



CHAIRMAN'S REPORT 2023/24

Presented by Anina Hunter at AFMA's
77th AGM hosted at Cathedral Peak Hotel
on 6 September 2024



Contents

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at the top of every page:

-  Contents page
  Next page
 Back
  Previous page

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Message from AFMA Chairperson 3

1. Introduction 4

2. AFMA Strategy for 2025 5

3. The Animal Feed Situation 7

Global feed supply 7

Domestic feed supply 8

Raw material utilization 8

AFMA feed sales 2023/24 10

National feed sales 2023/24 10

4. Trade Committee Matters 14

Strategic focus areas 14

Other trade matters 15

5. Technical Committee Matters 16

Strategic focus areas 16

Monitoring of undesirable substances 17

6. Regulatory Committee Matters 18

Strategic focus areas 18

Act 36 Farm feed regulation amendments 18

Feeds and Pet Food Bill 19

CMR substance prohibition 19

Industry self-regulation 20

AFMA Code of Conduct 20

AFMA Transport Protocol 20

AFMA Early Warning System (EWS) 20

7. Training and Skills Development Committee Matters 21

Strategic focus areas 21

Other training & skills development matters 22

AFMA Awards 22

8. Marketing & Promotion Matters 24

Events 24

AFMA Annual and General Meetings 27

Digital communication channels 28

AFMA website and microsites 28

Member Update 28

Social media 28

Print media 28

AFMA Matrix 28

9. AFMA Membership 29

New members 29

Renewal of AFMA membership 29

10. Staff Matters 30

11. Acknowledgements 31



Message from AFMA Chairperson



Anina Hunter
AFMA Chairperson

The AFMA Annual General Meeting is always an opportunity to take a moment to pause and appreciate all our industry stakeholders for the unique contributions you all make to the industry. As we approach the close of another year, I would like to reflect on the journey we, as the Animal Feed Manufacturing Association of South Africa, have embarked upon. The year 2023-2024 has been one of profound challenges, resilience, and triumphs that remind us of the indomitable spirit of our people.

Since the end of 2023, global commodity prices have faced a bearish trend, yet domestic prices have held steady. The season, which began with much promise thanks to December rains, quickly turned challenging with the onset of extreme heat and dry conditions during critical production stages – courtesy of El Niño. Maize prices have shifted from Durban export parity to Cape import parity, while the local soybean crop has suffered a significant reduction of 1 million metric tons compared to the previous season. Soybean crush margins, once robust, have deteriorated, leading to a rally in local meal base prices. Despite these hurdles and the uncertainty surrounding the true size of the maize crop due to low delivery figures, we remain hopeful. We look forward to the possibility of La Niña bringing favourable rains and abundant summer crop supplies in the upcoming season.

The outbreak of avian influenza remains a stark reminder of the vulnerabilities in our agricultural sector, particularly within the poultry industry. The impact has been far-reaching, affecting not only poultry farmers but also our feed manufacturing sector, which is intricately linked to the health and productivity of our

nation's flocks. As an association, we have worked tirelessly to support our members through this crisis, advocating for stronger biosecurity measures, ensuring that affected farmers receive necessary aid, and promoting research into innovative feed solutions that could help mitigate the effects of such outbreaks in the future. This fight is far from over, but we remain committed to standing by our members and navigating these turbulent waters together.

Amidst these environmental impacts, we continue to face the persistent challenges posed by load shedding. The erratic power supply has tested our resilience and forced us to find innovative ways to keep our operations running. It is this perseverance and creativity that unite and bind us as an industry. While the national government grapples with its struggles, we have not allowed political uncertainties to deter us from our goals. Instead, we have risen above them, finding strength in our shared purpose and commitment to feeding our nation and beyond.

As we reflect on our industry's journey, we cannot overlook the recent successes that South Africa has enjoyed in the sports field. Whether it's rugby, cricket, soccer, or swimming our athletes continue to remind us of the power of dedication, teamwork, and the relentless pursuit of excellence. These victories are more than just wins on a scoreboard – they are a testament to the resilience and strength that define us as a nation. As we look to the future, let us draw inspiration from these achievements. Like our athletes, we too have faced adversities, yet we continue to prevail. Let us harness the power of AI responsibly, tackle the challenges of load shedding with ingenuity, and navigate the complexities of our national landscape with unwavering determination. Our strength, our resolve, and our capacity to triumph against all odds will ensure that together, we will continue to build an industry that not only survives but thrives, contributing to the success of our beloved country.

I cannot help but foster a deep sense of national pride and notice the remarkable display of mutual respect that I have experienced among the industry members. It's this spirit of comradery and encouragement that resonated with me. Without our suppliers, customers, and stakeholders we do not have a business. We need to constantly cultivate an environment that nurtures and supports our industry and ensures the advancement of our industry and ecosystem.

Thank you for your continued commitment and dedication to our industry.

Anina Hunter
AFMA Chairperson

1. Introduction

The vision of Animal Feed Manufacturers Association in South Africa is to promote and sustain an environment in which the animal feed industry can thrive, and consumers across the country and the continent have access to sufficient, affordable and nutritious animal protein to sustain a healthy living.

The dynamic animal feed thought leader influencing food security through partnerships with all stakeholders

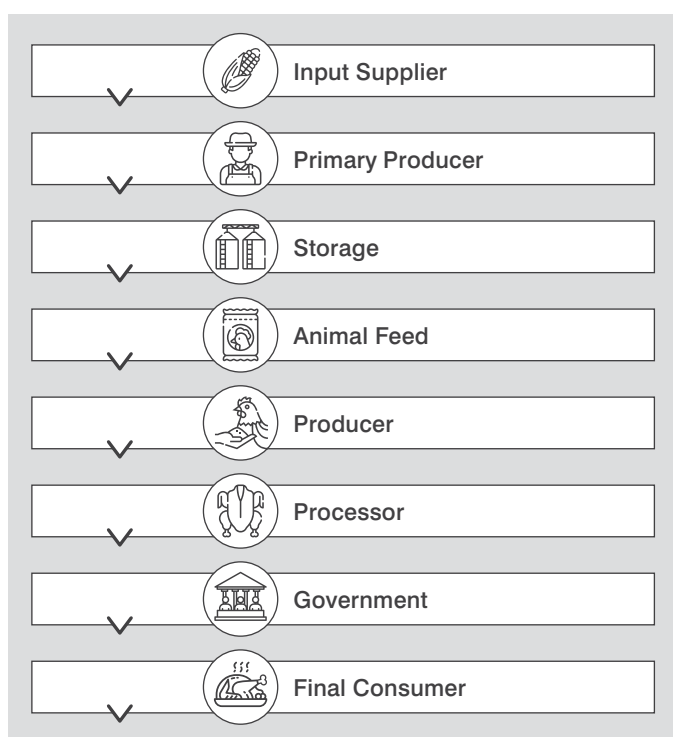
The feed industry is strategically positioned within the food value chain to lobby, liaise, and collaborate with government departments; regulatory decision-makers; parastatals; agricultural forums; academia; international agencies and related stakeholders in the value chain. Through healthy partnerships, open dialogue, trust and close cooperation with these entities, AFMA aims to unlock further growth in the South African agricultural value chain. Agriculture and agro-processing remains an important sector in South Africa, contributing a combined 7% of all formal economic activities in 2023, and 8% of the number of employed people in the country according to the latest BFAP Baseline report. This impact can further be unpacked to include up and downstream links in the value chain such as the

manufacturing of inputs, supply of services, trade and transport and ultimately results in a total contribution of the entire Agri-Food system of 13.7% to the economy.

