

STATUS REPORT ON

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



A REPORT BY THE NATIONAL AGRICULTURAL MARKETING
COUNCIL TO THE MINISTER OF AGRICULTURE

2025 SURVEY

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I. SUMMARY

The Marketing of Agricultural Products Act, No. 47 of 1996 (MAP Act), as amended, provides for the establishment of statutory measures. Section 9 of the MAP Act directs that the National Agricultural Marketing Council (NAMC) must monitor the application of statutory measures and report thereon to the Minister and shall evaluate and review such measures at least every two years. Since 2001, the NAMC has conducted an annual review of all statutory measures implemented in terms of the MAP Act.

A “statutory measure” includes a levy contemplated in Section 15 of the MAP Act, the control of exports of agricultural products in terms of Section 16, records and returns in terms of Section 18, and registrations in terms of Section 19. Since 1997, statutory measures, namely levies, records and returns, and registrations, have been approved by the Minister responsible for agriculture (hereafter referred to as the Minister) and promulgated in the Government Gazette for specific agricultural products and for specific periods of time. The statutory measure relating to the control of exports of agricultural products (Section 16) has not, to date, been requested or implemented.

This report (2025 Review on statutory measures), compiled by the NAMC for submission to the Minister, focuses only on the various levies collected (23 different levies) by the 21 agricultural industries concerned, including the activities funded by statutory levy income. In the deciduous fruit industry, there are three different levies, namely a general levy, a market development levy and a fruit fly levy.

A statutory levy is a charge per unit of an agricultural commodity at any point in the marketing chain between the producer and the consumer, which is collected to finance specific functions in the specific industry, such as research, market access, information and transformation. It should be noted that, although transformation is an important function mentioned in this report, details on transformation expenditure and projects funded is dealt with in a separate report by the NAMC to the Minister.

Levies are payable by specific directly affected groups (usually producers and/or exporters and importers) in a particular industry. The point of levy collection is in most cases at the first point of sale. Therefore, the levy income is influenced by production volume and agricultural trade and, to some extent, the levy collection success rate.

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

The levy administrators’ total funds collected through statutory levies in the 2025 survey amounted to approximately R1.155 billion, which is 0.52% higher than R1.149 billion in the 2024 survey.

The 2025 survey shows that approximately R1.210 billion was spent on industry functions, which represents an increase of 4.8% compared to the R1.106 billion expenditure in the 2024 survey. Of the total expenditure, about 46.7% was spent on research, 13.0% on export promotion/market access, and 6.4% on information. About 19.7% (R237.5 million) was spent on transformation projects. This represents an increase of 5.0% spending on transformation intervention compared to the previous year. It is important to note that all the figures analysed in this 2025 survey were obtained from the relevant audited financial statements as received from levy administrators.

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

2. STATUTORY LEVIES

2.1 LEVIES REVIEWED IN THE 2025 SURVEY

The details of the different administering bodies that were responsible for statutory levy collection and expenditure in the specific financial year reported on in this survey, as well as the levy terms applicable, are summarised as follows:

TABLE 1: STATUTORY LEVIES REVIEWED – 2025 SURVEY

PRODUCT	ADMINISTERING BODY	FINANCIAL STATEMENTS	MEASURE INTRODUCED	MEASURE LAPSES	DURATION
Citrus	SA Citrus Growers' Association (CGA)	Apr 2024 – Mar 2025	1 Jan 2025	31 Dec 2028	4 years
Cotton lint	Cotton SA	Apr 2023 – Mar 2024	1 April 2022	31 Mar 2026	4 years
Dairy	Milk SA	Jan 2024 – Dec 2024	1 Jan 2022	31 Dec 2025	4 years
Deciduous fruit					
- Pome and stone fruit & market development	HORTGRO	Oct 2023 – Sep 2024	6 Oct 2023	6 Oct 2027	4 years
- Fruit Fly	FruitFly Africa (FFA)	Jul 2023 – Jun 2024	23 Sep 2020	23 Sep 2024	4 years
Dried vine fruit	Raisins South Africa	Jan 2024 – Dec 2024	10 Jan 2025	10 Jan 2029	4 years
Fynbos (proteas)	Cape Flora SA	Mar 2024 – Feb 2025	Sep 2025	30 Sep 2028	4 years
Lucerne	National Lucerne Trust	Sep 2023 – Aug 2024	30 Nov 2022	30 Nov 2026	4 years
Lupines	SA Cultivar and Technology Agency (SACTA)	Mar 2024 – Feb 2025	1 Oct 2023	30 Sep 2025	2 years
Macadamias	Macadamias South Africa Non-Profit Company	Mar 2024 – Feb 2025	15 Nov 2022	28 Nov 2027	4 years
Olives	South African Olive Industry Association	Nov 2023 – Oct 2024	11 Oct 2024	11 Oct 2028	4 years
Pecans	SA Pecan Nut Producers' Association	Mar 2024 – Feb 2025	1 Mar 2020	1 Mar 2024	4 years
Pomegranates	Pomegranate Association of SA	Sep 2023 – Aug 2024	2 Feb 2024	2 Feb 2028	4 years
Pork	SA Pork Producers' Organisation	Jan 2024 – Dec 2024	1 Nov 2025	31 Oct 2028	3 years
Potatoes	Potatoes SA	Jul 2023 – Jun 2024	1 Jul 2013	30 Jun 2027	4 years
Red meat	Red Meat Levy Admin	Mar 2023 – Feb 2024	4 Nov 2022	4 Nov 2026	4 years
Meat and poultry import and export *	Association of Meat Importers & Exporters South Africa (AMIE)	Oct 2023 - Sep 2024	24 Mar 2023	24 Mar 2027	4 years
Soybeans	SACTA	Mar 2024 – Feb 2025	1 Mar 2023	28 Feb 2025	2 years
Table eggs	Table Egg Levy Admin	Jan 2024 – Dec 2024	1 Apr 2022	31 Mar 2026	4 years
Table grapes	South African Table Grape Industry	Nov 2023 – Oct 2024	25 Oct 2024	25 Oct 2028	4 years
Wine and grapes	SAWIS, WINETECH, WOSA and SAWITU	Jan 2024 – Dec 2024	1 Jan 2022	31 Dec 2025	4 years
Winter cereals	SACTA	Mar 2024 – Feb 2025	1 Oct 2023	30 Sep 2026	3 years

2.2. TOTAL LEVY INCOME

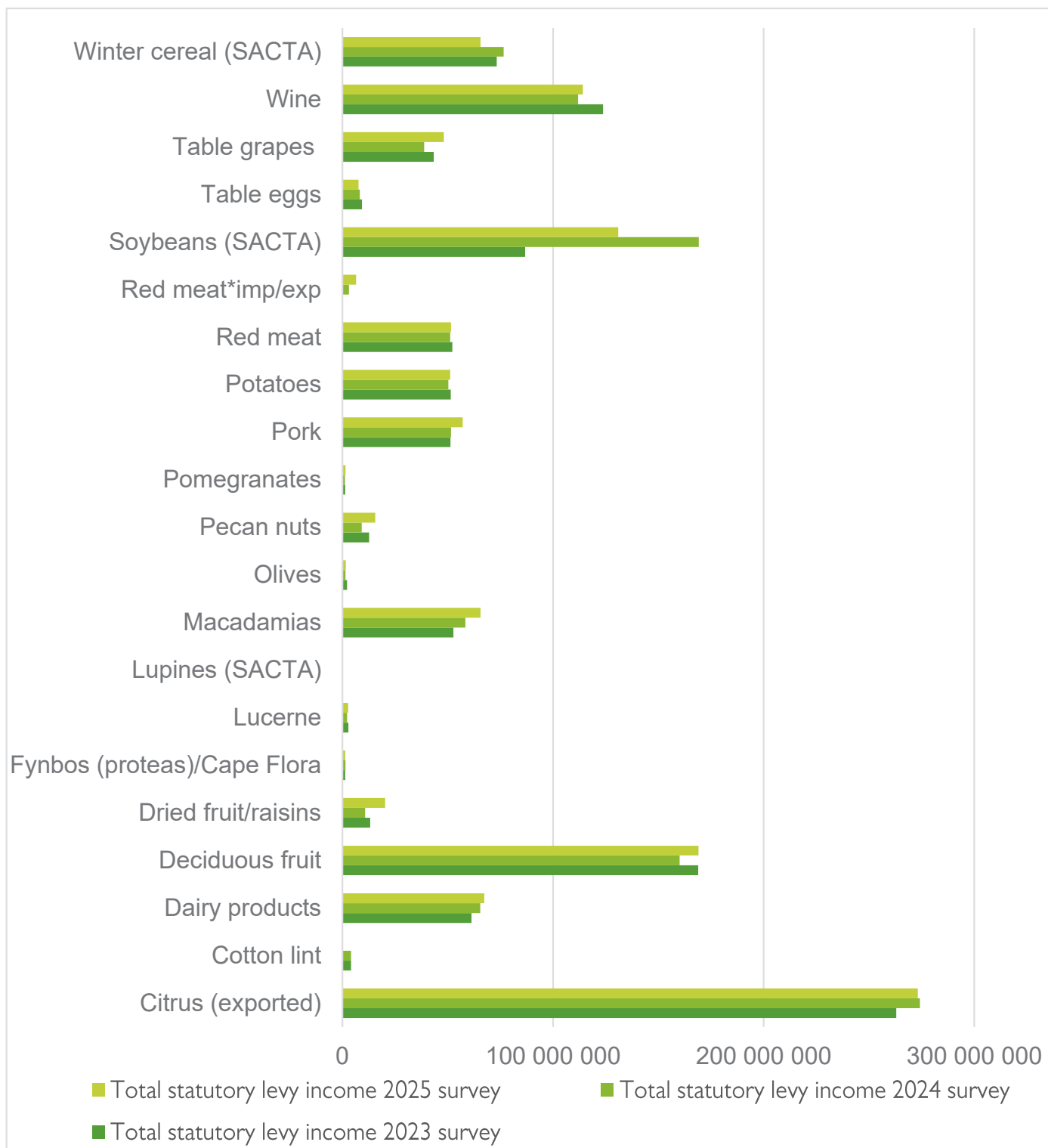
The total funds collected through statutory levies reported in the 2025 survey amounted to approximately R1.155 billion, which is 0.52% higher compared to the previous survey's reported levy income of roughly R1.149 billion in the 2024 survey.

