2 084 773	7 538 945	392 995	-	-	10 016 713
National Lucerne Trust (NLT)	460 022	20 390	-	-	5 340	485 752
						-
5/2. Livestock	38 324 209	14 054 553	15 386 486	-	1 252 571	69 017 819
Milk South Africa (Milk SA)	11 218 894	831 119	3 350 187	-	822 529	16 222 729
South African Pork Producers' Organisation (SAPPO)	5 086 301	2 589 993	11 716 299	-	-	19 392 593
Table eggs industry	2 600 000					2 600 000
Mohair Trust	17 419 014	1 073 934	-	-	315 042	18 807 990
Wool Trust (Cape Wools)	-	9 277 507	-	-	115 000	9 392 507
Meat Industry Trust	2 000 000	282 000	320 000	-	-	2 602 000
						-
5/3. Horticulture	85 811 429	16 860 652	8 985 854	110 880	4 987 899	116 756 714
Cape Flora South Africa (CFSA)	192 000	75 000	-	-	-	267 000
Citrus Growers Association – Grower Development Company (CGA-GDC)	37 000 000	-	-	-	-	37 000 000
Macadamia	3 624 096	1 988 014	646 182,88	-	344 445	6 602 737
Raisins South Africa	2 269 488,21	845 186,31	1 959 185,07	-	326 887,15	5 400 747
South Africa Wine (SA Wine)	15 662 895	3 738 282,00	4 310 641,00	-	3738 282,00	27 450 100
South African Table Grape Industry (SATI)	7 118 300,00	1 398 414	1 911 036		151 594	10 579 344
Pomegranate Association of South Africa (POMASA)	68871,39	-	-	-	-	68 871
South African Olive Industry Association	221 238	163 148	-	-	15 811	400 197
Citrus Industry Trust (CIT) (Support GDC and Citrus Academy)	350 000	350 000	-	-	-	700 000
Deciduous Fruit Industry Development Trust (DFIDT)	-	1 000 000	-	-	-	1 000 000
Potato Industry Development Trust (PIDT)	5 500 000	1 200 271	-	-	-	6 700 271
Hortgro	11 541 620	5 450 000	-	-	300 000	17 291 620
Pecan Nuts	2 262 921	652 337	158 809	110 880	110 880	3 295 827
TOTAL	173 861 713	53 792 968	29 470 180	125 080	9755345	267 005 286

Source: Industry Information, 2025

Table 4 shows that during the 2023/24 financial year, Trusts and levy administration spent more than R267 million on transformation initiatives. Trusts contributed R73.5 million, while levy administrators provided R193.4 million. Of the total expenditure, 85% was allocated to enterprise and skills development, amounting to R173.9 million and R53.7 million, respectively. In addition, R29 million went to management control, while R9.8 million and R125 080 were directed to socio-economic initiatives and ownership categories, respectively. These expenditures align with the recommendations of the NAMC Generic Guidelines. Compared with the previous period, spending on transformation rose by R67 million, from R260.3 million in 2022/23 to R267 million in 2023/24. The increase is mainly attributed to the Trusts’ relatively weaker financial performance during the review period compared with 2022/23.

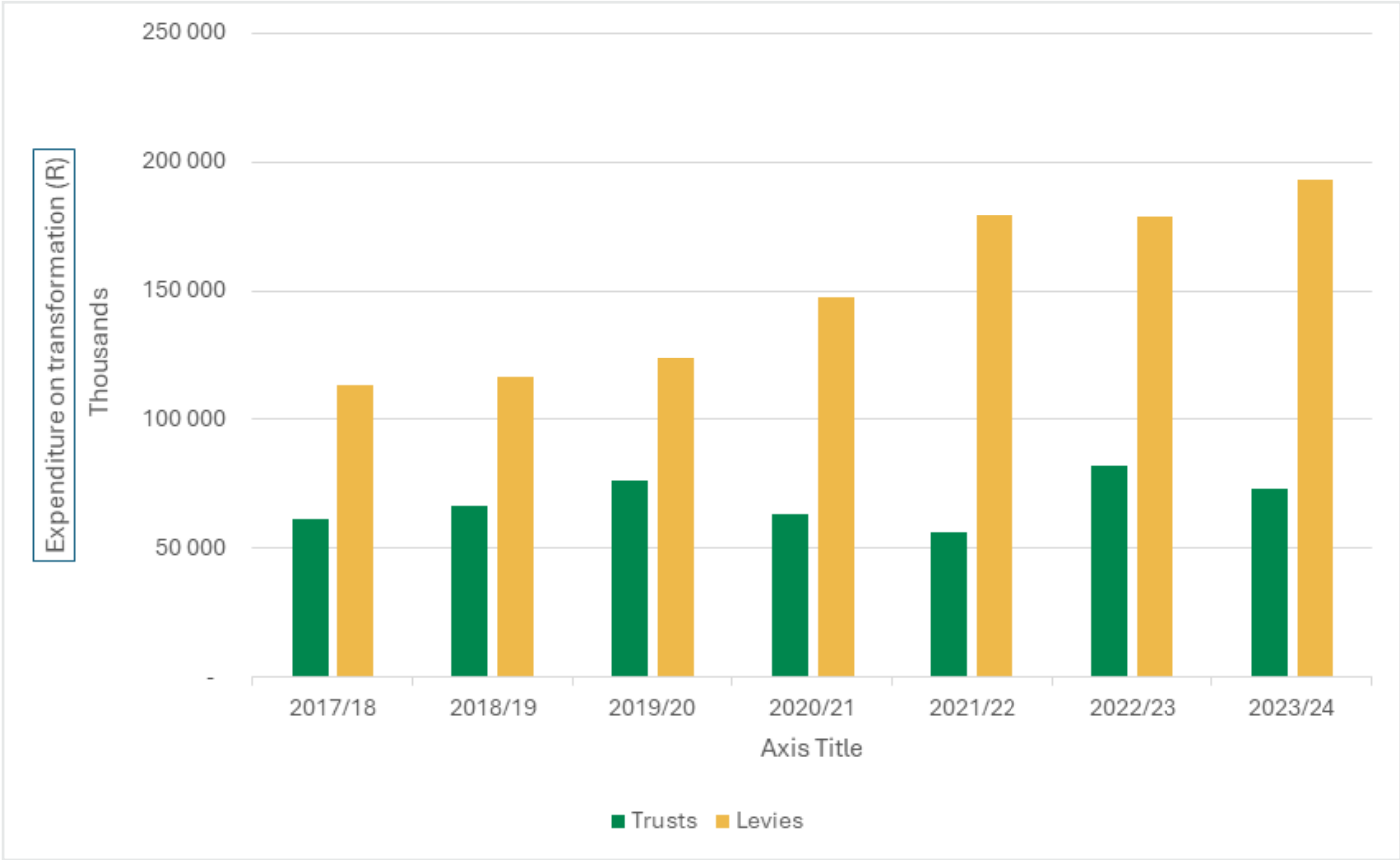


Figure 1: Agricultural trust and levy expenditure on transformation over the years (2017/18 to 2023/24)
Source: NAMC’s calculations, 2025

5. TRANSFORMATION INITIATIVES

5.1. Field crops

5.1.1. Cotton South Africa

Cotton South Africa (Cotton SA) was formed in 1998 to represent all role-players in the cotton value chain. It provides public-facing infrastructure that supports the industry, raises awareness of critical issues, supplies information for decision-making, and promotes cooperation on shared interests. Cotton SA also serves as an industry forum and advises government departments. It applies statutory measures under the Marketing of Agricultural Products Act and administers them accordingly. Cotton SA allocates 20% of levy income to transformation. The funds support skills and training; mentorship and enterprise development; and management control inputs that promote ownership—for example, the Ubongwa ginnery in Makhathini. The organisation also advances sustainable production by monitoring and supporting industry standards, with a focus on transforming black smallholder farming in South Africa.