Throughout the previous year AFMA actively represented the animal feed industry in various **grain & oilseed value chains** (Maize Forum and Steering Committee, Soya Value Chain, Grains and Oilseeds Value Chain Round Table, Crop Estimates and Liaison Committee), **livestock value chains** (Strategic Agricultural Inputs Forum, National Animal Health Forum), and other related entities in **transport, logistics and trade** (Transnet, ITAC, SARS, JSE, SACOTA, DTIC).

All animal feed in South Africa are regulated by the Department of Agriculture, Land Reform, and Rural Development (DALRRD) through the primary legislation of Act 36 of 1947 and therefore AFMA have committed its full attention and close collaboration with the Agricultural Inputs Control (AIC) division of DALRRD and the Registrar in this regard. Quarterly liaison meetings with the Registrar via the Animal Feed Forum (AFF), and with the technical advisors and admin officials via the Liaison Working Group (LWG) continued to facilitate a robust platform to share information and to keep abreast of developments within Government. The period ended on a high note with feed registrations being under control for the first time in a long time and no backlogs were experienced since August 2024. AFMA was instrumental in implementing an 'automated response message' in partnership with the farm feed officials at AIC that will improve both communication with registration holders and the efficiency of assessment within the division going forward. Towards the end of the period in August, however, the Registrar delegated all his powers and functions to Mr Gift Moncho, previous Head of Inspection services under Act 36 of 1947, and now also the acting Director for AIC. The next period should see a shift in focus towards implementation of the updated Regulations of Act 36, and the finalization of a modernized feed law impacting the day-to-day operations of feed businesses in the country. Read more about the Feeds and pet food bill in the section dealing with Regulatory matters.

Looking ahead, AFMA's vision and mission to increase food security, create a capable and enabling policy environment and improve access to food supply to bolster South Africa's competitiveness, is directly aligned with that of the Governments' **Agriculture Agro-processing Master Plan (AAMP)**. It is a culmination of work between government, business, labour, and community and requires public & private partnerships to achieve its vision and influence food security in South Africa. AFMA is active on the **Poultry Master Plan** to support our poultry farmers in being competitive in the provision of affordable animal protein to all consumers, and to facilitate a sustainable environment for future production.



2. AFMA Strategy for 2025

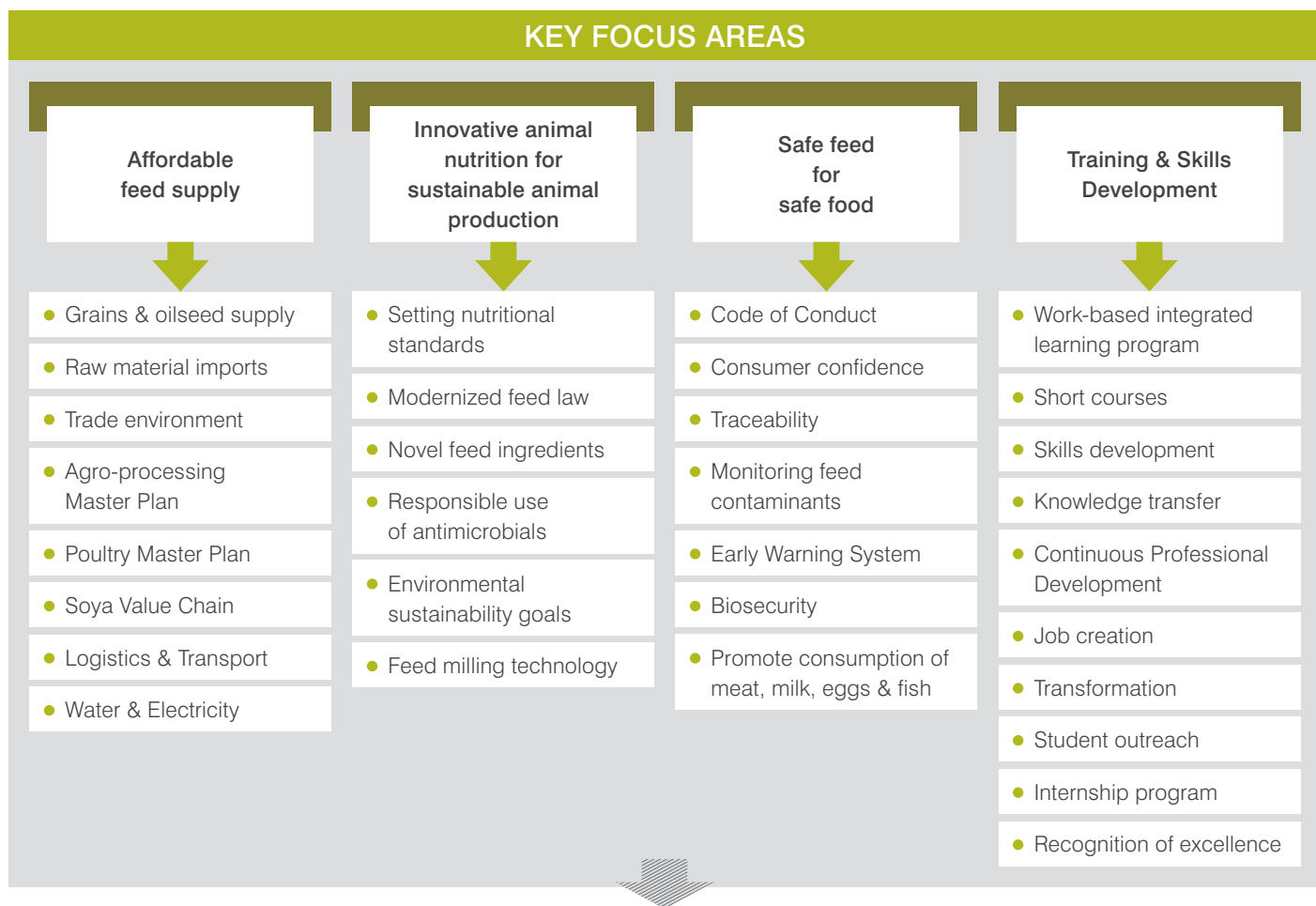
Liesl Breytenbach, AFMA Executive Director