TABLE 2: TOTAL LEVY INCOME – 2025 SURVEY

PRODUCT	2021 SURVEY	2022 SURVEY	2023 SURVEY	2024 SURVEY	2025 SURVEY
	R	R	R	R	R
Citrus (exported)	108 102 782	254 770 473	262 925 472	274 197 182	273 135 724
Cotton lint	11 991 781	7 330 439	4 122 032	4 085 351	4 258 298
Dairy products	60 078 788	62 739 378	61 293 766	65 429 661	67 276 635
Deciduous fruit	118 768 042	139 724 733	168 961 765	160 136 830	169 113 208
Dried fruit	10 328 572	11 616 397	13 216 129	10 841 301	20 253 280
Fynbos (proteas)	908 868	1 311 632	1 323 423	1 401 047	1 389 980
Lucerne	2 508 029	2 710 694	2 807 518	2 234 147	2 719 545
Lupines (SACTA)	n/a	509 853	147 365	168 786	252 779
Macadamias	26 844 259	33 852 101	52 709 761	58 347 568	65 573 960
Olives	1 848 684	1 354 292	2 229 988	1 458 646	1 581 104
Pecan nuts	7 481 785	6 724 370	12 739 434	9 207 388	15 628 471
Pomegranates	787 938	872 403	1 382 519	1 216 109	1 412 820
Pork	40 669 784	40 212 526	51 360 123	51 532 217	57 066 462
Potatoes	49 517 469	48 515 521	51 408 150	50 357 561	51 186 028
Red meat	49 644 570	49 677 110	52 221 890	51 212 239	51 582 698
Meat*imp/exp				3 131 251	6 557 856
Soybeans (SACTA)	89 600 307	87 336 501	86 822 508	169 250 071	130 887 504
Table eggs	8 402 663	8 795 046	9 265 514	8 227 157	7 583 899
Table grapes	32 166 534	38 697 413	43 412 645	38 769 518	48 194 505
Wine	92 468 114	115 461 535	123 741 673	111 857 399	114 161 994
Winter cereal (SACTA)	61 408 266	73 843 106	73 243 697	76 497 401	65 611 951
TOTAL	808 939 146	986 055 523	1 075 335 372	1 149 558 830	1 155 428 701
Annual increase	9,04%	17,96%	8,30%	6,71%	0,52%

The following graph illustrates the levy income per industry over the past three years. It is also evident from this graph that the citrus industry collects the biggest part of total levy income, followed by the deciduous fruit, wine and soybean industries.

FIGURE I: LEVY INCOME OVER THE PAST THREE YEARS PER INDUSTRY



The reason for increases and decreases in levy income per industry is difficult to answer. As this 2025 survey covers different financial years of the levy administrators concerned, it is assumed that the overall agricultural production performance of 2023/24 and 2024/25 should be considered.

According to the 2024/25 National Department of Agriculture’s economic review report, the value of primary agricultural production in South Africa increased by 6,8%, reaching an estimated R477 454 million in 2024/2025, compared to R446 972 million in 2023/2024. Over the past decade, primary agriculture recorded an average nominal growth rate of 8,5% and a real growth rate of 2,9% annually. Agriculture’s contribution to the country’s Gross Domestic Product (GDP) increased from 2,1% in 2014 to 2,7% in 2024 in nominal terms, and from 2,3% in 2014 to 2,5% in 2024 in real terms.

In 2025, South Africa's agricultural sector faced several challenges ranging from animal diseases in livestock and poultry subsector and geopolitics aspect especially with SA's trading partners such as the United States under AGOA. These challenges are likely to impact on SA's overall annual performance to some extent, compared to the previous year.

In 2024/25, the total estimated agricultural production volumes were 4,5% more compared to the previous year. The volume of field crop production increased by 12,2% during the 2024/25, mainly because of an increase in the production of summer crops such as maize, sorghum, soyabeans, sunflower seed and groundnuts. Furthermore, the production of winter crops such as oats and canola also increased compared to the 2023/24. Horticultural production decreased by 0,8% for 2024/25, which can mainly be because of the decreases in the production of subtropical fruits (guavas, mangoes, avocados, litchis, bananas and pineapples), as well as deciduous fruits (apricots and apples). Furthermore, the production of dried fruits and nuts also contributed to a decrease in horticultural products as compared to the previous season. Animal production increased by 3,7%, mainly because of an increase in the production of slaughtered stock (cattle, sheep and lamb, pork and goat), eggs and poultry meat, as well as pastoral animal products (wool, mohair and ostrich feathers) as compared to 2023/24.

The above highlights some of the factors that may attribute to the lower than expected statutory levy income collections in the relevant industries. This is because, statutory levy income is influenced by the agricultural sector's many challenges, including intensified delays and inefficiencies at the ports, deteriorating rail and road infrastructure, worsening municipal service delivery, increased geopolitical uncertainty and load shedding. Rising crime and theft, lingering animal diseases and relatively higher interest costs add to these challenges. Agricultural production conditions further remain tough because of the drought in southern Africa.



2.2. TOTAL LEVY EXPENDITURE

The 2025 survey shows that approximately R1.210 billion was spent on industry functions, which represents an increase of 4.8% compared to the R1.106 billion expenditure in the 2024 survey. Of the total expenditure, about 46.7% was spent on research, 13.0% on export promotion/market access, and 6.4% on information. About 19.7% (R237.5 million) was spent on transformation projects. This represents an increase of 5.2% spending on transformation intervention compared to the previous year.

Table 3: ALLOCATION OF LEVY EXPENDITURE – 2025 SURVEY

FUNCTIONS FUNDED	2023 SURVEY	2024 SURVEY	2025 SURVEY	2025
	R	R	R	%
Administration	54 522 048	59 717 185	72 878 978	6,0
Information	79 555 284	89 072 306	77 603 495	6,4
Research	460 064 529	493 933 015	563 961 486	46,7
Transformation	202 113 148	225 704 614	237 483 475	19,7
Export promotion/ market access	103 565 687	116 782 522	157 095 684	13,0
Consumer education / promotion	71 130 610	66 439 056	44 734 397	3,7
Production development	6 849 795	3 429 649	8 480 660	0,7
Plant improvement	4 706 905	12 938 677	4 706 905	0,4
Quality control	39 883 442	38 233 054	39 407 364	3,3
TOTAL	1 022 391 448	1 106 250 078	1 210 387 223	100

Further details on the levy expenditure per industry and per function are provided in Table 4 on the next page.

TABLE 4: LEVY ALLOCATIONS TO FUNCTIONS, PER INDUSTRY AND IN TOTAL- 2025 SURVEY

INDUSTRY	ADMINISTRATION	INFORMATION	RESEARCH / CULTIVAR DEVELOPMENT	TRANSFORMATION	EXPORT PROMOTION / MARKET ACCESS	CONSUMER EDUCATION / PROMOTION	PRODUCTION DEVELOPMENT	PLANT IMPROVEMENT	QUALITY CONTROL	TOTAL PER INDUSTRY AND % OF TOTAL
	RAND AND % OF TOTAL EXPENDITURE									
Citrus exported	17 043 066	3 398 513	179 830 984	63 671 247	26 508 711					290 452 521
%	5,9%	1,2%	61,9%	21,9%	9,1%					100,0%
Cotton	140 652	6 884 705	322 944	1 339 745	311 750				3 072 272	12 072 068
	1,2%	57,0%	2,7%	11,1%	2,6%	0,0%			25,4%	100,0%
Dairy	7 326 657	5 231 563	4 154 777	16 222 728		19 721 387			12 494 645	65 151 757
	11,2%	8,0%	6,4%	24,9%		30,3%			19,2%	100,0%
Deciduous fruit	7 376 778	2 410 311	78 084 863	28 462 252	31 649 151			4 706 905		152 690 260
	4,8%	1,6%	51,1%	18,6%	20,7%			3,1%		100,0%
***Pome / stone fruit	7 376 777	2 410 311	36 479 445	15 156 187	9 989 189			14 348 761		85 760 670
	8,6%	2,8%	42,5%	17,7%	11,6%			16,7%		100,0%
***Market Access					28 603 034					28 603 034
					100,0%					100,0%
***Fruit Fly Africa			41 605 418							41 605 418
			100,0%							100,0%
Dried fruit	2 025 787	1 847 852	5 399 067	4 050 656	6 929 918					20 253 280
	10,0%	9,1%	26,7%	20,0%	34,2%					100,0%
Fynbos (proteas)	353 515	683 546	511 213	477 708						2 025 982
	17,4%	33,7%	25,2%	23,6%						100,0%
Lucerne	260 890	686 197	611 684	698 054					762 512	3 019 337
	8,6%	22,7%	20,3%	23,1%					25,3%	100,0%
Lupines (SACTA)	8 493		3 316	50 049						61 858
	13,7%		5,4%	80,9%						100,0%
Macadamias	5 898 122	10 409 678	18 697 247	14 187 816	25 698 799					74 891 662
	7,9%	13,9%	25,0%	18,9%	34,3%					100,0%
Olives	79 055	316 221	237 166	316 221		632 442				1 581 104
	5,0%	20,0%	15,0%	20,0%		40,0%				100,0%
Pecan nuts	1 070 249	3 044 353	4 035 975	3 184 947	2 473 615					13 809 139
	7,8%	22,0%	29,2%	23,1%	17,9%					100,0%
Pomegranates	122 232	163 736	238 649	84 808	23 028	190 805				823 258