Cotton SA's initiatives include three flagship projects—in the Nkomazi region, Makhathini, and the Nokaneng/Matlerekeng areas—plus several smaller projects nationwide. In 2023/24, Cotton SA spent R1 339 745 on transformation. Allocations were: R118 000 for enterprise development (with a focus on co-operative governance); R1 100 000 for skills development; R8 500 for management control related to project management; R14 200 for ownership as part of establishing a new ginnery; and R99 045 for socio-economic development initiatives.

Table 5: Cotton SA's expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT SPENT (R)
Enterprise development	Co-operative governance	118 000
Skills development	Training	1 100 000
Management control	Project management	8 500
Ownership	New gin	14 200
Socio-economic development	BCI	99 045
Total		1 339 745

Source: Cotton SA, 2025

Participation of black farmers in cotton production: To drive transformation, Cotton SA has developed a national strategy involving seven gins across South Africa to ensure that black producers account for at least 20% of the national crop by 2030.

South Africa has approximately 2 106 cotton producers: 2 062 smallholders (predominantly black) and 44 commercial producers (predominantly white). White commercial producers currently control 91–92% of the market, while black smallholders account for only 8–9%.

5.1.2. The South African Cultivar Technology Agency (SACTA)

The South African Cultivar and Technology Agency (SACTA) was established to manage breeding levies for self-pollinated grain and oilseed crops, including wheat, barley, oats, soybeans, and lupins. In the 2023/24 financial year, SACTA invested R61 million in transformation initiatives.

Table 6: SACTA's expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT SPENT (R)
Enterprise development		43 467 411
Skills development		9 012 850
Management control		4 696 345
Ownership		-
Socio-economic development		2 211 990
Total		59 388 596

Source: SACTA, 2025

Table above outlines the total spending on transformation for the reporting period, which reflects SACTA's strong commitment. It is worth noting that, for the first time, SACTA has recovered loans whose terms had expired. While some losses were incurred, the overall benefits outweighed the losses, providing valuable lessons. These losses primarily resulted from unfavourable climatic conditions that impacted farmers' profitability. Despite these challenges, farmers remain dedicated to repaying their loans, ensuring a continued and productive relationship.

5.1.3. The Maize Trust

The Maize Trust funds industry bodies to implement research, market information, and transformation activities in the maize industry. The maize industry does not collect a levy and funds its work, including these activities, from its investments. During the year under review, R19 million was allocated towards transformation initiatives, channelled into programmes supporting new black commercial maize farmers. Its support is limited to three areas: soil correction, insurance, and mentorship. During the year under review, its funding for such initiatives was channelled through Grain SA's development arm, Phahama Grain Phakama NPC (PGP), and TWK.

The Trust continues to fund bursaries targeting MSc and PhD students to stimulate studies in maize-related fields and create skilled capacity within South African agriculture. It also supports Grain SA's Pula Imvula Magazine, aimed at developing farmers, and its national school programme to inform learners from previously disadvantaged communities about agricultural careers and the value of agricultural pursuits.

Table 7: Maize Trust's expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT SPENT (R)
Enterprise development	Mentorship, lime and insurance	3 595 869
Skills development	Study groups, training and publications	5 205 578
Management control	-	-
Ownership	-	-
Socio-economic development	Bursaries	598 500
	Schools programme	600 000
Total		9 999 947

Source: Maize Trust, 2025

Table 7 above summarises the amount spent on different pillars of the NAMC's transformation guideline. About R3.6 million was spent on enterprise development, while R5.2 million and R1 198 500 went to skills development and socio-economic activities, respectively. The Maize Trust withheld R10 million in spending for transformation in the 2023/24 financial year due to technical issues with one of the service providers. However, the funding has been ring-fenced for expenditure in the next financial year. Accordingly, transformation spending through the Maize Trust is expected to spike in the 2024/25 financial year.

5.1.4. The Sorghum Trust Funding

In the past, the Trust has been able to provide funding for several programmes to create new black commercial sorghum farmers using the NAMC's transformation guidelines. However, during the period under review, the Sorghum Trust is facing challenges in identifying reliable transformation initiatives and service providers due to a decline in sorghum production and tight profit margins. This situation is attributed to, among other factors, the VAT on sorghum.

The Sorghum Trust has since established the Sorghum Cluster Initiative (SCI) to stimulate the demand for sorghum and incentivise farmers to produce more. The SCI achieves this by driving industry-wide awareness among consumers, producers, and processors. This initiative is poised to strengthen the industry's role in future transformation projects.

A key milestone in broadening the Sorghum Trust's transformation footprint is a groundbreaking research project managed by the University of the Free State, supported by external funders. This project is expanding opportunities for sustainable growth and innovation within the sector.

Additionally, the Sorghum Cluster Initiative's Awareness Campaign has launched a specially curated recipe book designed to empower households with simple, cost-effective ideas that promote sorghum consumption. By fostering greater demand and accessibility, this initiative is setting the stage for a resilient and inclusive sorghum industry.

5.1.5. Oil and Protein Seeds Development Trust

The Oil and Protein Seeds Development Trust (OPDT) was established in 1997 to develop and promote the South African oilseeds industry. The primary commodities of this industry are sunflowers, soybeans, groundnuts, and canola. In terms of transformation, the OPDT focuses on training, mentorship, insurance, information supply, demonstration trials, enterprise development, community upliftment, input finance for smallholder farmers, bursaries, and technology transfer.

Table 8: OPDT's expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT SPENT (R)
Enterprise development	Support Grain SA farmers	R 2 084 773
Skills development	Training for soya beans	R 7 538 945
Management control	Develop an M&E system	R 392 995
Ownership	-	-
Socio-economic development	-	-
Total		R 10 016 713

Source: OPDT (2025)

5.1.6. National Lucerne Trust (NLT)

The National Lucerne Trust (NLT) was established in 1996 under the Marketing of Agricultural Products (MAP) Act no. 47. NLT is a successor to the Lucerne Seed Board, the governing body of the South African lucerne seed industry. Today, the NLT represents lucerne seed producers, cleaners, traders, and importers, as well as the processors and exporters of lucerne hay.

The Trust's transformation goal is to assist aspiring farmers and agribusiness owners in advancing from subsistence to commercial farming systems. As outlined in Table 9, during the year under review, the NLT spent R485 752 on transformation initiatives. The NLT provided R460 022 to support the Smallholder and Agripreneur Development Project. This funding was used for purchasing seeds and conducting quality analysis during the review period. Additionally, R20 390 was allocated for skills development related to lucerne hay grading, while R5 340 was set aside for socio-economic activities.