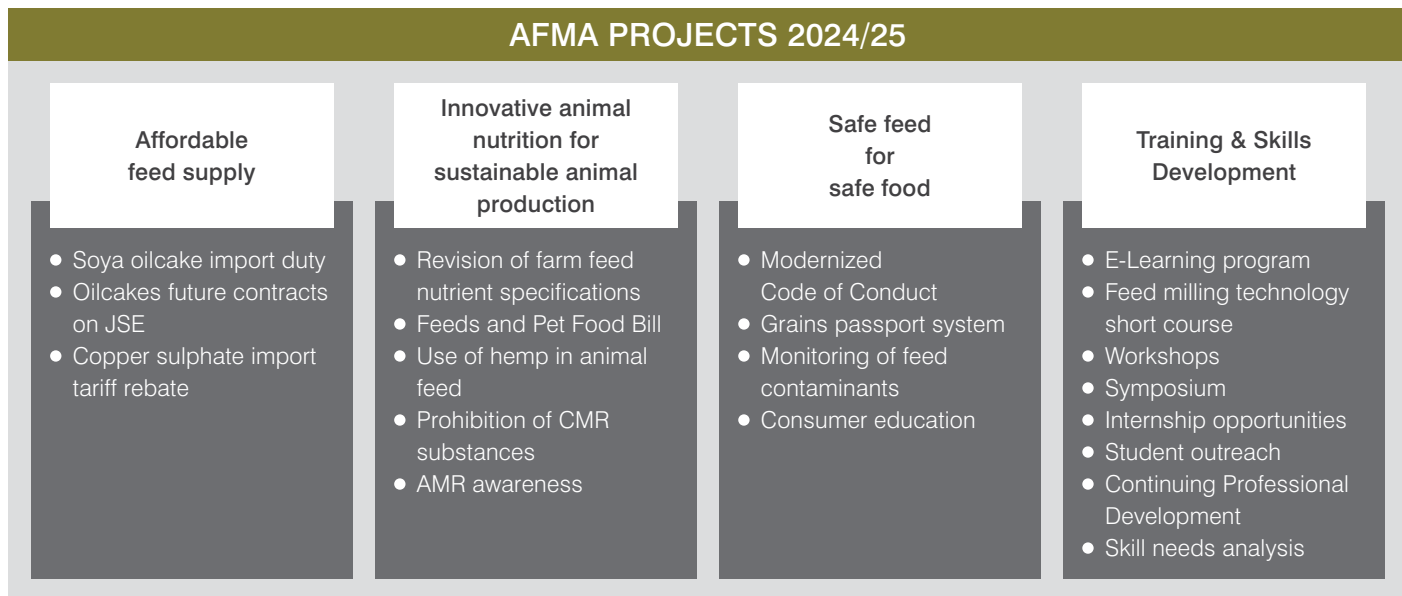
The AFMA Board of Directors confirmed the Associations' Strategic objectives for 2025 to be focused on:

- 1 Providing an affordable feed supply;
- 2 Enabling innovative animal nutrition for sustainable animal production;
- 3 Ensuring Safe food for safe feed through self-regulation; and
- 4 Enhancing training and skills development in the industry.

These **strategic pillars** form the cornerstone of AFMA outcomes for the year and guides its activities towards a common goal of unlocking growth in the agricultural value chain. AFMA endeavours to achieve this through (1) ensuring a consistent supply of sufficient and affordable animal feed for the production of meat, milk, eggs & fish; (2) using innovative nutritional strategies to produce nutritious animal feed in a responsible and sustainable way and within an enabling legislative framework; (3) promoting good manufacturing practices in the provision of safe feed to enhance consumer confidence, and (4) supporting job creation, training opportunities and skills development in the animal feed industry.



This year AFMA focussed on aligning its **Key Focus Areas** in support of the overall Strategic objectives and allocated specific projects to each of its Committees during a joint strat session in March 2024. The **Committee projects** aim to compliment and support the Key Focus Areas and achieve AFMA's overall Strategic objective. It is worth noting that committee projects have been prioritized by the members to ensure focused attention and effective outcomes.



A more detailed report on each of the priority Committee projects are available within the respective Committee sections in the Chairman's report.

3. The Animal Feed Situation

The global animal feed market is an important part of the agriculture and livestock industry that caters to the nutritional needs of a variety of animals such as poultry, pigs, cattle, aquaculture, etc. Over the last decade, the market for animal feed has grown dramatically due to the growing world population, the availability of high incomes and changing dietary habits. People’s desire for a high-protein diet has increased the demand for animal products, which has led to an increase in demand for animal feed. Therefore, the future outlook for the animal feed market is likely to continue to grow due to the increasing global demand for animal products. Opportunities for innovation in feed formulation, sourcing and production will arise as the industry faces issues related to sustainability and regulatory compliance.

3.1 Global feed supply

Livestock farming and the consumption of animal protein contribute significantly to the economic and nutritional well-being of millions of people around the world. Animal feed is the largest and most important component in ensuring safe, abundant and affordable animal protein. Global commercial animal feed production generates an estimated annual turnover of 400 billion US dollars. The sale of manufactured feed takes place in more than 130 countries and directly employs more than a quarter of a million workers. **Figure 1.1** illustrates the world’s leading producers of animal feed in 2023. China, the USA, Brazil, India, Mexico, Russia, Spain, Vietnam, Japan and Türkiye are the top 10 countries producing animal feed worldwide

in 2023. It was evident that in the 2022 period, Argentina and Germany were in the top 10, replaced by Japan and Turkey in the current period. Countries such as China (0.8%), Brazil (1.8%), India (13.4%), Mexico (0.01%) and Russia (3.8%) have recorded a positive growth rate between 2022 and 2023, while the remaining countries have seen a decline in feed production.

On a regional level, **Table 1.1** clearly shows **Asia-Pacific** as the largest feed producer in the world, recording an increase of 6.54 million tonnes (1.45%). Growth in feed production in the region’s ruminant sectors offset a setback in the aqua sector. Feed production in **Latin America** grew by 1.24% in 2023, despite high production costs, geopolitical tensions and economic reasons affecting the region. It continued to lead global growth, mainly due to the export-driven aquaculture, poultry and pork markets. The **Africa** region saw sustained but slower growth with an increase of 1.95%, while **Oceania** recorded the third highest growth at 3.71%. Europe, North America and the Middle East, on the other hand, continued their downward trend. In **Europe**, beef production contributed significantly to the downward trend, recording a decline of 3.82% in 2023. **North America** recorded a decline of 2.8%, with beef feed production falling significantly. The pig and dairy sectors also declined slightly, while the broiler, layer and pet sectors saw some improvements. While the Asia-Pacific region is still in first place, North America (USA and Canada) has overtaken Europe in terms of total feed