INDUSTRY	ADMINISTRATION	INFORMATION	RESEARCH / CULTIVAR DEVELOPMENT	TRANSFORMATION	EXPORT PROMOTION / MARKET ACCESS	CONSUMER EDUCATION / PROMOTION	PRODUCTION DEVELOPMENT	PLANT IMPROVEMENT	QUALITY CONTROL	TOTAL PER INDUSTRY AND % OF TOTAL
	RAND AND % OF TOTAL EXPENDITURE									
	14,8%	19,9%	29,0%	10,3%	2,8%	23,2%				100,0%
Pork	6 139 038	6 320 631	2 028 735	11 913 600		19 515 810			10 304 521	56 222 335
	10,9%	11,2%	3,6%	21,2%		34,7%			18,3%	100,0%
Potato	2 309 458	11 508 174	14 414 259	12 361 900	9 921 522					50 515 313
	4,6%	22,8%	28,5%	24,5%						80,4%
Red meat	4 414 313	1 200 255	608 360	4 540 750	1 588 403	2 755 789	8 480 660		3 364 303	26 952 833
	16,4%	4,5%	2,3%	16,8%		10,2%	31,5%		12,5%	0
Meat import/exports	377 862			1 147 554	181 411	670 552			1 657 401	4 034 780
	9,4%			28,4%	4,5%	16,6%			41,1%	100,0%
Soybeans (SACTA)	4 397 342		146 410 321	25 915 063						176 722 726
	2,5%		82,8%	14,7%						100,0%
Table eggs	2 038 254	1 369 731	151 511	1 299 314		1 918 164			3 305 376	10 082 350
	20,2%	13,6%	1,5%	12,9%		19,0%			32,8%	100,0%
Table grapes	2 712 478	7 682 553	10 202 859	10 579 343	9 011 155				6 103 735	46 292 123
	5,9%	16,6%	22,0%	22,9%	19,5%				13,2%	100,0%
Wine	6 958 277	14 445 476	34 039 035	25 136 439	42 979 632					123 558 859
	5,6%	11,7%	27,5%	20,3%	34,8%					100,0%
Winter cereal (SAC-TA)	2 204 322		63 978 521	12 990 835						79 173 678
	2,8%		80,8%	16,4%						100,0%
Total	72 878 978	77 603 495	563 961 486	237 483 475	157 095 684	44 734 397	8 480 660	4 706 905	39 407 364	1 210 387 223
% spent on function	6,0%	6,4%	46,7%	19,7%	13,0%	3,7%	0,7%	0,4%	3,3%	100,0%

TABLE 5: COMPARISON BETWEEN INCOME AND EXPENDITURE

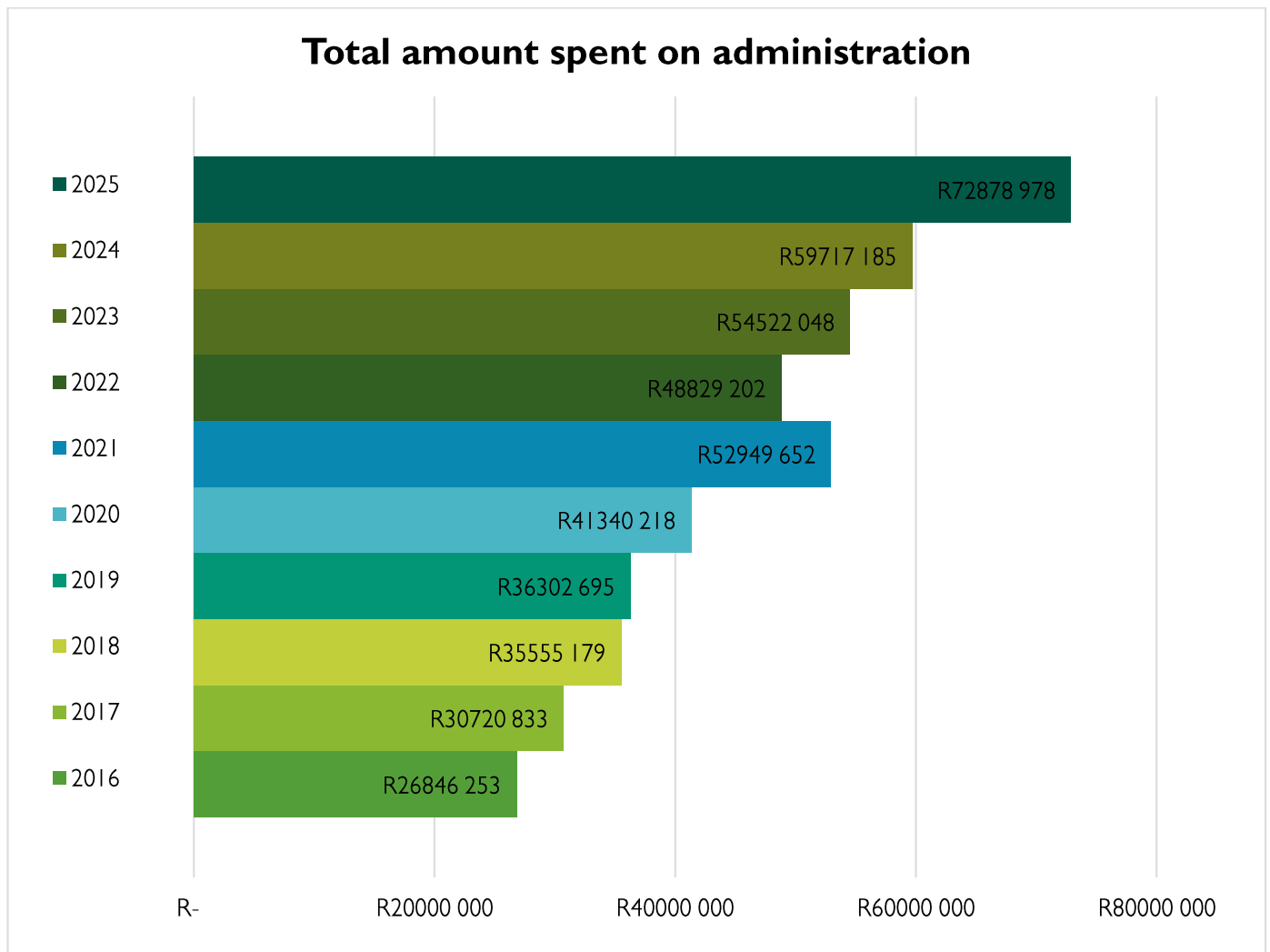
INDUSTRY	LEVY INCOME	LEVY EXPENDITURE	SURPLUS/DEFICIT
	R	R	R
Citrus (exported)	273 135 724	290 452 521	-17 316 797
Cotton lint	4 258 298	12 072 068	-7 813 770
Dairy products	67 276 635	65 151 757	2 124 878
Deciduous Fruit	169 113 208	152 690 260	16 422 948
***Hortgro Pome and stone	85 686 454	85 760 670	-74 216
***Hortgro Market development	36 218 951	28 603 034	7 615 917
***Fruitfly Africa	47 207 803	41 605 418	5 602 385
Dried fruit	20 253 280	20 253 280	0
Fynbos (proteas)	1 389 980	2 025 982	-636 002
Lucerne	2 719 545	3 019 337	-299 792
Lupines (SACTA)	252 779	61 858	190 921
Macadamias	65 573 960	74 891 662	-9 317 702
Olives	1 581 104	1 581 104	0
Pecan nuts	15 628 471	13 809 139	1 819 332
Pomegranates	1 412 820	823 258	589 562
Pork	57 066 462	56 222 335	844 127
Potatoes	51 186 028	50 515 313	670 715
Red meat	51 582 698	26 952 833	24 629 865
Meat (AMIE)	6 557 856	4 034 780	2 523 076
Soybeans (SACTA)	130 887 504	176 722 726	-45 835 222
Table eggs	7 583 899	10 082 350	-2 498 451
Table grapes	48 194 505	46 292 123	1 902 382
Wine	114 161 994	123 558 859	-9 396 865
Winter cereal (SACTA)	65 611 951	79 173 678	-13 561 727

It is important to note that in most cases, statutory levies be promulgated for a period of four years, and any surpluses of shortages in one particular year, will be addressed in other years of the levy period. In other industries, like the cotton industry, where expenditure is much more than income, it must be noted that other sources of income (such as rental income) being used to finance expenditure.

2.4. LEVY FUNDS SPENT ON INFORMATION OVER THE PAST 10 YEARS

The following pages contain an evaluation of the total spending on generic functions for the past 10 years.