Table 9: NLT's expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT SPENT (R)
Enterprise development	Seeds and quality analysis	460 022
Skills development	Lucerne Hay Grading Course	20 390
Management control	-	-
Ownership	-	-
Socio-economic development	Support schools	5 340
Total		485 752

Source: NLT, 2025

5.2. Livestock

5.2.1. Milk South Africa (Milk SA)

Milk South Africa (Milk SA) has implemented several transformation initiatives with the primary goal of enhancing competitiveness and increasing the market share of black dairy entrepreneurs within the South African dairy industry. The industry's approach involves setting criteria for beneficiary selection and establishing partnerships with milk buyers to ensure market access. Milk SA also collaborates with experienced livestock brokers and dairy consultants to provide skills development and training to project beneficiaries and their workers.

In the 2023/24 financial year, Milk SA supported twenty (20) black dairy enterprises in harvesting a collective 78 hectares (ranging from 7 hectares to 30 hectares per farmer) of maize to make silage, along with 966 tonnes of lucerne and 628 tonnes of meal concentrates. Furthermore, Milk SA supported two (2) beneficiaries with solar power system installations and one (1) farmer with a 2 400-litre capacity milk tank. This support is generally provided on a 25%:75% cost-sharing basis, where a farmer pays 25% while Milk SA is responsible for the remaining 75% of the cost.

The transformation expenditure for the financial year 2023/24 is detailed in Table 10 below, with total transformation by Milk SA amounting to R16.2 million, allocated across enterprise development (69%), skills development (5%), socio-economic development (5%), and management control (21%). While four projects have ceased operations after receiving support, all 20 beneficiaries remain viable, and the supported projects are sustainable. As of 2024, there were an estimated 882 producers in the industry, with Milk SA supporting 20 smallholder farmers, and Milk SA projects contributing 0.07% of the total unprocessed milk to the market.

Table 10: Milk South Africa's expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT SPENT (R)
Enterprise development	Monitor existing Milk SA-approved smallholder black dairy commercialisation enterprises.	11 218 894
Skills development	Capacitate new and existing black dairy entrepreneurs and their workers in essential dairy enterprise/business competencies, including dairy processing, using Milk SA resources and external professionals.	831 119
Management Control	Personnel costs: three staff members.	3 350 187
Socio-economic Initiatives	Assist project beneficiaries in improving accommodation and sanitation facilities for their workers.	822 529
Total		16 222 729

Source: Milk SA, 2025

5.2.2. South African Pork Producers' Organisation (SAPPO)

The South African Pork Producers Organisation (SAPPO) undertakes transformation initiatives according to the National Agricultural Marketing Council (NAMC) generic guidelines. These programmes aim to foster inclusive growth within the pig industry, supported by a documented transformation strategy. SAPPO supports 71 initiatives and projects through mentorship and veterinary services, with additional accounting provided to two farms.

While there were no newly commercialised projects in 2024, continued support was given to previously developed farms. SAPPO employs an in-house developed application to monitor progress on farms, track production data, disease outbreaks, and abattoir information. It also focuses on skills development through their Academy, bursaries, educational materials, and farmer days.

5.2.3. Table Eggs Industry

The Table Eggs Industry is one of the two divisions of the South African Poultry Association (SAPA), which is responsible for this segment. SAPA recognises transformation as a top priority due to the industry's dualistic nature and the broader agricultural sector. Collaboration between industry and government is essential for achieving tangible results. During the period under review, the Table Eggs Industry directed R2.6 million—drawn from the statutory levies' 20% transformation allocation—to three projects, as follows:

- West Rand Aggregation Pack Station: R1.5 million
- Zappa Poultry: R600 000 for buying feed and chickens
- Fort Cox College: R500 000 for the renovation of poultry houses

The West Rand Aggregation Pack is an inspirational agricultural initiative. Four farmers established a packhouse to support emerging producers in the West Rand District Municipality and surrounding areas by aggregating supply and linking them to formal markets (see Section 6.4).

5.2.4. Mohair Trust

The Mohair Trust drives transformation efforts through the Mohair Empowerment Trust (MET), established in 2010 with a focus on providing resources to emerging farmers. During the review period, the Trust allocated R3 702 376 for transformation, mainly to provide goats to emerging farmers with land access (R2 172 225) and to offer mentoring and training (R1 530 151). Approximately 1 200 farmers participate in the market.

Despite these efforts, the MET faces challenges such as cash flow constraints for new projects, land ownership issues that affect farmers' willingness to invest, and limited resources for programme expansion. The Trust aims each year to empower at least one emerging farmer to achieve commercial status as a mohair producer. The industry is heavily export-oriented, with over 90% of the fibre shipped abroad and 84% of South African mohair sustainably certified.

5.2.5. Wool Trust and Cape Wools SA

The Wool Trust Transformation projects are aimed at transitioning smallholder wool producers into commercial operations and integrating black, small-scale, and communal farmers into the wool industry. The primary

focus of the Trust's transformation actions is on:

- organising small-scale communal wool sheep producers into Wool Grower groups and assisting them in collectively harvesting, classing, and packing wool to access the commercial market;
- developing infrastructure (i.e. wool-harvesting facilities) in partnership with the government and other stakeholders, including the private sector;
- implementing genetic improvements to enhance the quality and quantity of wool produced by black small-scale and emerging farmers;
- awarding bursaries to previously disadvantaged individuals; and
- creating jobs through shearer training.

Table 11 shows a summary of the focus areas of the Trust's funding for transformation initiatives during the 2023/24 financial year.

Table 11: Wool Trust's expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT SPENT (R)
Skills development	Skills development and Training	5 678 688
	Job creation (Shearer training)	
Socio-economic Initiatives	Bursaries	3 598 819
Total		9 277 507

Source: Wool Trust, 2025

5.2.6. Meat Industry Trust

The Meat Industry Trust (MIT) is dedicated to enabling transformation within South Africa's red meat industry. In the reporting period, the Trust spent R2 million on related activities, primarily focused on funding four emerging farmers. These initiatives aim to enhance infrastructure, improve livestock management, and supply essential production inputs. Geju Holding has been selected as the service provider, responsible for implementing the project, offering mentorship, and providing training services to the farmers.

MIT's efforts to transform the sector have already yielded positive results. A survey of participating farmers revealed significant impacts, including enhanced farm security and professionalisation. One farmer stated, "The grant changed my life and my business... We revamped our kraal and added additional stock. We are now professional farmers." Another farmer reported that the grant positively impacted their livestock, enabling them to participate in workshops that improved their farming practices and marketing skills.

Looking ahead, MIT has approved a new budget of R3 million for transformation in 2025, demonstrating a continued commitment to addressing socio-economic challenges within the industry. The Trust identifies and supports eligible candidates through specific criteria, with ongoing evaluation and verification processes managed by the implementing agent. These projects aim to mitigate issues such as poverty, unemployment, and inequality, fostering sustainable development and growth within the red meat sector.