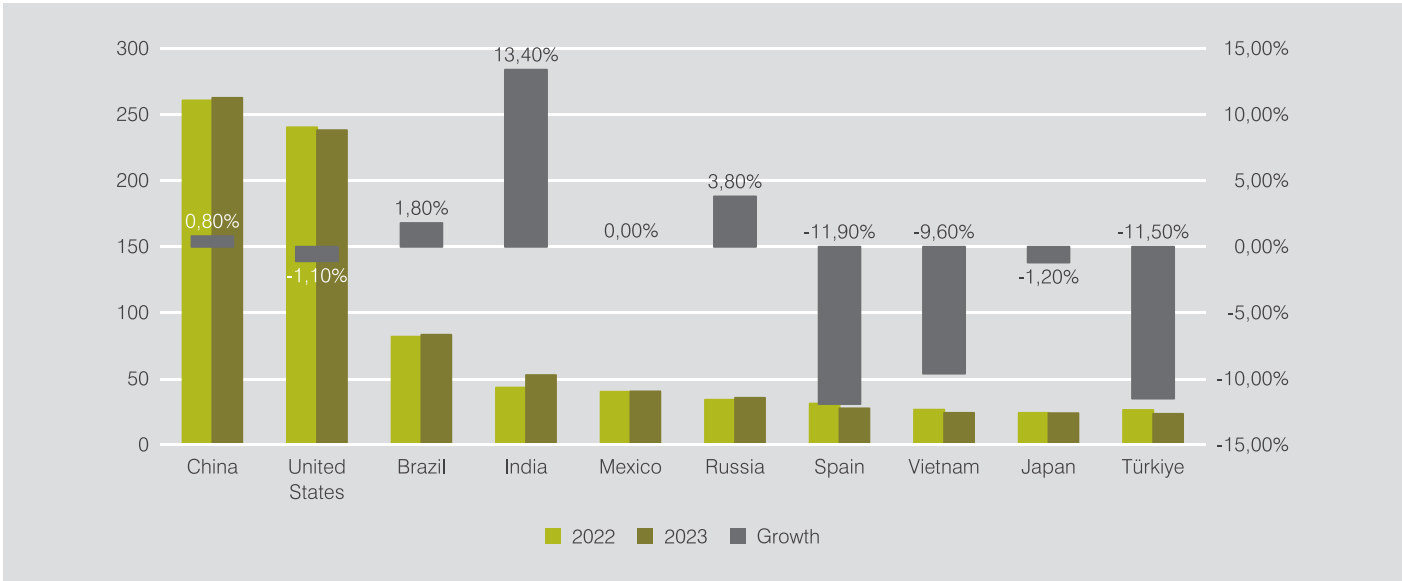


Figure 1.1: Global feed production ranking – 2023
Source: Alltech – 2024

Table 1.1: Total feed production per region – 2023 ('000 Tons)

Region	Broiler	Pig	Layer	Dairy	Beef	Aqua	Pets	Equine	Total
Africa	17,33	3,88	8,65	5,33	5,13	1,58	0,82	0,44	43,16
Asia-Pacific	160,67	138,72	80,4	25,23	16,08	35,7	2,51	0,38	459,69
Europe	54,25	72,61	30,98	38,76	15,47	4,63	10,97	2,07	229,74
Latin America	74,33	41,88	27,16	20,63	14,72	7,17	8,67	0,76	195,32
North America	61,85	62,39	15,7	28,2	63,25	1,78	11,34	3,77	248,28
Middle East	12,54	0,01	6,94	6,62	2,12	1,02	0,11	0,12	29,48
Oceania	4,09	1,33	1,04	1,46	0,72	0,22	0,54	0,43	9,83
Total	385	321	171	126	117	52	35	8	1 216

Source: Alltech – 2024

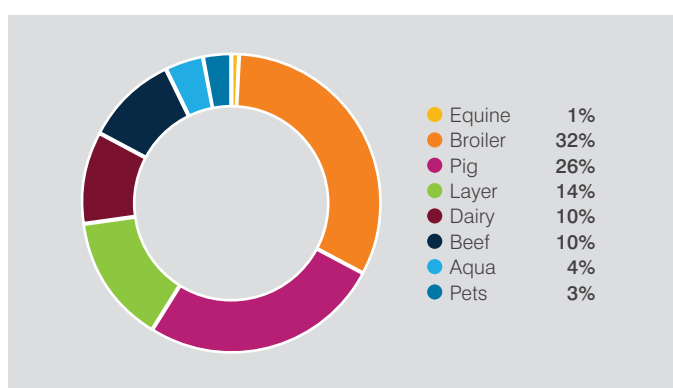


Figure 1.2: Global Feed Production by Species – 2023

Source: Alltech – 2024

global feed production. Pig feed takes overall second place in global feed production with a share of 26%. The Asia-Pacific region once again stands out with 138.7 million tons of pig feed production, followed by Europe with 72.6%. Global production of dairy cattle feed reached 126 million tons in 2023 with a share of 10%. Europe and North America have the largest share of global dairy cattle feed production, with production of 38.8 and 28.2 million tons respectively. Beef feed production reached 117 million tons with a production share of 10%, with North America being the main producer of beef feed with around 63.3 million tons. The production of aqua feed, pet food and horse feed accounted for 4%, 3% and 1% respectively in 2023.

3.2 Domestic feed supply

In 2023, African animal feed production reached 43.16 million tons, representing the second largest global increase of 1.94% behind that of Oceania (3.71%). Overall, the African industry is driven by a strong increase in broiler feed production, particularly due to the replenishment of poultry flocks affected by avian influenza in South Africa, the continent's leading producer. This segment recorded record growth of almost 21% year-on-year to 17.3 million tons. In contrast, the production of layer feed fell by 10.82% year-on-year (the sharpest decline worldwide) to 8.6 million tons, due to lower demand and higher raw material prices. The South African poultry industry is still recovering from a major outbreak of highly pathogenic

avian influenza in 2023 and relatively high commodity prices, which will prevent significant investment to expand broiler and feed industry capacity in the near future, so a major increase in feed demand for maize in South Africa is unlikely.

3.2.1 Raw material utilization



<https://www.afma.co.za/industry-statistics>

Fluctuations in commodity prices may affect the profitability of the industry as well as the prices and production of compound feed in the coming decade. The availability of commodities depends on their yields, which can be affected by seed biotechnology, changing weather patterns and use of fertilizer and pesticides. This can lead to higher production costs and potentially lower market demand. Maize is the most common ingredient in animal feed production with an inclusion rate of 51.5%, followed by oilcake at 20.59% and fishmeal at 0.12%.

Local commodity prices have shifted from export parity to import parity, following the CME prices. The coming harvest in South Africa is expected to be smaller than in the previous year with estimates ranging between 13 and 13.5 million tons, compared to 17 million tons in 2023. While this should be sufficient to meet local demand, any exports to neighbouring countries could put pressure on local stocks and keep prices in Cape Town at import parity.

Figure 1.3 shows the raw material usage for feed production between 2022/23 and 2023/24 and indicates a significant decrease of 346,302 tons. This deviation in the use of raw materials indicates changes in feed and market dynamics in supporting livestock production. The factors affecting local commodity costs need to be carefully considered as feed prices can vary depending on the commodity item. Discounts on local soybean meal can strongly influence feed mill purchase prices, which affects overall soybean meal prices. Other costs such as production costs, transportation costs, grinding losses, interest and additional processes such as pelleting, bagging and fat coating also contribute to raw material prices.