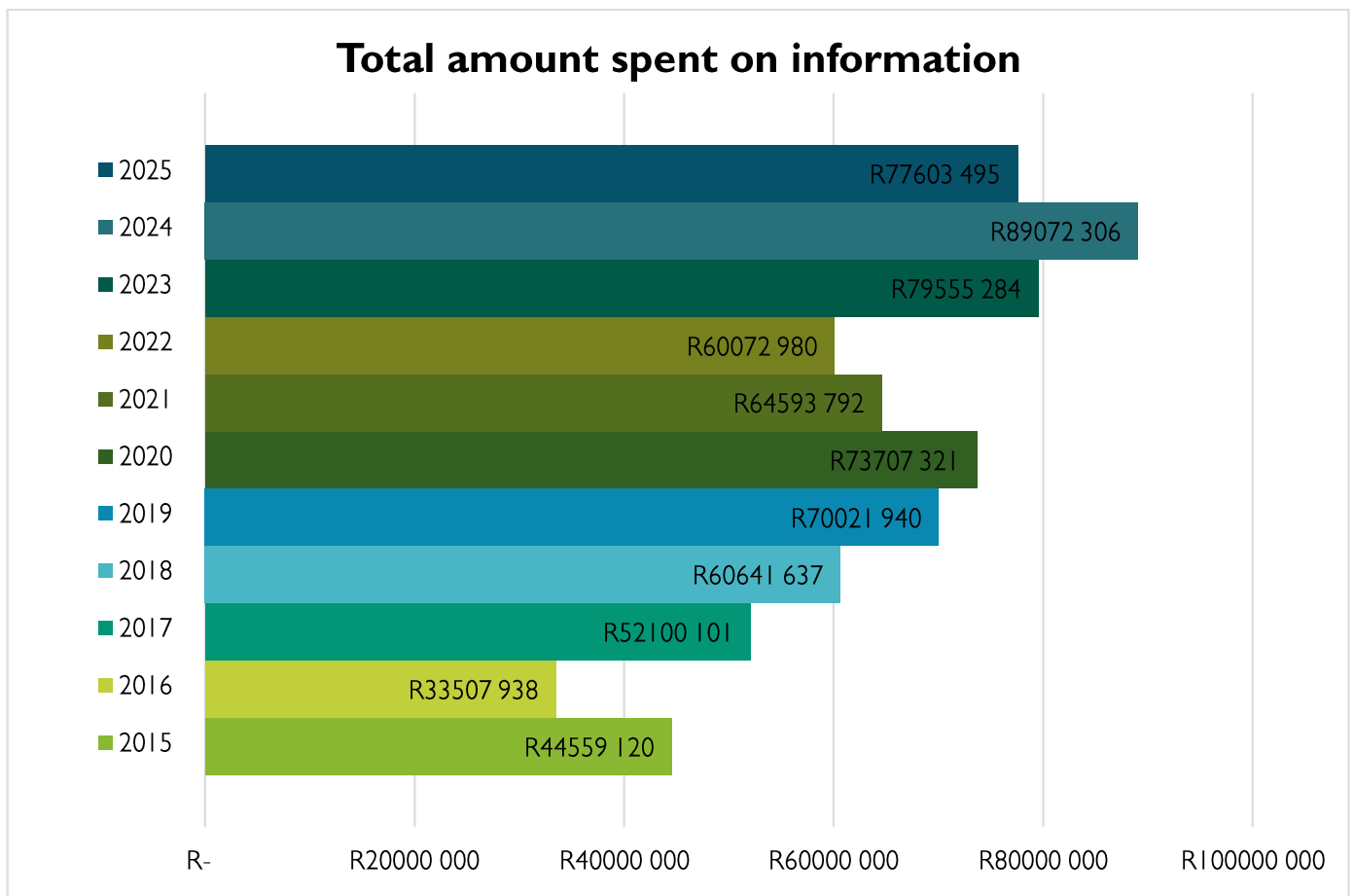
Figure 2: LEVY FUNDS SPENT ON ADMINISTRATION OVER THE PAST 10 YEARS



Administration:

The NAMC's guidelines on the utilisation of statutory levy funds stipulate that not more than 10% of levies collected should be used for administrative purposes. The 2025 survey shows that, in total, all levy administrators spent approximately 6.0% (R72.9 million) of levies collected on administration costs, which is well below the guideline of 10%. Audit fees are one of the major components of administration costs. The figure below indicates the total expenditure on administration for the past 10 years.

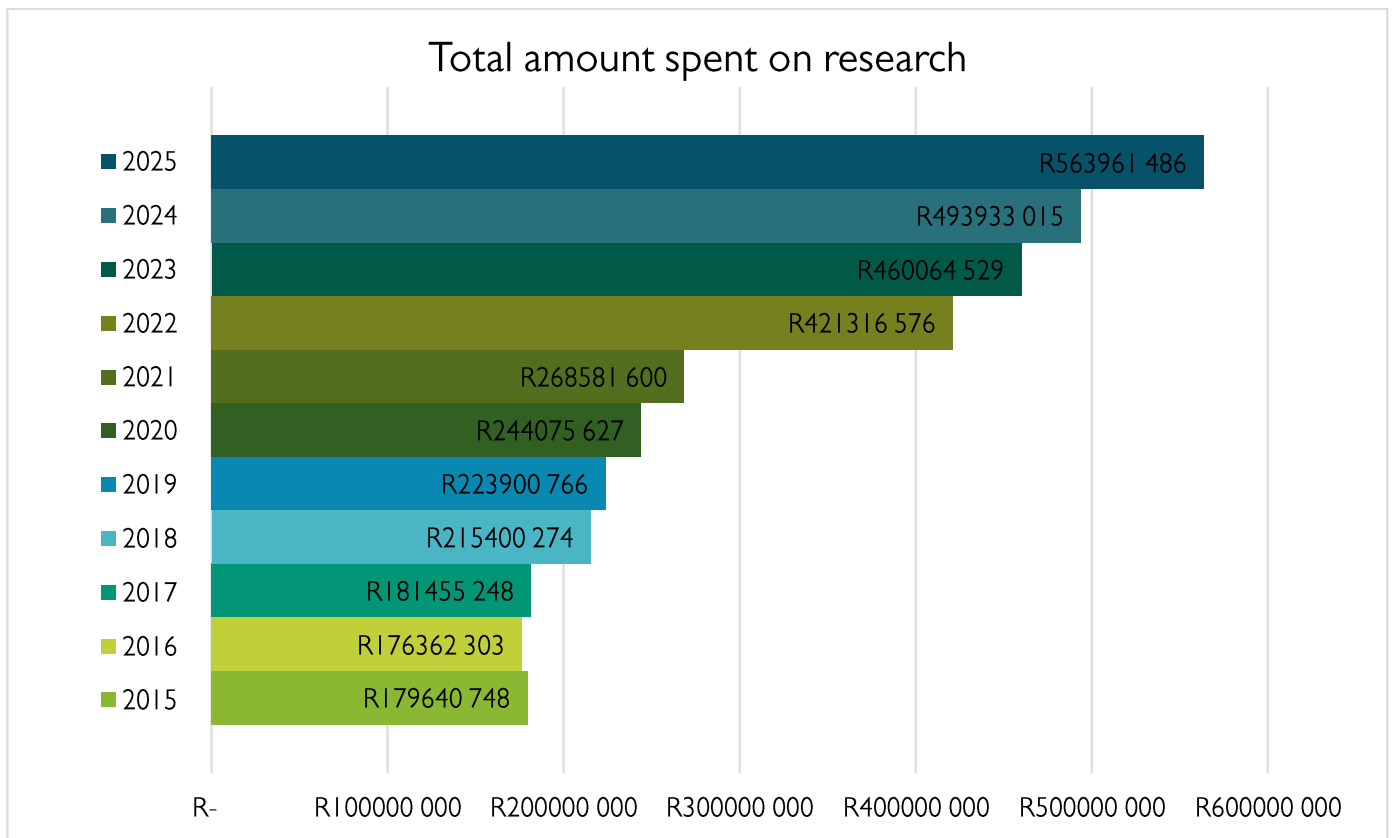
FIGURE 3: LEVY FUNDS SPENT ON INFORMATION OVER THE PAST 10 YEARS



Information:

For the 2025 survey, approximately 6.4% (R77.6 million) of total levy expenditure was allocated to the information function.