5.3. Horticulture

5.3.1. Cape Flora South Africa (CFSA)

Cape Flora does not have a transformation manager due to the small size of the industry and the association’s limited resources. However, it shares resources with industry associations, such as Hortgro, through a secondment agreement. Despite financial constraints, transformation remains a key focus, with CFSA adopting a partnership-based approach to support the development needs of black producers. With a limited budget, CFSA aims to leverage its industry expertise to create opportunities for black producers, including wild harvesters. CFSA spent R268 000 on transformation during the 2023/24 period, supporting 29 beneficiaries. Enterprise development: Of the total transformation expenditure, R192 000 was invested in this pillar, benefiting 10 beneficiaries from 5 entities. CFSA supported three projects in acquiring inputs and receiving technical advice. Four people were sponsored to visit the flower value chain in Amsterdam for a trade study tour. In the Skills development pillar, Cape Flora SA allocated R75 000 to conduct export readiness training, an advanced production course, and provide mentorship.

Commercialisation and sustainability: About eight different entities have been supported in the past 5 years at varying stages of growth and remain part of ongoing support. The two most recent successes are Iqhude Farming, which already cultivates 5 hectares that produce market-ready Cape Flora, and the cultivation of other crops. 34 Degrees South has recently been selected to participate in a programme run by the German Import Promotion Desk to develop trade between South Africa and Germany.

Black farmers’ participation in Cape Flora production: According to Cape Flora South Africa, there are 92 Cape Flora producers in the country. Five smallholder farmers, primarily black, are involved in two BEE projects, while 92 commercial farmers, mostly white, make up the country’s producers.

5.3.2. Citrus Growers Association – Grower Development Company (CGA-GDC)

The Growers Development Company adopts a holistic approach to transformation, considering both internal and external factors. Externally, they engage with suppliers and prioritise diversifying the supply chain by supporting small businesses and black-owned farms. As shown in Table 12, CGA-GDC invested R37 million in transformation initiatives in the 2023/24 financial year.

Table 12: CGA-GDC’s expenditure on transformation, 2023/24

PILLAR	ACTIVITIES	AMOUNT (R)
Enterprise development	Enterprise development Supporting emerging growers with integrated pest management (IPM), electricity, diesel, packing materials, compliance, and tree planting.	37 000 000
Total		37 000 000

Source: CGA-GDC, 2025

Enterprise development: CGA-GDC allocated R37 million to support black-owned citrus enterprises during the 2023/24 financial year. The citrus industry allocated resources to address some challenges through Enterprise Development funding. This allocation covered various needs, including production support, integrated pest management (IPM), electricity, diesel, packing materials, compliance, and tree planting. The main objective of the fund is to create an enabling environment that supports majority black-owned enterprises in enhancing their productivity and competitiveness. The significant challenges faced by these enterprises include financial uncertainty arising from high input costs, price fluctuations, and stringent market requirements.

Black farmers’ participation in CGA-GDC: In the CGA-GDC industry, around 113 producers operate, all of whom are BEE projects. A market share analysis reveals that commercial farmers hold a 40% share, while smallholder farmers account for 60%.

5.3.3. Macadamia

Macadamia South Africa (SAMAC) takes a farmer-centric approach to transformation, striving to create a macadamia nut industry that reflects South Africa’s diversity, promotes economic empowerment, and achieves sustainable development. SAMAC forms strategic partnerships across sectors and institutions to enhance the industry’s value. The organisation develops comprehensive solutions to support small-scale farmers throughout the value chain, enabling them to progress towards commercialisation. Through targeted initiatives, continuous improvement, and collaborations, SAMAC aims to create a future where South Africa’s macadamia nut industry serves as a model of transformation and success. As shown in Table 13, SAMAC allocated funds towards various transformation initiatives in the 2023/24 financial year, categorised into four pillars: enterprise development, skills development, management control, and socio-economic development. SAMAC spent R6.59 million on transformation activities during the 2023/24 financial year.

Table 13: SAMAC’s expenditure on transformation, 2023/24

PILLAR	ACTIVITIES	AMOUNT SPENT (RANDS)
Enterprise development	Capital investments in trees, land preparation, irrigation, and water infrastructure.	3 624 095
Skills development	Training for emerging farmers, covering macadamia phenology, Global GAP, audits in partnership with TFSA, and learnerships.	1 988 013
Management control	Management and oversight expenses related to the transformation process.	646 182
Socio-economic development	Construction of a school kitchen to prepare meals using food sponsored by the community, and building bathroom facilities and sports fields for school children.	344 444
Total		6 592 736

Source: SAMAC, 2025

Enterprise Development: SAMAC invested R3.6 million in capital projects to enhance the macadamia industry’s infrastructure and operational capacity. The funds were used to acquire vehicles and machinery, establish processing facilities, and prepare land. These investments were made across multiple provinces, including KwaZulu-Natal, Limpopo, and Mpumalanga, focusing on boosting production efficiency and supporting macadamia farmers.

Skills Development: SAMAC prioritised skills development, investing R1.98 million in programmes empowering emerging farmers and agricultural students. This investment included training in macadamia phenology, as well as theoretical and practical learnerships, and Global GAP certification. Implemented across Limpopo, Mpumalanga, and KwaZulu-Natal, these initiatives aimed to enhance the knowledge and skills of those involved in macadamia farming.

Management Control: SAMAC allocated R646 182 to manage and oversee transformation, demonstrating its commitment to effective governance and strategic oversight. This investment ensures the success and sustainability of transformation initiatives across regions.

Socio-Economic Development: SAMAC dedicated R334 444 to community development projects, thereby enhancing the socio-economic well-being of local communities. The initiatives included the construction of school kitchen facilities, bathroom facilities, and sports fields for children. Implemented in provinces such as KwaZulu-Natal and Limpopo, these projects uplifted communities and improved the quality of life for residents.

The participation of black farmers in the macadamia industry: Black farmers’ participation in the macadamia industry is crucial for its transformation. Among 1 371 producers, 415 are smallholder farmers (predominantly black), 10 of whom are part of BEE projects. The remaining 956 are commercial farmers (predominantly white). However, the smallholder farmers’ market share is low at 4%, compared with the significantly larger share of commercial farmers at 96%. Efforts are underway to address this gap by securing match funding from government and private partners. These initiatives aim to provide smallholder farmers with the necessary resources and support to increase their market share, promoting inclusivity, economic empowerment, and equity in the macadamia industry.

5.3.4. Raisins South Africa

Raisins South Africa aims to empower growers to achieve sustainability and success through its transformation mandate. The industry supports black businesses in becoming sustainable commercial operations via enterprise development, skills development, and socio-economic initiatives. During the review period, Raisins SA invested R3.4 million towards transformation efforts. Table 14 below summarises the transformation allocation budget by Raisins SA.

Table 14: Raisins’s expenditure on transformation, 2023/24

PILLAR	ACTIVITIES	AMOUNT (R)
Enterprise development		2 269 488.21
Skills development		845 186.31
Management control		1 959 185.07
Socio-economic activities		326 887.15
Total		5 400 746.74

Source: Raisins SA, 2025

5.3.5. South Africa Wine (SA Wine)

SA Wine, as the umbrella organisation representing the South African wine industry, has adopted a comprehensive transformation strategy to empower black-owned brands and vineyard growers. This approach is driven by the vision of an inclusive, equitable, and sustainable wine sector, ensuring meaningful participation across the value chain. The transformation agenda is reflected in SA Wine’s board, which enables fair and representative decision-making. SA Wine’s strategy is multifaceted, covering areas such as grant funding, production support, agribusiness, corporate governance training, ethical trade practices, and workforce development.