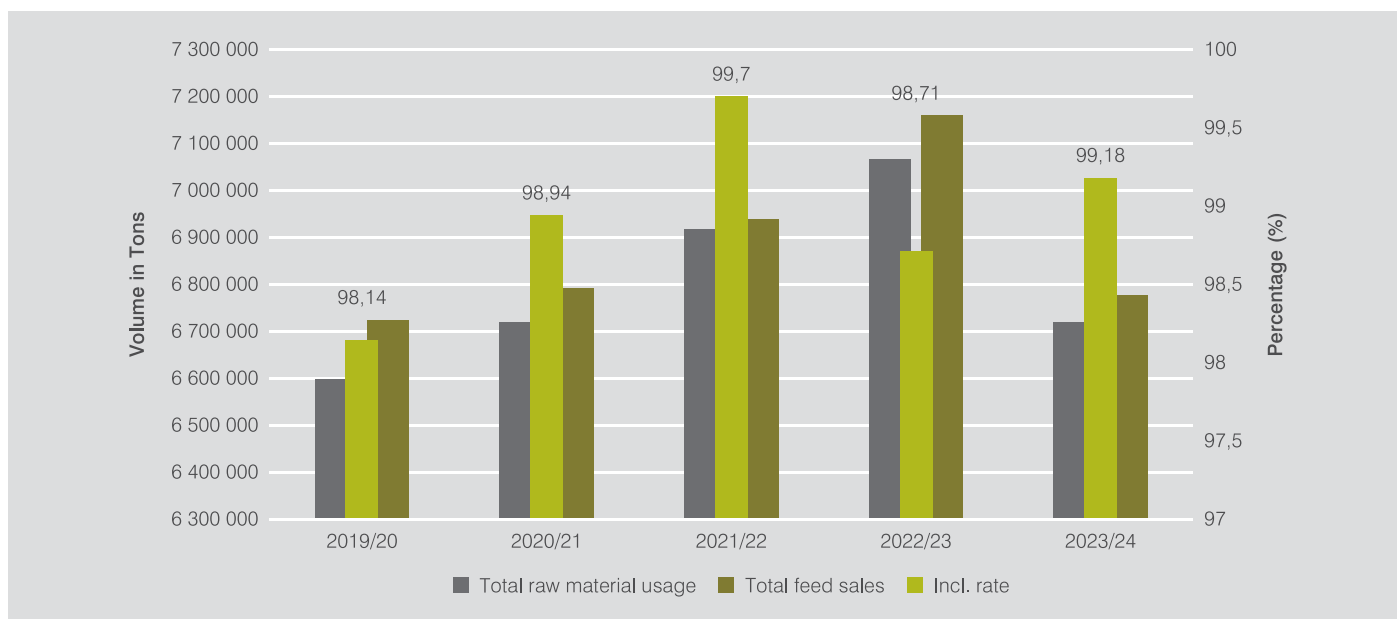


Figure 1.3: Raw material usage (April 2019 – March 2024) – AFMA Members (Tons)

Source: AFMA feed sales statistics – 2023/24

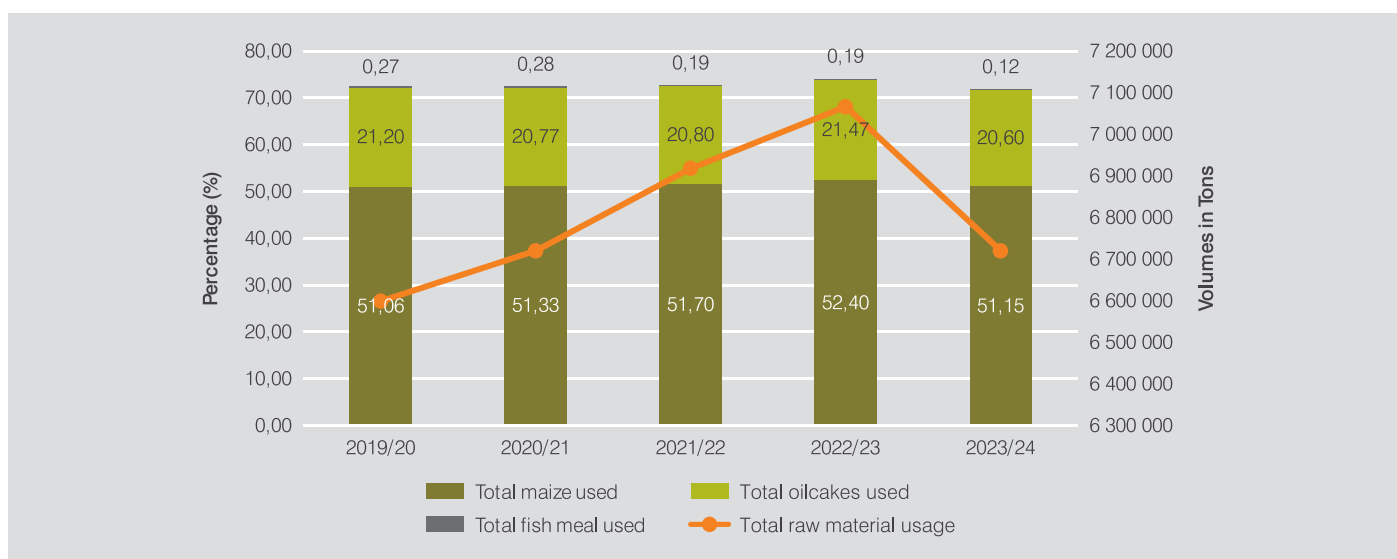


Figure 1.4: Usage of maize, oilcake and fishmeal by AFMA Members

Source: AFMA feed sales statistics – 2023/24

Maize products, oilcakes and fishmeal

The South African fishmeal and oilcake industry plays an important role in livestock farming and aquaculture. Fishmeal, which is mainly derived from sardines and anchovies, is a protein-rich ingredient that is often used in animal feed formulations. Oilcakes, e.g. from soybeans, sunflowers and rapeseed, are also important sources of protein and energy for livestock and poultry. **Figure 1.4** illustrates the use of fishmeal and oilcake by AFMA members in animal feed production in the period 2019/20 to 2023/24. Both the use of fishmeal and oilcake by AFMA members decreased by 0.07% and 0.87% respectively in 2023/24 compared to 2022/23. The decrease is mainly due to the reduced demand for poultry feed, which has seen a

significant downward trend due to the impact of HPAI on broiler numbers.