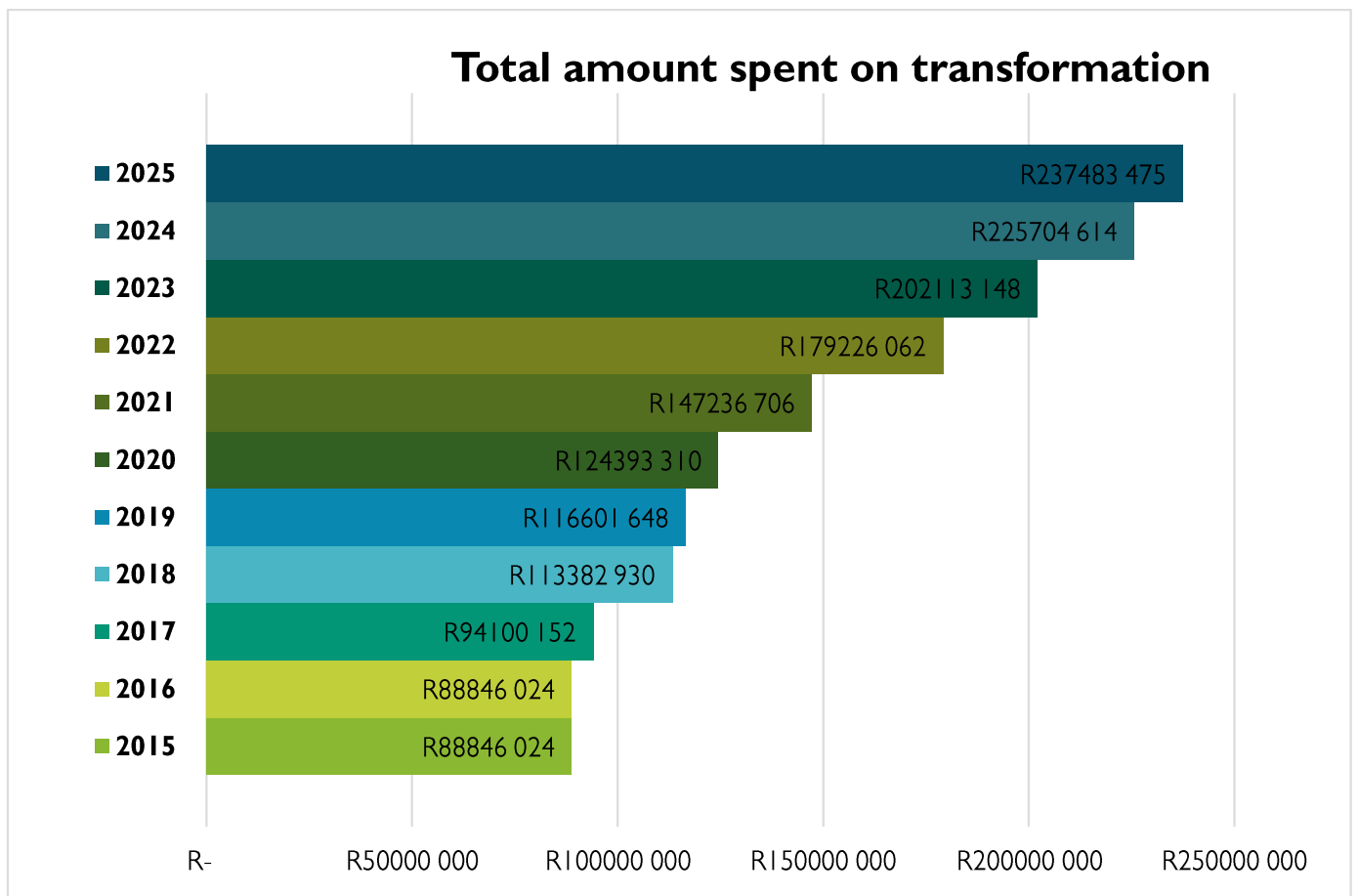
FIGURE 4: LEVY FUNDS SPENT ON RESEARCH FOR THE PAST 10 YEARS



Research:

Research is the generic function that receives the largest proportion of total statutory levies. A steady increase in levies spent on research is evident over the past 10 years, as indicated in Figure 4. The 2025 survey shows that approximately 46.7% (or R563.0 million) of total levy expenditure was allocated to the research function.

FIGURE 5: LEVY FUNDS SPENT ON TRANSFORMATION FOR THE PAST 10 YEARS

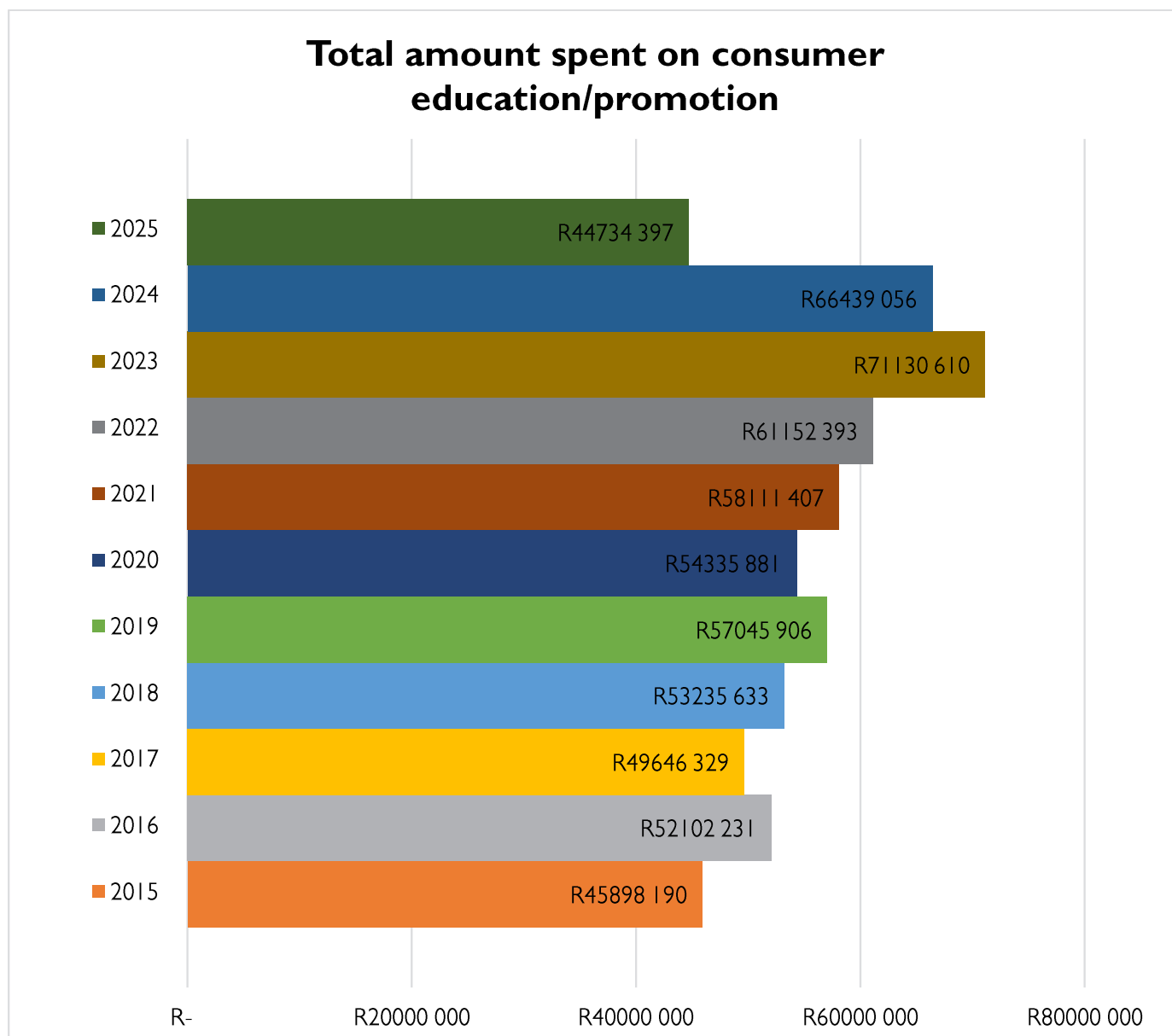


Transformation:

According to the 2025 survey, approximately 19.7% (R237.5 million) was spent on transformation projects, compared to R225.7 million reported in the previous survey, being an increase of 5.0%. This is in line with the condition of approval for all statutory levies, namely that at least 20% of statutory levy income must be used for transformation activities.

It should however be noted that two statutory levies, namely the market access and the fruit fly statutory levies in the deciduous fruit industry, were approved without the condition that at least 20% of levies must be allocated towards transformation activities.