Table 15: SA Wine's expenditure on transformation, 2023/24

PILLAR	ACTIVITIES	AMOUNT (R)
Enterprise development	Black farmer support (vineyards), Black brand support, Wine Arc, Industry Advisory, Ethical	12 286 351
Skills development	Pinotage Youth Development Academy, Wine Online Training, Business School Masterclass, Graduate Business School, Production Leadership Course, Wine Training, Cape Winemakers Guild, Labour Union Training	3 738 282
Socioeconomic Development (SED)		4 310 641
Total		20 335 274

Source: SA wine, 2025

Enterprise development

In 2024, SA Wine supported black-owned enterprises to the tune of R12.3 million. This funding facilitated marketing, packaging, promotion, infrastructure development, and key operational support for 20 black-owned brands and 9 farms. The Wine Arc Business Incubator, a flagship public-private partnership supported by SA Wine, hosted 13 black-owned brands, providing incubation services, leadership mentorship, and tailored market access initiatives that led to significant sales growth---up to 80% growth reported by some participants. Infrastructure development saw the initiation of three new black-owned wine cellars, including one currently under construction, marking significant progress toward sustainable ownership. Additionally, collaboration through Hortfin enabled financing solutions specifically targeting emerging black farmers, loans approved totalling R464 million since 2018, including R33 million allocated to wine grape projects.

Skills development

SA Wine allocated over R3.7 million towards people development in 2024. The funding supported training and skills initiatives designed to build an inclusive workforce of over 2 200 learners by year-end, a 29% increase from the previous year. Key programmes included bursaries (10 awarded out of 62 applications), graduate placements, and specialised training such as the Cellar Worker Programme (225 participants) and Senior Leader Development for black-owned brands. The launch and rapid growth of the South African Wine Industry Professional Body (SAWIPB) in late 2024 further solidified the industry's commitment, including professionalisation, standards setting, and continuous professional development. SA Wine also supported companies with mandatory grant applications, enabling access to 20% Skills Development Levies from SETAs, while expanding an accredited training catalogue to 170 programmes.

5.3.6. South African Table Grape Industry (SATI)

SATI aims to create equal opportunities and support for black agriculturists and entrepreneurs to participate as owners, co-owners, managers, and professionals, and to share in the benefits the industry has to offer. SATI's transformation strategy aligns with the Fruit SA Sector Plan, and it actively supports Broad-Based Black Economic Empowerment (BBBEE) initiatives in grape farming areas with established bulk infrastructure and the necessary support services available. SATI supported nine BBBEE initiatives during the 2023/24 financial year and assisted eight young black students in attending an academic institution. It allocated approximately 22% of its levy income to transformation initiatives in the 2023/24 financial year.

Table 16: SATI's expenditure on transformation, 2023/24

PILLAR	SPECIFIC ACTIVITIES FUNDED	AMOUNT (R)
Enterprise development	Vineyard development programme	4 909 876
	Help desk and advisory services/CPAC sittings assessments	661 480
	Hortfin	1 546 944
Skills development	Bursaries	692 681
	Modular courses and other on-farm or leadership short courses	705 733
Management control	Black representation (senior managers) and overheads	1 911 036
Socio-economic development	Agri Got Talent/Farm worker development programme	151 594
Total		10 579 344

Source: SATI, 2025

Enterprise development: SATI invested R4.9 million in the Vineyard Development Programme, supporting farmers in revitalising and expanding their vineyards to enhance yields, quality, and crop protection. In addition, R661 480 was allocated to helpdesk and advisory services, providing essential support to farmers in areas such as compliance management and marketing. The Hortfin programme received R1 546 944, providing financial assistance to black-owned businesses in the industry. To date, this initiative has given farmers access to loan funding exceeding R80 million.

Skills development: SATI also invested R692 681 in bursaries for black students pursuing higher education in agriculture, aiming to develop a skilled workforce and promote industry inclusivity. Furthermore, R705 733 was spent on modular courses and leadership short courses, upskilling farmers and workers involved in BBBEE initiatives. Additionally, R151 594 was invested in subsidising participation in the International Table Grape Symposium, offering valuable learning opportunities, direct networking with stakeholders from the global table grape industry, and firsthand access to research outcomes that impact on-farm decisions.

Management control/Ownership: A substantial portion of the expenditure, totalling R1.9 million, was dedicated to promoting black representation in senior management positions, project management, and overheads. This funding includes support for the Transformation Manager role, which is responsible for addressing stakeholder challenges through decision-making and recommendations.

Socio-economic development: Under Socio-economic development, SATI invested R151 594 in initiatives focusing on community upliftment and farm worker well-being. These initiatives included support for the Agri Got Talent/Farmer Worker Development programme, which empowers participants with valuable skills through training workshops and prizes.

5.3.7. Pomegranate Association of South Africa (POMASA)

The pomegranate industry is small and heavily export-oriented, as the local market is insufficient. The industry aims to expand and supports producers of other crops wishing to diversify their operations. Although the industry is too small for a dedicated transformation team, transformation remains a priority, with a portfolio at board level. The transformation strategy focuses on enterprise development, business support, market readiness and access (compliance with market standards), technical assistance, network-building for primary producers, and engagement with government departments. POMASA supports the Mitrock Pomegranate project, rehabilitating 12 hectares of pomegranate orchards. During the reporting period, POMASA invested R68 871.39 in transformation initiatives. POMASA's assistance aims to help these growers become commercially viable over time.

5.3.8. South African Olive Industry Association

The South African Olive Industry Association (SA Olive) fully supports transformation; however, resources for enterprise development, skills development, and ownership are limited and must be supplemented to achieve significant impact. As SA Olive cannot fund land or infrastructure, it facilitates transformation through technical advice, business support (e.g., business planning, starter packs), knowledge transfer, mentorship, networking, and exposure opportunities. The industry focuses on assisting new entrants who are not growers in establishing and marketing their olive-product brands locally and internationally. SA Olive collaborates with other organisations and institutions to amplify impact and leverage available resources.

During the review period, SA Olive invested R1 367 917.84 in transformation initiatives. Of this amount, R821 507 was allocated to enterprise development, while R246 452 supported skills development for industry stakeholders. Management control received R232 760 to implement robust governance and operational frameworks within olive enterprises. Additionally, R68 458 was allocated to socio-economic development initiatives.

In the pome and stone fruit industry, 200 producers operate, of whom 198 are commercial farmers, predominantly white. Additionally, two BEE projects focus on empowerment within the industry. Commercial farmers hold the entire market share. To increase the market share of smallholder farmers, SA Olive supports new entrants downstream in the value chain. This assistance enables them to pursue brand development and promotion, and potentially to integrate upstream by acquiring land and growing olives in the future. Newcomers to olive farming may face challenges.

5.3.9. Citrus Industry Trust (CIT)

The Trust's beneficiaries within the citrus industry are the Citrus Academy (CA) and the Citrus Growers' Association – Grower Development Company (CGA-GDC), focusing on skills development and enterprise development, respectively. The Trust is committed to transformation through the active participation of black-designated groups in the citrus value chain. During the review period, the Trust spent approximately R350 000 on enterprise development and awarded bursaries totalling R350 000.