The South African maize harvest in the 2023/24 marketing year is affected by a mid-summer drought caused by El Niño, leading to an expected decline in harvest volume of more than 15%. The drought also affects other countries in Southern Africa and leads to a positive outlook for local maize prices, which will lead to an expansion of the maize area in the 2024/2 marketing year. **Figure 1.4** above shows various maize products used by AFMA members in the period 2019/20 to 2023/24. In the period 2023/24, AFMA members used 3.4 million tons of maize products, which corresponds to 51.15 % of the feed share. The share of

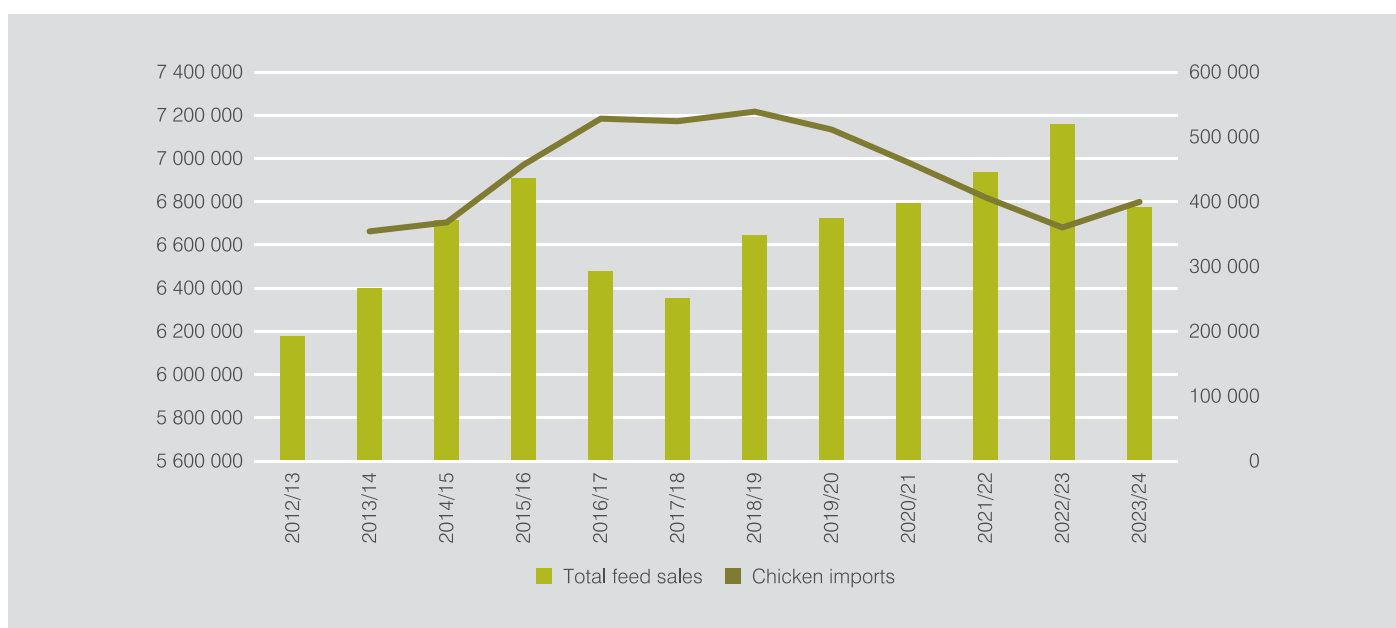


Figure 1.5: Total AFMA feed sales vs chicken imports (Tons)

Source: AFMA feed sales statistics and quantec easy data – 2023/24

corn was reported at 47.68%, followed by hominy chop (1.6%) and corn gluten meal at 20% (1.01%).

3.2.2 AFMA feed sales 2023/24



<https://www.afma.co.za/industry-statistics>

The poultry industry is struggling with imports from international countries, especially Brazil. There is a risk that higher imports and more dumping could lead to an oversupply on the local poultry market in the future and thus depress prices. However, the South African market is protected to a certain extent from imports from the major poultry exporting countries by tariffs that act as a barrier. In January 2024, the DTIC together with the ITAC announced the decision to introduce discounts on boneless and non-deboned chicken parts. The decision provided for a 25% discount on bone-in chicken cuts and a 30% discount on boneless chicken meat if there is a shortage of chicken meat. This decision was intended to avoid a shortage of chicken meat after poultry in South Africa was affected by one of the worst outbreaks of avian influenza in 2023. Therefore, the import of chickens to South Africa has a negative effect on the production of animal feed (see **Figure 1.5**). It is evident that the increase in chicken imports from 360 252 tons in 2022/23 to 399 702 tons in 2023/24 caused the decrease in feed production by 382 318 tons.

According to Alltech's Agriculture and Food Outlook, the global feed tonnage will be around 1.29 billion tons in 2023, a slight decrease of 0.2% compared to the previous year. The protein sector is facing challenges such as disease outbreaks, economic uncertainties affecting purchasing power and changing consumer dietary

preferences. In South Africa, feed production decreased by 5.3% (compared to the previous year) due to the outbreak of avian influenza in the poultry industry. The South African Poultry Association reported a significant decrease in the consumption of breeder feed (1.4%) and layer feed (11.8%), while the consumption of broiler feed (5.6%) increased slightly. **Figure 1.6** on the next page shows the development of feed production by AFMA members compared to the previous year. Year-on-year, total sales of animal feed fell by 5.3%, with poultry feed accounting for most of this decline.

Feed sales per province are shown in **Figure 1.7**. The reported data for the provinces relate to AFMA members, which account for approximately 60% of national feed sales. The table shows that the Western Cape led the way with a share of 19.77%, followed by Mpumalanga and Gauteng with 15.12% and 14.79% respectively. Free State contributed 14.63% of total provincial feed production, followed by North West (9.07%), Eastern Cape (7.66%), SADC (4.04%) and finally Limpopo Province (1.88%).

3.2.3 National feed sales 2023/24

National animal feed production plays a crucial role in supporting livestock industries and ensuring food security. Efficient animal feed production not only enhances animal health and growth rates but also contributes to the sustainability of agricultural systems. **Table 1.3** looks into AFMA's contribution towards the national feed production during the 2023/24 period. Therefore, it is reported that AFMA contributed a total of 57,89% on national feed production, which is a drop by 1.79% when compared to 2022/23 period. Importantly, it is evident that AFMA produces 99.66% and 82.76% of the broilers and layers national feed production.

**DAIRY FEED**↑ 4,3%
GROWTH

2023/24 956 411

2022/23 917 388

**DOG FOOD**↑ 71,6%
GROWTH

2023/24 1 589

2022/23 926

**BEEF & SHEEP FEED**↑ 1,2%
GROWTH

2023/24 830 778

2022/23 820 647

**BREEDER FEED**↓ -10,4%
GROWTH

2023/24 558 044

2022/23 622 948

**PIG FEED**↓ -2,4%
GROWTH

2023/24 444 022

2022/23 455 146

**GAME FEED**↑ 17,4%
GROWTH

2023/24 23 135

2022/23 19 703

**LAYER FEED**↓ -16,5%
GROWTH

2023/24 781 889

2022/23 937 128

**AQUACULTURE**↑ 2,2%
GROWTH

2023/24 9 111

2022/23 8 917

**BROILER FEED***

*Graph not to scale

↓ -5,8%
GROWTH

2023/24 2 975 828

2022/23 3 158 345

**OSTRICH FEED**↓ -39,3%
GROWTH

2023/24 5 997

2022/23 9 877

**HORSE FEED**↓ -0,2%
GROWTH

2023/24 23 505

2022/23 23 551

**OTHER FEED**↓ -13,3%
GROWTH

2023/24 11 392

2022/23 13 144

Figure 1.6: AFMA seed sales from 2022/23 to 2023/24 (April-March) (Tons)