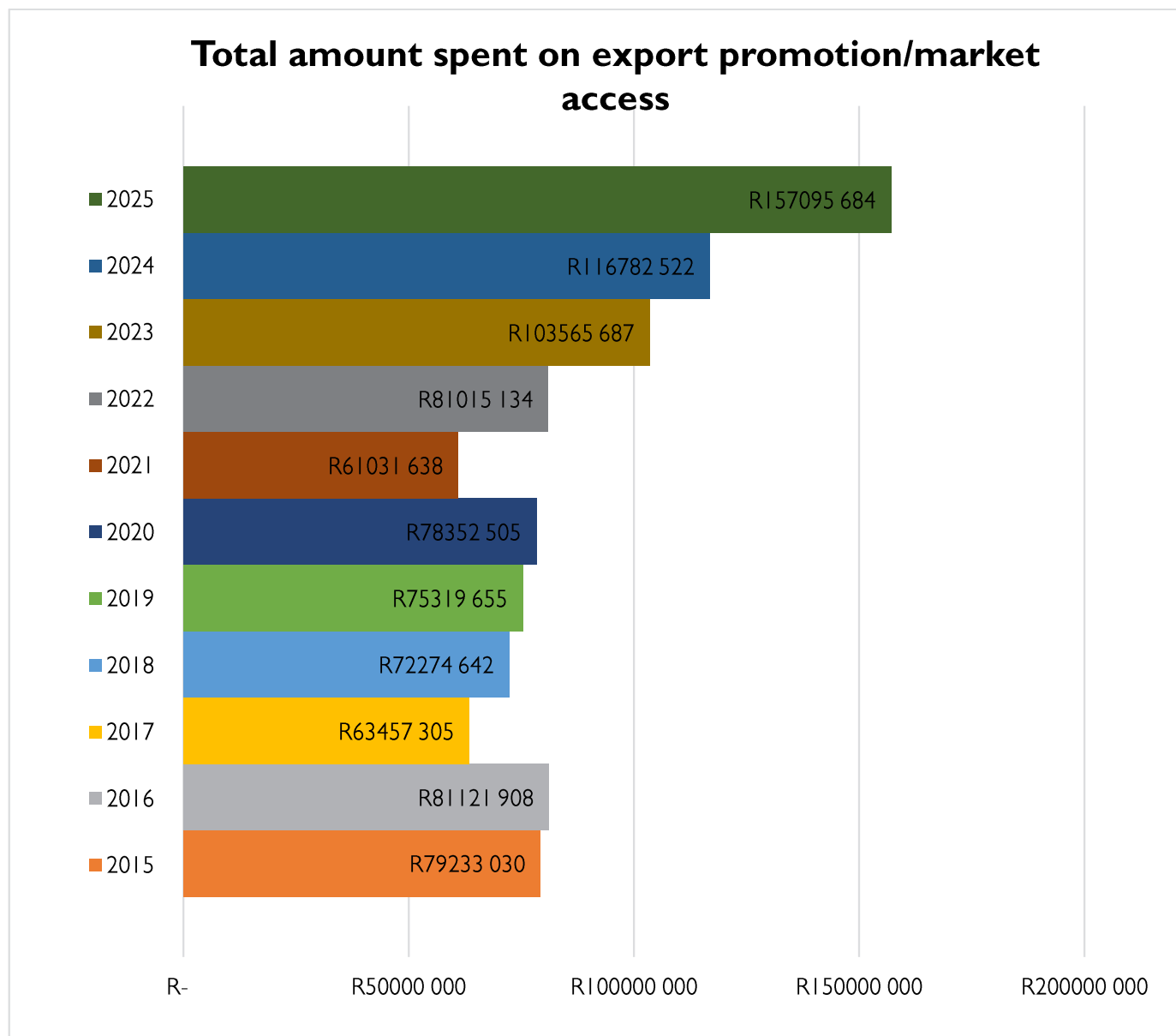
FIGURE 6: LEVY FUNDS SPENT ON CONSUMER EDUCATION/LOCAL PROMOTION OVER THE PAST 10 YEARS



Consumer education/local promotion:

According to the 2025 survey, approximately **3.7% (R44.7 million)** of total levy expenditure was spent on consumer education/local promotion, compared with the R66.4 million reported in the previous survey. The dairy, olive, pork, potato, red meat and table egg industries spent a major part of statutory levies on consumer education/local promotion.

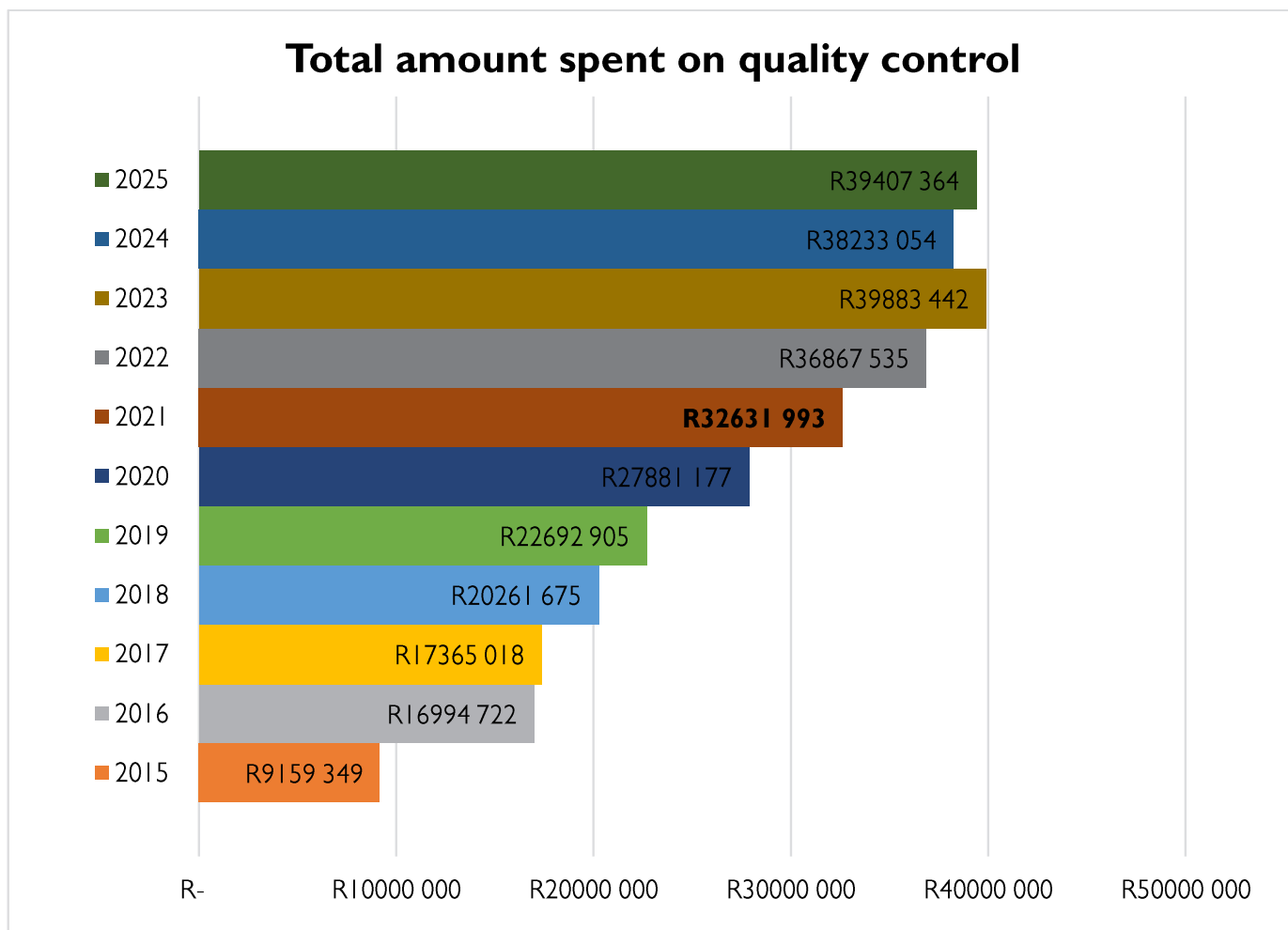
FIGURE 7: LEVY FUNDS SPENT ON EXPORT PROMOTION/MARKET ACCESS OVER THE PAST 10 YEARS



Export promotion and market access:

The 2025 survey indicated that approximately **13.0% (R157.1 million)** of total levy expenditure was allocated to export promotion and market access. The horticultural industries, and more specifically the citrus, deciduous fruit, dried fruit, table grape and wine industries, spent a major portion of their statutory funds on export promotion activities. The market development levy in the deciduous fruit industry is used specifically to fund the market development/consumer education programmes planned in Europe, the Middle East and the Far East.

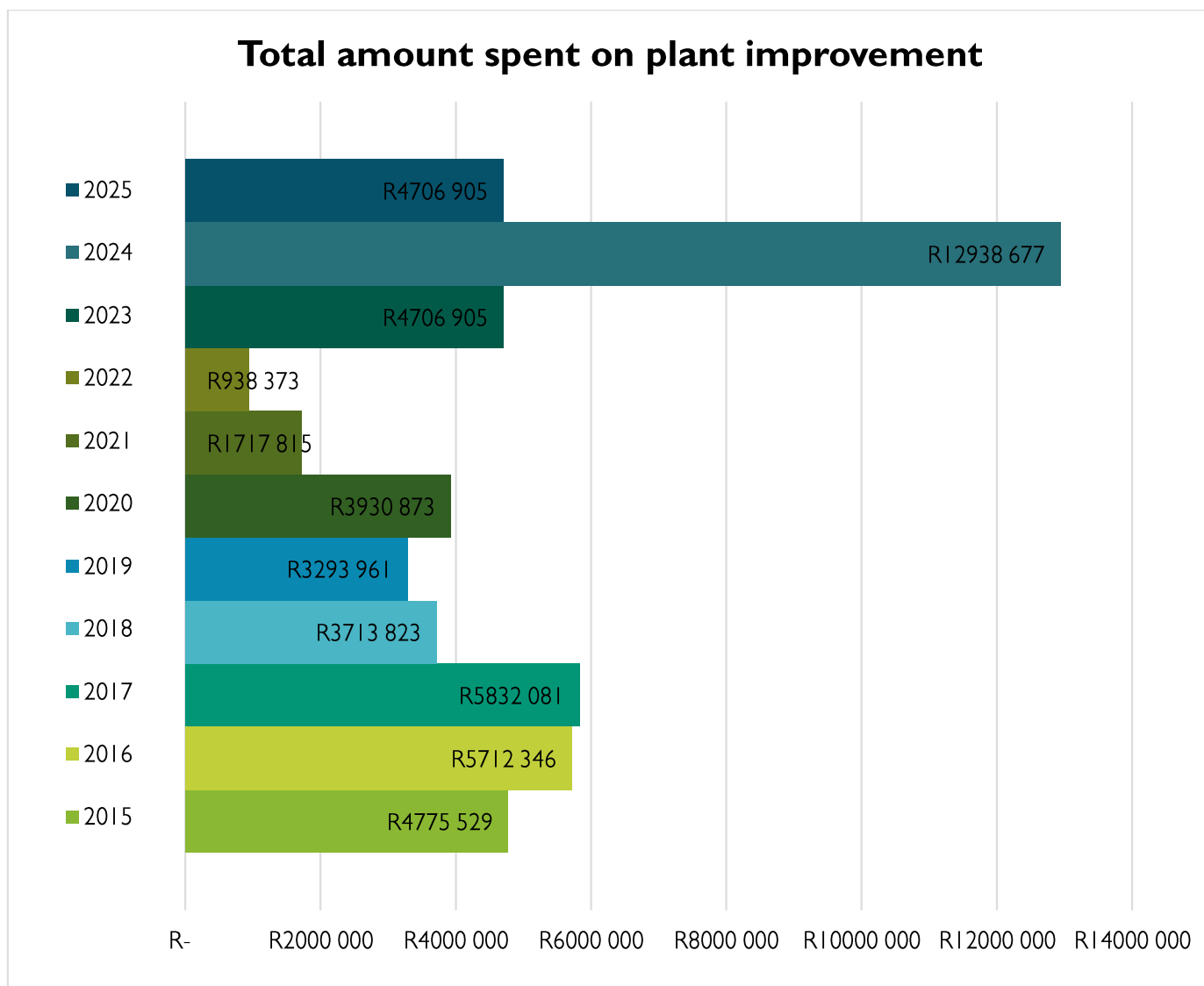
FIGURE 8: LEVY FUNDS SPENT ON QUALITY CONTROL OVER THE PAST 10 YEARS



Quality control:

The function of quality control is mainly undertaken by the cotton, dairy, lucerne, pork and red meat industries to ensure that consumers have peace of mind when using their products. Approximately **R39.4 million (3.3% of total levy expenditure)** was spent on quality control in the 2025 survey.

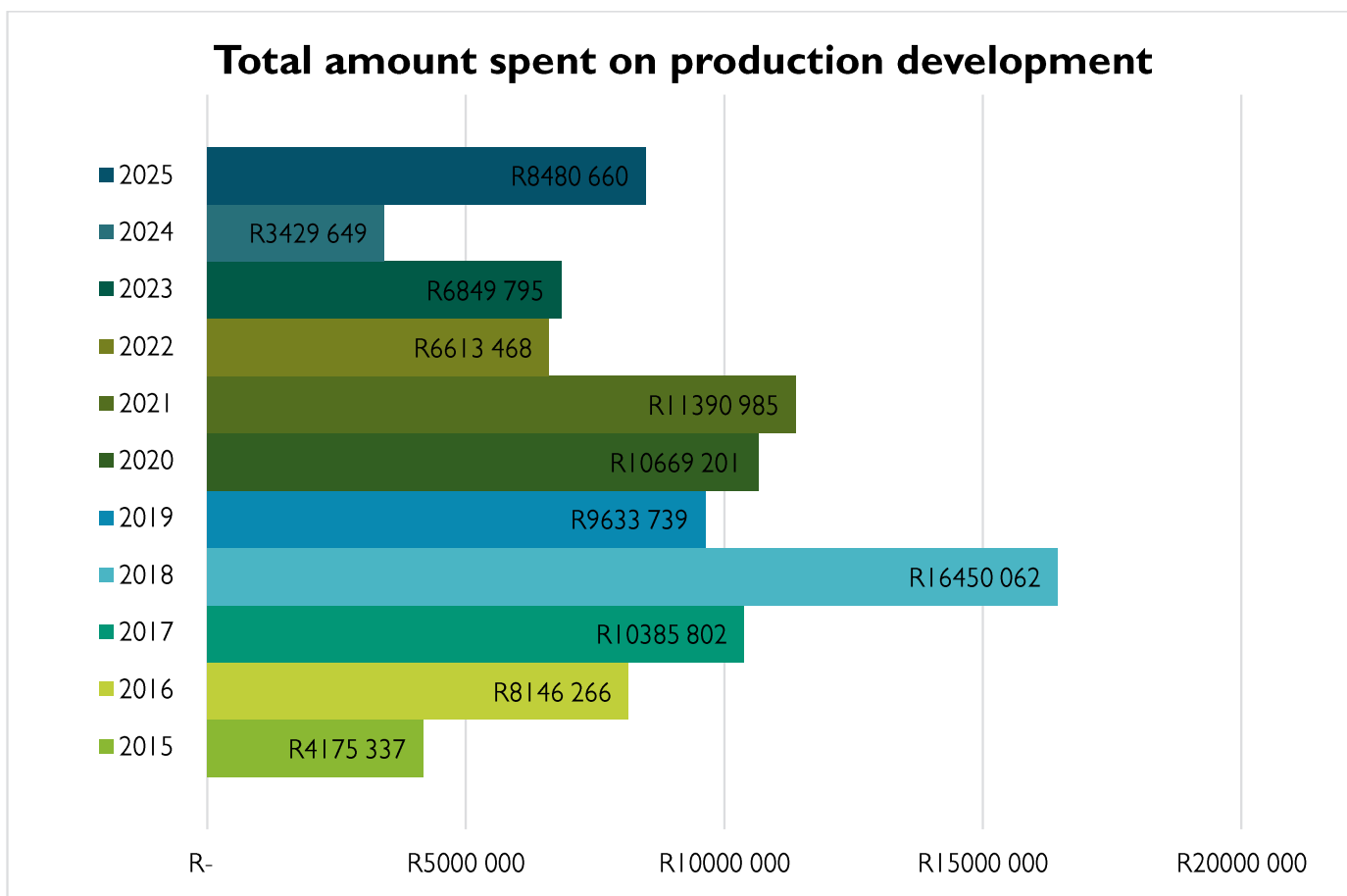
FIGURE 9: LEVY FUNDS SPENT ON PLANT IMPROVEMENT OVER THE PAST 10 YEARS



Plant improvement:

The deciduous fruit industry spent approximately **R4.7 million (0.4% of total levy expenditure)** on plant improvement in the 2025 survey, compared to R12.9 million in the previous survey. As production and marketing challenges increase, programmes need to keep abreast with the latest developments resulting in increased need for plant improvement to ensure that producers can competitively produce a product and are able to supply the maintain market access to existing markets and gain access to new markets.

FIGURE 10: LEVY FUNDS SPENT ON PRODUCTION DEVELOPMENT OVER THE PAST 10 YEARS



Quality control:

Only a small percentage (0.7%) of statutory levy expenditure (R8.5 million) was allocated to production development in the red meat industry.



2.5. INDUSTRIES' VIEWPOINTS ON STATUTORY MEASURES

The various industries concerned were requested to give their opinion on how statutory levies supported the viability of the relevant agricultural sectors. The following were noted:

Citrus export industry:

- The levy enabled the funding of research and technical support services for the citrus industry;
- Enabled CGA to retain access to existing markets and develop new markets for citrus exports. Funded various transformation initiatives such as Black Grower Enterprise Development and Human Capital development;
- Funded the collection, analysis and provision of industry information to citrus growers. Also provided industry statistics to growers; and
- Funded various logistics projects such as road to rail, working with Transnet to improve efficiencies at ports. The levy also funded a shipping project to investigate shipping costs and how these may be reduced.

Cotton industry:

- The statutory measures assist the industry to collect, process and distribute essential information regarding cotton.

Deciduous fruit industry:

- The levies assisted the industry to create stability in a highly volatile/uncertain environment and assisted the industry to address pertinent challenges as well as a funding mechanism to be able to address these challenges and issues in a responsive and pro-active manner.
- Organized industry and industry structures at all levels throughout the value chain contributed to better industry engagements and collaboration with relevant members and stakeholders to ensure cost-effective and efficient implementation of the various industry support programmes that are aligned with the needs and industry challenges which individual producers/stakeholders cannot address by themselves.
- Many of the research programmes extend over several years. As production and marketing challenges increase – the funded research programmes need to keep abreast with the latest developments resulting in increased need for research to ensure that producers can competitively produce a product and are able to supply and maintain market access to existing markets and gain access to new markets.
- The industry experienced many challenges over the last number of years regarding existing market access. The biggest impact has been on the implementation of risk mitigation measures especially on the phytosanitary side with many of the industry's existing markets becoming special markets that require a different approach (phytclean, FCM, Codling moth, Fruit Fly, etc). These pose a real risk to the SA industry in terms of market access. Through the levy the industry was able to effectively mitigate these risks. Some success stories are the regaining of access to Taiwan, in-transit cold steri to India, China opening for apples and pears, USA exports of stone fruit. The levy provides the industry with resources to continue to support new entrant businesses and to grow the industry in an inclusive manner. The levy contributions targeted businesses that were in distress due to the poor economic situation of the previous number of years in order to restore stability to these businesses. It also facilitated the planting of an additional 25 hectares of new orchards. Hortfin – established as an innovative and comprehensive funding

mechanism to finance the industry value chain applications that is majority black-owned. A total of 25 projects were approved with a loan book of R464 million, and which created 66 new permanent jobs and 2425 new seasonal jobs and a further 56 individuals were trained.

- Levies also provided a platform to leverage additional funds towards the Hortgro Skills Accelerator programme which is done in collaboration with the Jobs Fund.
- Market information and statistics that ensured reliable and accessible access to critical industry information to all role-players in the industry to inform better decision making and guiding strategic planning of the industry.