5.3.10. Deciduous Fruit Industry Development Trust (DFIDT)

The Trust is not responsible for implementing transformation projects itself. The Trust requests proposals from the sector, evaluates them, and awards funding to projects that best meet its objectives. In the past, the Trust provided funding for human capital development, including bursaries. More recently, the Trust funded a feasibility study on reviving deciduous fruit farms in the Free State Province for economic development. The current project focuses on capacity building. The trustees evaluate current conditions and determine where the greatest impact can be made with available funds. To date, the Trust has disbursed R500 000 each to Hortgro and PALS for capacity building in three areas. The first two are (i) business coaching for existing pome and stone fruit emerging producers and (ii) business-plan development support for both new entrants and established operations. The third (iii) is graduate and internship placement, which aims to enhance the employability of interns and graduates in the sector.

5.3.11. Potato Industry Development Trust (PIDT)

The Trust is not itself responsible for implementing transformation. Potatoes South Africa (PSA) is the Trust's implementing agency, carrying out all activities on its behalf. At least 20% of statutory levies are invested in transformation, guided by NAMC's transformation guidelines. The Developing Producers Committee is responsible for nominating representatives to the Potatoes South Africa Transformation Committee and identifying needs, challenges, and opportunities for emerging Black commercial producers. In the 2023/24 financial year, the Trust spent R12.3 million on transformation initiatives.

Enterprise Development Programme: Develops Black farmers to grow and produce potatoes commercially in a sustainable way. In the 2023/24 financial year, 21 enterprise development farmers were supported. PSA has collaborated with the Limpopo and Western Cape Departments of Agriculture, Kagiso Trust, Afgri, VKB, and others. PSA provides support through seed purchase, mentorship, pre-feasibility studies, and business plans for New Era farmers. Seed is supplied on a four-year 25% sliding scale to ensure that farmers can stand on their own and run a sustainable venture at the end of the support period. Approximately R5.5 million was spent on enterprise development.

Small Grower Development Programme: A subsistence farming project aimed at communities, focusing on food security, rural development, and job creation, reached over 600 community members, with an average of 50 participants per project. Communities were trained in potato cultivation, enhancing collaboration with provincial stakeholders and improving food security and household incomes. Demonstrations covered potato planting, fertiliser, and chemical application. Over 40 projects were supported in Mpumalanga, Limpopo, Gauteng, KwaZulu-Natal, the Eastern Cape, and the Western Cape, with a total expenditure of R218 576.

Skills development: PSA continues to provide skills development programmes for enterprise development farmers, ensuring they can make sound business decisions. A skills audit identified gaps in skills; consequently, all enterprise development farmers receive training in financial management. The programme aims to expose students to the potato industry, enabling them to make informed career choices based on their experience. Over the past 14 years, the programme has provided bursaries to 168 students, with a success rate of over 50%, who have been integrated back into the agri sector under various employment titles. R1 million was spent on bursaries for both undergraduate and postgraduate students, as well as internships, and R200 271 was allocated for enterprise development training in 2023/24.

Commercialisation and sustainability: The potato industry defines 'commercial' as at least 30 hectares. To date, four growers have successfully commercialised. Additionally, the industry has increased the average farm size to 15 hectares. Notably, some farmers are achieving a tonnage of over 60 tonnes per hectare, equivalent to 45 tonnes on 30 hectares, the industry average. In the 2023/24 season, 37 farmers were linked to markets such as McCain, Fresh Produce Market, and Frimax, among others.

Partnerships: PSA has partnered with several institutions to facilitate the placement of funded students. Partnerships are formed with potential employers, and arrangements are made to host PSA-funded interns. Additionally, strong partnerships exist with the various Departments of Agriculture in several provinces (KZN, LP, EC, GP, MP). These partners are crucial in mobilising the community to participate in smallholder projects. A monitoring programme is in place to ensure the success of these projects. Furthermore, the Trust has partnered with the following institutions to ensure the sustainability of enterprise development projects: VKB, McCain, PepsiCo, and various Departments of Agriculture and Rural Development.

5.3.12. Hortgro

The Pome and Stone Fruit Industries prioritise transformation alongside economic and socio-economic development as core strategic focus areas. The industry envisions a globally competitive, equitable, unified, and economically transformed deciduous fruit sector through industry-led strategies and support programmes. With a holistic approach spanning from primary production to the entire value chain, the sector aims for inclusive growth and development across both traditional and non-traditional production areas. Integrating first-generation agripreneurs into the mainstream economy is central to this vision, as it enhances participation and ownership among previously excluded individuals or groups. Guided by the Economic Development Advisory Committee, the transformation strategy drives economic progress and ensures governance alignment with broader industry goals and objectives. During the period under review, Hortgro invested R17.2 million in transformation initiatives.

Table 17: Hortgro's expenditure on transformation, 2023/24

PILLAR	PROJECT TITLE	AMOUNT SPENT (R)
Enterprise development	Project management	1 427 216
	Capacity Building-Hortgro Skills Accelerator Programme	1 229 533
	Hortfin	5 790 025
	Business development support in traditional and non-traditional areas	2 450 735
	Technical support	144 111
	Strategy development	500 000
Skills development	Bursaries	4 700 000
	Learnerships	350 000
	Internships and mentorship programmes	400 000
Management Control		
Socio-economic development	Agriworker training programmes	300 000
Total		6 394 111

Source: Hortgro, 2025

Enterprise development: Out of the total transformation allocation, R11.5 million went to enterprise development. Hortgro identified projects aligning with the PALS framework for collaboration in the pome and stone fruit industry. Through Hortfin, Hortgro collaborated on projects, providing technical and management support to emerging growers, funding approved businesses, and facilitating job creation and the planting of new hectares. Additionally, consultants and specialists were appointed to support emerging growers with technical and management expertise and skills transfer.

Skills development: Under skills development, Hortgro allocated R750 000 to mentorship and internship programmes and R4.7 million to bursaries. These initiatives, conducted in partnership with Agri-SETA, provide mentorship and internship opportunities alongside student bursaries. By leveraging additional resources and opportunities, Hortgro enhances its skills development efforts.

Socio-economic development: Under socio-economic development, Hortgro allocated R300 000 for life-skills and social-development programmes for agri-workers.

Black farmers’ participation in pome and stone production: In the pome and stone fruit industry, around 1 155 producers operate, of whom 1 071 are commercial farmers, predominantly white. Additionally, 84 BEE projects focus on empowerment within the industry. A market-share analysis reveals that commercial farmers hold a 92% share, while smallholder farmers account for 8%.

5.3.13. Pecan Nuts

The SAPPA Board and management are committed to supporting transformation in the pecan-nut industry. The Transformation Committee sets guidelines and allocates funds to projects. Between 2024 and 2025, SAPPA provided 25 441 trees to 96 beneficiaries. During the period under review, the industry provided 3 003 trees to 30 existing and three new beneficiaries. Over time, the support was also extended to other production inputs. From 2022, more support has been allocated to beneficiaries with the potential to become commercial farmers. The 2024 tree allocation best illustrates this: an average of 47 trees were supplied to smallholder farmers and 164 to commercial and potential commercial farmers.

SAPPA invested R3.1 million in transformation initiatives (see Table 18), with R2.2 million allocated for enterprise development to aid farmers in purchasing orchards, soil preparation, fencing, irrigation, and inputs. Additionally, R652 337 supported black students with bursaries and trained new and existing pecan-nut farmers. A further R110 880 was spent on socio-economic development, supporting schools and non-profit organisations with land for tree planting.