Source: AFMA STATS – Only AFMA members

		Western Cape	Eastern Cape	Free State	Gauteng	KZN	Limpopo	Mpumala- langa	North West	SADC
	Total Feed Share	20	8	14	15	13	2	15	9	4
	Dairy Feed	39	24	7	2	23	0	3	2	0
	Beef & Sheep Feed	14	3	13	1	28	0	35	2	4
	Pig Feed	31	5	27	8	5	0	13	8	3
	Layer Feed	15	3	26	26	7	1	11	9	2
	Broiler Feed	16	6	15	20	8	3	14	14	4
	Horse Feed	7	2	0	54	1	17	15	0	4
	Maize-Free Feed	14	2	16	8	3	0	49	8	0
	Breeder Feed	16	5	7	20	21	0	9	7	15
	Game Feed	5	1	17	15	1	20	31	1	9

Figure 1.7: AFMA feed sales per province – 1 April 2022 to March 2024 (%)

Source: AFMA STATS – Only AFMA members

Table 1.3: National animal feed production during 2023/24 (Tons)

Feed Type	AFMA – Feeds Plus Derived from Concentrates	**National Feed Production	AFMA Feed as % of National Production
Dairy	987 564	2 579 222	38,29
Beef & Sheep	1 081 969	3 198 775	33,82
Pigs	500 512	1 184 935	42,24
Layers	857 969	1 036 667	82,76
Broilers	3 540 455	3 552 462	99,66
Dogs	1 589	383 863	0,41
Horses	23 505	132 694	17,71
Ostriches	5 997	92 600	6,48
Aquaculture	9 111	9 200	99,03
Other	36 973		
Total	7 045 644	12 170 418	57,89

Source: Dr Erhard Briedenhann – Modelling

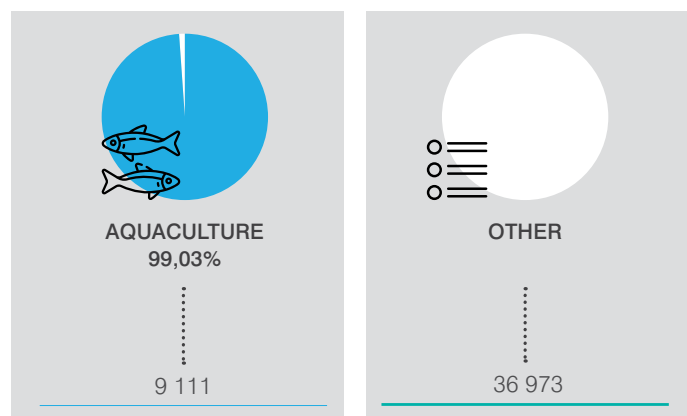
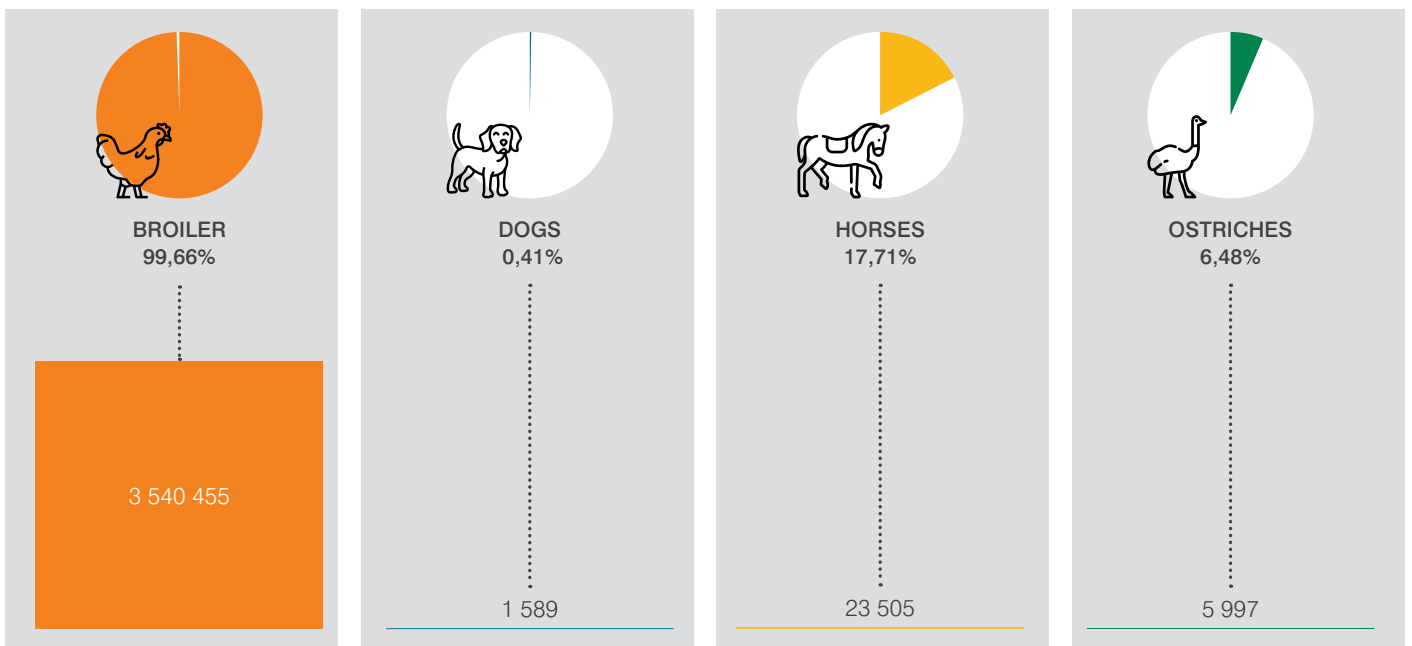
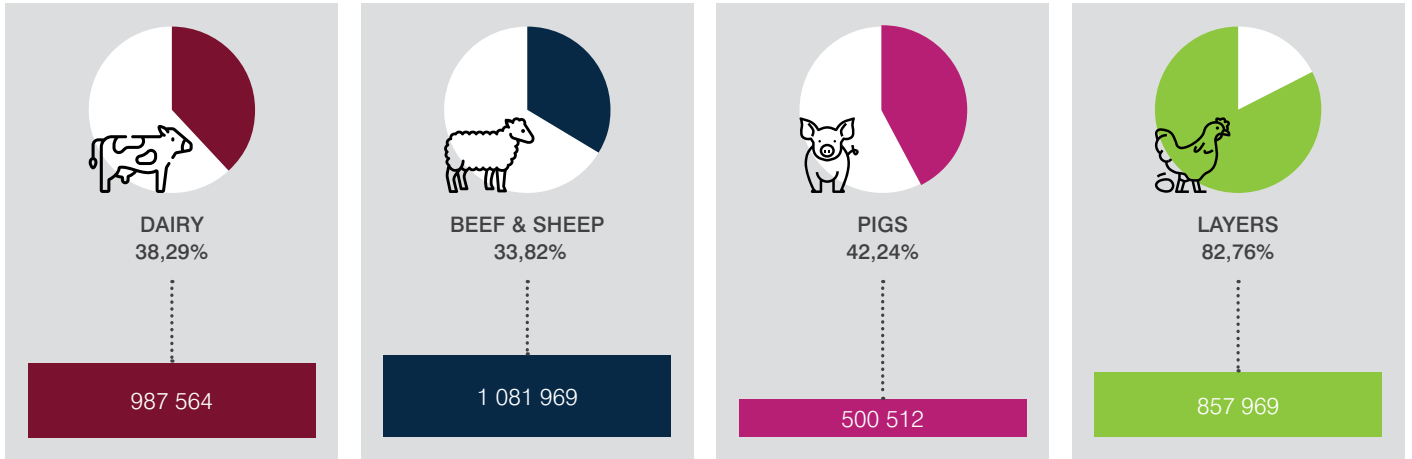