Dairy industry:

- Timely and reliable market information enabled role-players to make important business decisions, especially as the current regulations facilitate publishing information on more product categories than previously.
- Crucial input could be made towards Department of Agriculture and Department of Health's proposed amendments to health and safety regulations pertaining to dairy, and to industry standards regarding animal health and welfare, issued by the SABS.
- Through monitoring of standards of dairy products and the necessary remedial action as well as consumer awareness programmes, the quality and safety of dairy products were upheld and the interests of the consumer promoted.
- Technical and scientific information could be exchanged internationally so that industry could remain on the competitive edge.
- Transformation: Black dairy entrepreneurs were supported in many ways on their way to commercialization; black Environmental Health Practitioners were guided in respect of the latest legislation and they played a major role in the upkeep of health and safety of dairy products on the shelves; and black health care personnel, especially in rural areas have been provided with educational tools and information about the role of dairy in balanced diets. Evaluation of official SETA-based learning material and continuous improvement thereof by dairy industry experts ensured that training remained relevant to the primary and secondary industry sector requirements, and that personnel in these sectors can graduate with official SETA learnerships in order to follow career paths.
- Research and Development mainly focused on challenges that are relevant to the viability of primary dairy industry sector.
- Milk SA was empowered to pay high level attention to Animal Health and Welfare. SABS standards in respect of the transportation of animals and the care of dairy calves were reviewed; Progress was made with protocols and policies in respect of the foot-and-mouth disease, in liaison with the Department of Agriculture and the red meat industry.
- Sustainability in the dairy industry in respect of all disciplines, including the environment, consumer requirements, animal health & welfare, social responsibility and empowerment, was addressed and documented.
- Expert input has been provided via the Agricultural Trade Forum in respect of the African Free Trade Agreement, other agreements as well as aspects to enhance and promote fair trade.
- The statutory measures also enabled the dairy industry to ensure that its interests are protected and promoted via participation in various forums such as the Agriculture and Agro-processing Master Plan.

Fynbos:

- The levy provided a steady, predictable income so that long-term projects could be initiated and funded. Long-term support and relationships are also essential for new farmer development in the industry.

- It remains a challenge to get the data from all the relevant role-players timeously but with persistence and perseverance all data is eventually collected. Previously, the industry also experienced challenges with regards to project management and interestingly, the industry increased the management capacity which resulted in more projects being initiated and reserve funds being allocated and spent.
- The statutory measures helped the industry to conduct research to address technical issues; to collect information about production and export so that better planning could be performed; to market fynbos as a premium product for which a premium price should be paid; and to negotiate with various entities as a united front.

Lucerne:

- Research and Development: Statutory levies have funded the continuous improvement of the National Lucerne Trust (NLT) calibration system, increasing its robustness. Due to the accuracy of the grading system, it is accepted in various export countries.
- The NLT is the administrator of the National Lucerne Variety Evaluation Trials (NLET). The trials are conducted in conjunction with Provincial Departments of Agriculture, Land Reform and Rural Development (DALRRD). The aim of the NLET is to provide the South African lucerne industry with independent, replicated, comprehensive, accurate and accessible results on the performance of lucerne varieties.
- Market Promotion: Since the industry has a grading system it has stimulated the consumption and sale of lucerne products both domestically and internationally. The industry has specifically been involved with the opening of the export market in China.
- Skills Development: Statutory levies were used for training programmes and workshops for farmers, helping them to improve their skills and adopt modern and efficient agricultural practices.

Macadamias:

- Statutory levies have played a pivotal role in supporting the growth, sustainability, and global competitiveness of the industry. These levies enabled critical functions such as research and development, market development (both local and international), transformation and information dissemination. Additionally, they facilitated inclusive growth by funding transformation initiatives aimed at empowering emerging growers and ensuring broader participation. Collectively, these efforts enhanced productivity, market access, resilience, and the long-term sustainability of the industry.

Breeding levies on soybeans, lupins and winter cereals:

- There is an interest in new entrants in the market and this is reflected in the new markets. The new varieties registered since 2018 are as follows: wheat 65, soybean 129, oats 5, barley 4, and lupins 1. There are 13 soybean seed companies and 5 wheat seed companies. In addition, a new soybean technology namely, INTACTA RRPro, has also been approved, launched and commercialized.

Pomegranates:

- The statutory levies assisted the industry to maintain current export markets and to develop the local market. It also assisted producers by making available technical information to improve production and improve quality of fruit. New producers were assisted by experts to proceed to commercial production.

Pork:

- Contribution to the positive economic performance within the agricultural sector.
- Annual increase in the number of pigs slaughtered, which is a result of improved production efficiencies informed by advanced farming practices. This ensures the availability of sufficient protein at an affordable price.
- Poverty Relief and Social Responsibility Partnerships: Support of food security and culinary education for disadvantaged communities through provision of regular pork-based meals and upliftment of community nutrition.
- ESG – Engagements and research underway to create a sustainability framework for the pork industry. Facilitate the alignment of existing frameworks and sustainability considerations by identifying existing sustainability standards and frameworks in the South African finance industry as well as in the pork industry.
- Market access – improvement of carcass quality for smallholder black farmers through development programmes. This granted an opportunity for these farmers to participate in the formal market, because of the improved product quality.

Potatoes:

- Statutory levies have supported the Research and Development Unit in achieving optimal efficiency in research and innovation concerning enhancing yield potential, mitigating risks associated with pests and diseases; and alleviating constraints related to nutrition and irrigation. Furthermore, promoting bio-security measures for potatoes (PEPRSV).
- Statutory levies facilitated the research programme's focus on upcoming challenges confronting the potato industry, such as soil health, water efficiency, escalating input costs, and heightened pressure on crop protection solutions and fertilizers. In order to attain sustainable growth, a research strategy is employed to prioritize research focus areas according to the needs of growers.
- Statutory levies assisted the Marketing Unit to focus on its objective to increase the per capita potato consumption by One Potato per week. The focus is to move potatoes into the main (informal) market which represents the average South African consumer in the lower to middle class income segment. Potatoes do offer an affordable source of good nutrients and the per capita consumption growth from 35 – 40 kg per person is targeted.
- Statutory levies enabled Industry Information Services to supply timely, accurate and relevant market and production information and business intelligence to all stakeholders in the South African potato value chain, but also to other role-players who have an interest in agriculture.
- Statutory levies have allowed the Transformation Unit to support the formation of commercial Black potato producers, with the primary focus over the last five years being on Enterprise Development. Assistance was provided in setting up, supporting and growing viable new Black owned potato producing enterprises by providing services that include strategic farm business planning, technical support and seed supply.
- • Apart from the Enterprise Development Programme, statutory levies enabled the offering of Small Grower Development Programmes, Farm Based Training and coordination of the Tertiary Skills Development Programme.

Table eggs:

- The levies have assisted the industry in developing a long-term strategy, conducting research on key issues that affect the industry, including generic functions to encourage the demand for eggs. The industry was able to meaningfully contribute towards our transformation commitments.

Table grapes:

- SATI provided valuable information and services to farmers that supported on-farm decision making and implemented a market development campaign in China and Vietnam to promote South Africa as a reliable supplier of quality table grapes and promote the SA brand.
- BBBEE initiatives were supported through enterprise development projects, training initiatives and advisory services, including young black people were supported to further and, in some cases, complete their tertiary education.
- In collaboration with Government, new markets were negotiated, and existing markets were retained and maintained.
- Conduct critical research to support the industry's competitiveness and sustainability.
- Contribute to viable solutions to the logistical challenges faced in previous years through the development of the Prescriptive Logistics Model and industry driven engagement with relevant role-players including Transnet and shipping lines.



3. CONCLUSIONS

This report on the status of statutory measures, compiled by the NAMC for submission to the Minister, focuses only on the various levies collected by the 21 agricultural industries concerned, including the activities funded by statutory levy income.

The agricultural sector is expected to ensure food security, to strengthen the economy and to promote social wealth by providing job opportunities in rural areas. These aims can be reconciled with the provisions of section 2(3) of the Act. It is evident from the viewpoints listed by the various industries that the objectives mentioned cannot be achieved without the implementation of statutory measures and specifically statutory levies.

Statutory measures, and specifically levies, play an important role in enabling growth in the relevant agricultural industries through effective information management and communication and the collection of funds to finance much-needed functions. The levy administrators' total funds collected through statutory levies in the 2025 survey amounted to approximately R1.155 billion, which is 0.52% higher than R1 149 billion reported in the 2024 survey.

The 2025 survey shows that approximately R1.210 billion was spent on industry functions, which represents an increase of 4.8% compared to the R1.106 billion expenditure in the 2024 survey. Of the total expenditure, about 46.7% was spent on research, 13.0% on export promotion/market access, and 6.4% on information. About 19.7% (R237.5 million) was spent on transformation projects. This represents an increase of 5.0% spending on transformation intervention compared to the previous year.

In general, the administrators of statutory levies met the condition of approval of these levies, namely that not more than 10% of levy income may be spent on administration and that at least 20% of levy income must be spent on transformation. The NAMC further noted that levy administrators handled levy income and expenditure in a responsible manner as all administrators obtained unqualified audit reports.

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

The NAMC wishes to thank the statutory measure administrators who supplied the necessary information, as well as the Minister's Office and Department of Agriculture for their efficient assistance in the processing of applications for the implementation, amendment and continuation of statutory measures.

ANNEXURE A: CONTACT DETAILS OF LEVY ADMINISTRATORS

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South African Pork Producers' Organisation	Dr Marlene Louw T 012 100 3035	Ms Kgadi Senyatsi T 012 100 3035 Cell 073 861 3588 kgadi@sapork.com
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Potatoes SA	Mr Willie Jacobs T 012 349 1906 F 012 349 2641 monica@potatoes.co.za	Rendani Murovhi T 012 349 1906 rendani@potatoes.co.za

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