Table 18: SAPPA’s expenditure on transformation, 2023/24

PILLAR	ACTIVITIES FUNDED	AMOUNT (R)
Enterprise development	Assist black farmers in establishing new pecan nut orchards, expanding the existing orchards, and improving yields.	2 262 921
Skills	Bursaries for black students working on pecan nut re-search projects and attending agricultural schools.	652 337
Management control		158 809
Socio-economic development	Provide trees and assistance to schools and non-profit organisations with available land.	110 880
Total		3 184 947

Source: SAPPA, 2025

Commercialisation and sustainability: Transformation aims to create Black commercial and sustainable enterprises. Most of the beneficiaries in areas where the industry utilises partnerships have limited land available, which restricts the opportunities to become commercial pecan-nut farmers. However, two beneficiaries have planted enough trees to be considered commercial, and two more have the potential to become commercial farmers. After receiving support, 29 projects ceased operations, while 82 continue. In South Africa, approximately 800 farmers produce pecans, including 150 Black smallholders and 400 commercial farmers, mostly white. Producing pecan nuts is challenging due to the lengthy harvesting and profitability period, typically five to seven years. As a result, some pecan-nut enterprises are not yet fully profitable.

6. SUCCESS STORIES

6.1. SA Wine

SA Wine maintains dynamic partnerships with government and industry stakeholders, including the Western Cape Department of Agriculture (WCDoA), Department of Agriculture (DoA), Department of Trade, Industry and Competition (DTIC), Vinpro, and Wines of South Africa (WoSA). These alliances enhance access to funding, technical assistance, market expansion, and policy advocacy, ensuring alignment with national transformation and development priorities. For example, WCDoA co-sponsors The Wine Arc incubator initiative. In 2024, SA Wine partnered with Wesgro and DTIC under the Atlanta Phambili initiative to strengthen export opportunities linked to the upcoming 2026 FIFA World Cup. Ethical-trade compliance was bolstered by a R1.85 million investment supporting WIETA certification for over 10 farms, improving labour practices and market credibility.

6.2 Table Eggs Industry

A group of four egg producers in the West Rand District Municipality of Gauteng (the Shumbaset group) approached the South African Poultry Association (SAPA) and the Gauteng Department of Agriculture, Rural Development and Environment (GDARDE). They proposed an egg-packing station to help their farms and others in the province comply with the Grading and Packaging Regulations R.345 and supply produce to formal markets. This concept fitted one of the objectives of the Egg Master Plan and was supported by both SAPA and GDARDE. The project includes one of the first machines imported from abroad, capable of grading approximately 72 000 eggs per hour (about 600 000 per day), collected from around 640 000 chickens. However, the machine is not yet at its full working capacity; already, 48 full-time jobs have been created on site, with more jobs to come from the farms as throughput increases.

This facility will serve the four beneficiaries of the project. It will also provide market access to smallholder farmers in Gauteng Province who wish to sell their produce in the formal market. One of the added benefits is that the project also has a strong logistics arm and is already supplying about 75 of the well-known formal retail stores (Shoprite, Pick n Pay, Boxer, Makro, etc.). The SAPA Egg Organisation believes that pooling our skills and resources, and working together with the government and all other relevant parties, can and will yield better results for all South Africans.

In September 2024, Honourable MEC of Agriculture and Rural Development in Gauteng, Ms Vuyiswa Ramokgopa, launched the Shumbaset Egg Packing Station (Sorting, Grading, Packaging, and Distribution) as one of the first Egg Master Plan projects.

7. CHALLENGES FACING THE AGRICULTURAL SECTOR IMPACTING TRANSFORMATION

Trusts and levy administrators face common challenges in implementing transformation, including the following:

- Budget limitations to expand transformation work
- Lack of access to land for beneficiaries to expand production
- Lack of access to credit due to a lack of collateral
- Lack of water-use licences and environmental impact assessments

However, there are specific industry-related challenges, highlighted below:

SATI: Challenges faced by SATI include the high price of land and the difficulty for PLAS farms to access finance due to a lack of collateral. Malfunctioning ports increase travelling time, lead to more claims, and result in greater losses for all farmers.

SAPPO: Challenges for SAPPO include securing funding due to high capital investment needs and low returns, as well as combating disease outbreaks.

Sorghum Trust: The Sorghum Trust is facing challenges in identifying reliable transformation initiatives and service providers due to a decline in sorghum production, largely attributed to the crop's tight profit margins. Among other factors, VAT on sorghum contributes to this.

8. CONCLUSION

The report highlights the transformation activities undertaken through statutory levies and trust funds during the 2023/24 financial year. Generally, spending on transformation conforms to the norms outlined in the NAMC Generic Guideline, with approximately 85% of funds allocated to enterprise development and skills development. However, more can be done through collaboration with the government, especially the Provincial Departments of Agriculture. One positive example is the partnership between the Shumbaset group, the South African Poultry Association (SAPA), and the Gauteng Department of Agriculture, Rural Development and Environment (GDARDE). The partners are developing an egg-packing station in the West Rand District Municipality of Gauteng Province.

Furthermore, the report addresses 2023/24 employment equity within agricultural trusts and levy administrators, highlighting the need for adherence to the Employment Equity Amendment Act, No. 47 of 2013. In terms of transformation income and expenditure, trusts and levies are crucially funding agricultural transformation efforts. Compared with the previous year, spending on transformation has increased slightly in the 2023/24 financial year.

APPENDIX A: CONTACT DETAILS OF LEVY ADMINISTRATORS AND TRANSFORMATION MANAGERS

ADMINISTERING BODY	CONTACT PERSON	TRANSFORMATION MANAGER
Cape Flora SA (Fynbos)	Ms Karien Bezuidenhout T: 021 870 2900 F: 021 870 2915 karien@hortgro.co.za	
Citrus Growers' Association of SA		Mr Lukhanyo Nkombisa C: 072 257 8386 lukhanyo@cga-gdc.co.za
Cotton SA	Dr Annette Bennett T: 012 8041462 C: 063 693 0287 annette@cottonsa.org.za	Mr Tertius Schoeman T: 012 804 1462 C: 072 488 1415 tertius@cottonsa.org.za
National Lucerne Trust	Mr Fritz Ruppig T: 044 272 8991 C: 082 823 7201 fritz@lusern.org.za	
Milk SA	Elekanyani Nekhavhambe T: 012 460 7312 elekanyani@milksa.co.za	Mr Godfrey Rathogwa T: 012 460 7312 C: 082 900 6712 godfrey@milksa.co.za
HORTGRO	Mariette Kotze T: 021 870 2900 mariette@hortgro.co.za	Ms Cynthia Mahlathi T: 021 870 2900 cynthia@hortgro.co.za
SA Macadamia Growers' Association		Mr Juandre du Toit T: 012 001 4107 C: 071 611 5184 juandre@samac.org.za
SA Olive Industry	Ms Wendy Petersen T: 021 201 8506 C: 082 578 4465 wendy@saolive.co.za	
SA Table Grape Industry		Mr Wilton September T: 021 863 0366 F: 021 872 4375 wilton@satgi.co.za
Raisins SA		Mr Pieter Smith T: 054 495 0283 pieters@raisinssa.co.za
SA Cultivar & Technology Agency (SACTA)		Mr Sandile Mahlangu C: 076 597 8278 Sandile@sactalevy.co.za
South African Pecan Producers' Association		Mr Andre Coetzee C: 083 271 6577 andrecoetzee@hortgro.co.za

ADMINISTERING BODY	CONTACT PERSON	TRANSFORMATION MANAGER
South African Pork Producers' Organisation		Ms Kgadi Senyatsi T: 012 100 3035 C: 073 861 3588 kgadi@sappo.org
Pomegranate Producers Association of South Africa (POMASA)	Ms Andriette de Jager T: 021 870 2900 F: 021 870 2915 andriette@hortgro.co.za	
Potatoes SA		Ms Rendani Murovhi T: 012 349 1906 C: 084 977 0579 Rendani@potatoes.co.za
Red Meat Industry Services	Mr Dewald Olivier C: 082 800 3737 dewald@rmis.co.za	
South African Wine Transformation Unit (SAWITU)		Ms Karin Kleinbooi T: 021 276 0720 C: 082 922 6144 karin@sawine.co.za
Mohair Empowerment Trust		Ms Beauty Mokgwamme T: 041 581 1681 beauty@mohair.co.za

APPENDIX B: AGRICULTURAL INDUSTRY TRUSTS AND LEVY ADMINISTRATORS

TRANSFORMATION QUESTIONNAIRE – 2023/24 SURVEY

PURPOSE OF THE SURVEY

The questionnaire is sent to trusts, levy administrators, CEOs, and transformation managers. It seeks to determine the status of transformation activities financed through trusts' funds and the 20% transformation levy, in line with the National Agricultural Marketing Council (NAMC) generic transformation guidelines. The NAMC has established a Transformation Review Committee to monitor the transformation efforts of various industries. The NAMC acknowledges that, over the years, industries administering levies and trust funds have done excellent work in funding key areas of enterprise and skills development. This information will be collected annually by the NAMC to compile the Annual Transformation Report on interventions funded through trusts' funds and the 20% statutory levy funds. The trusts and levy administrators/CEOs and/or transformation/development managers are kindly requested to provide the NAMC with the following information:

SECTION A: GENERAL INFORMATION

Name of your organisation and industry: _____

Does the industry trust/industry have a transformation manager/officer? If yes, please complete the table below:

Table 1: Transformation manager/officer information

Name of transformation manager/officer	Gender		Age (in years)	Ethnic group	Contact details
	Male	Female			

Please refer to Table 2 below for the employment equity information:

Table 2: Employment equity details

Category	No. of staff employed	African			Coloured			Indian			White		
		M	F	Y	M	F	Y	M	F	Y	M	F	Y
Top management													
Senior management													
Professionally qualified													
Skilled													
Semi-skilled													
Unskilled													
Total													

SECTION B: TRANSFORMATION INITIATIVES/PROJECTS

2.1. What is the industry/trust view and approach to transformation?

2.2. Does the industry/trust have a transformation strategy with targets?

2.2.1. If yes, please attach

2.2.2. If not, why not?

2.3. How many transformation initiatives/projects are supported by the Trust/industry levy administrator?

2.4. What is the annual value (in rand) of all supplier development contributions made to black-owned enterprises by the trust/industry in 2024?

Table 3: Supplier development contributions

Males	Females	Youth
R	R	R

2.5. Have any partnerships been developed for the implementation of trust/industry transformation? If yes,

2.6.1. What stakeholders, and what type of support, are provided through these partnerships?

2.6.2. What challenges is the industry/trust facing as a result of these partnerships?

2.6.3. What are the successes of these partnerships?

2.6.4. How many transformation initiatives/projects have been commercialised through these partnerships? Please name them and share some of the success stories.

2.7. What approach is used by the trust/industry to monitor progress?

2.8. Table 4 presents the NAMC's pillars of transformation; please complete it.

Table 4: Pillars of transformation guidelines

Pillar	Project title	Specific activities funded	Outcomes of programmes (Please provide details e.g., areas/ regions, actions performed, hectares/ livestock numbers/tonnages produced, jobs created etc.)	Number of beneficiaries			Markets ¹		Location	Status of supported / planned projects	Amount spent	% of the amount spent
				Males	Females	Youth	Type of market	Volumes				
Enterprise development												
Skills development												
Management control												
Ownership												
Socio-economic development												
Total												

¹ Are these long- or short-term markets?

Based on the information provided in Table 4,
How many transformation initiative beneficiaries have been commercialised by the trust/industry to date?

2.9.1. How many projects stopped operating after receiving trust/industry support?

2.9.1.1. How many of the beneficiaries are still viable after the trust/industry support?

2.9.1.2. Of the projects supported, how many are sustainable?

2.9.2. Table 5 seeks to gather information on the producers in your industry; please complete it.

Table 5: Industry information to track transformation in the sector

Estimated number of producers	Number of smallholder farmers (predominantly Black producers)	Number of commercial farmers (predominantly white)	Number of BEE projects and their market shares?	Percentage market share of smallholder farmers (predominantly Black producers)	Percentage market share of commercial farmers (predominantly white producers)

Based on the information provided in Table 5, what is the industry's plan to address the gaps in market shares?

What challenges does trust/industry face regarding transformation?

Are there any other matters you would like to share with the Minister regarding transformation?

SECTION C: BLACK FARMERS' VALUE CHAIN PARTICIPATION

- Subsistence farmers: produce for household consumption and may market limited surplus production, with an annual turnover of less than R 50 000.
- Medium-scale commercial farmers: produce for markets, with an annual turnover ranging between R 5 million and R 20 million.
- Large-scale farmers: produce for the market to make a profit, with an annual turnover above R 20 million.

Please refer to Table 6 to illustrate how the participation of predominantly Black farmers varies across different farming categories, based on various key indicators.

Table 6: Predominantly Black farmers' participation

Key indicators	Subsistence farmers	Medium scale commercial farmers	Large scale commercial farmers
3.1 Production of the product (tonnage)			
3.2 Value of production per category of smallholder farmers (R)			
3.3 Share of domestic market sales (%)			
3.4 Share of domestic market sales (%) in the agro-processing			
3.5 Share of export market sales (%) to SADC countries			
3.6 Share of export market sales (%) to EU countries			
3.7 Number of producers in the industry			
3.8 Number of jobs created in a farming enterprise			
3.9 Gender of producers			
3.10 Production areas and size by region			
3.11 Average price per tonne/kilogram			
3.12 Value of sales to informal markets/formal markets/international markets			
3.13 Total value (at first point of sale) of local production levied (not the value of the whole industry)			

SECTION D: AGRICULTURE AND AGRO-PROCESSING 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 Table 7 to indicate the various programmes your trust/industry is currently implementing in line with the six pillars of the AAMP.

Table 7: AAMP implementation/alignment

Pillar	Activities or programmes	Stakeholders involved	Description	Targets or indicators	Means of verification	Risks
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, promoting trade						
Improving localised food production, reducing imports, and expanding agro-processing exports.						

THANK YOU FOR YOUR CO-OPERATION

A photograph of two women in a nursery or agricultural setting. The woman in the foreground is wearing a white t-shirt and tan overalls, carrying a large white plastic crate filled with small green seedlings. She has her hair in braids. The woman in the background is wearing a yellow shirt and blue jeans, also carrying a similar crate. They are walking on a dirt path with trees and a building in the background.

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