NEXT PAGE

A visual comparison
of AFMA's contribution
towards national
feed production
during 2023/24



AFMA's contribution towards national feed production during 2023/24 (Tons)



4. Trade Committee Matters



< **Chairperson**
Mr Ruan Stander
Meadow Feeds

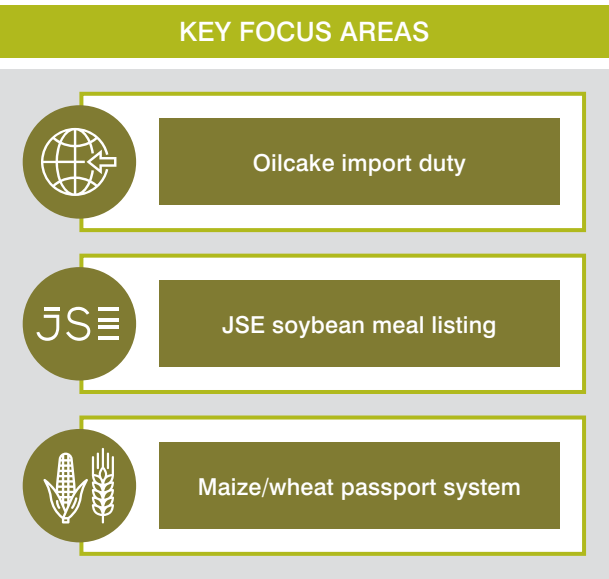


< **Vice-chairperson**
Mr Paul Saunders
Sovereign Foods

4.1 Strategic focus areas

The AFMA Trade Committee identified three (3) key focus areas that are aligned with the overall AFMA strategy and contributes mainly towards the first strategic pillar of providing affordable animal feed to livestock producers.

an independent consultant to assess the maturity of the soybean industry and conduct an economic impact of AFMA’s proposal in support of the application to DTIC and ITAC.



JSE soybean meal listing

The second project objective is to investigate the introduction of soybean meal future trading contracts at JSE. The motive is to provide an alternative and transparent pricing mechanism to enable traders to understand market expectations and pricing trends for soybean meal, and further allow the role players to hedge against price fluctuations. To achieve the objectives, AFMA will provide a support and facilitation role to JSE in engaging with various stakeholders, mainly, the crushers to ensure that consensus is reached on contract specifications, size, and storage commitments to name but a few. To date, various meetings have been held between the JSE and crushers to discuss different components of the soybean meal listing, and the crushers are committing to storage.

Oilcake import duty review

AFMA intends to submit an application to ITAC to reduce the import duty on soybean- and sunflower oilcake to zero percent and embarked on a project to review the import duty structure. AFMA consulted with relevant government departments (DTIC, ITAC, NAMC) and industry stakeholders (Soya Value Chain), including producers (Grain SA), crushers, and end-users (SAPA). The rationale for consultation is to gather insights and gauge industry role players support for AFMA’s proposal to review the oilcake import duty. The consultation was concluded and a final report will be tabled for the Board of Directors’ consideration. Next steps include the appointment of



Grain (maize/wheat) passport system

The third project looks into the implementation of a grain passport system to support consumer confidence in grains that conform to food safety and regulatory requirements and incorporates all links in the value chain from production to storage to processing. AFMA is working closely with the National Chamber of Milling (NCM) as the recognized major customers of the grain value chain and have jointly compiled a standardized form to capture relevant information that will enable processors to manage their raw material risk and give the necessary assurance to their clients the livestock farmers and retailers. Implementation of the grains passport system is an all-or-nothing approach and will require further engagement with storage and mill owners during the next year to ensure success upon implementation.



4.2 Other trade matters

Maize grading regulation



AFMA investigated the impact of the maize grading regulation amendment on the feed industry and submitted comments in collaboration with all maize processors in the grain value chain to DALRRD.

The project was concluded when new maize grading regulation was published in the Government Gazette.

Leaf Services



AFMA will continue monitoring activities in the maize value chain regarding the use of assignees (Leaf Services) to verify the accurate grading of maize according to the Agricultural Products Standards Act.

This is only applicable for feed mills where maize is delivered directly from the producer, since deliveries of maize from a silo will have already undergone inspection at the point of delivery (and transaction) from farmer to storage owner.

Leaf Services has published two (2) government notices inviting stakeholder comments and is currently busy addressing the concerns.

NEW

Copper sulphate



ITAC is investigating a tariff review on copper sulphate import duty to 10% in support of locally produced product.

The feed industry, however, requires a specific quality product for use in animal feed, and will remain reliant on imports for this reason.

ITAC will assess the effect of an increased import duty on the feed industry, and make a recommendation to the Minister.

The project is ongoing between AFMA, ITAC, DTIC and SARS.

NEW

Palm oil & its fractions



ITAC invited AFMA to comment on the application for the creation of a rebate facility on palm oil and its fraction, for use in the manufacture of soaps.

AFMA responded to ITAC and noted that the creation of a rebate facility does not predominantly affect the animal feed industry.

The application was supported based on the reasons by the applicant.

5. Technical Committee Matters



< **Chairperson**
Ms Gay Boomgaard
Meadow Feeds



< **Vice-chairperson**
Ms Janke Bestbier
Alltech Biotechnology

5.1 Strategic focus areas

The Technical Committee’s objectives emphasize the second strategic pillar of AFMA by advocating the use of innovative nutritional strategies to produce nutritious animal feed in a responsible and sustainable way.

The following key focus areas and projects were prioritized:

KEY FOCUS AREAS

Nutrient Guideline Revision Project (NGRP)

Antimicrobial Resistance Advocacy

Nutrient Guideline Revision Project (NGRP)

Animal feed nutrition experts from across the country worked together for a number of years to review all animal feed specifications and to update Act 36 nutrient requirements according to the latest international research. Novel categories for game feed was developed, and classes of feed was amended to reflect latest trends and innovation in animal nutrition. A comprehensive guideline was developed for the new farm feed specifications including definitions and references and it was submitted to the Registrar for Incorporation by Reference into the amended Act 36 farm feed regulations in the coming year.



Antimicrobial Resistance Advocacy

Antimicrobial resistance (AMR) has emerged as a critical global issue and AFMA prioritized AMR advocacy in support of the South African One Health strategy. The focus is on responsible antimicrobial use to protect both animal and public health, and ensuring the long-term sustainability of the animal feed industry. AFMA collaborated with the SA Association for Animal health (SAAHA) to initiate a workshop and open dialogue between suppliers, producer groups, veterinarians, nutritionists, regulators and policy-makers regarding antimicrobial control and surveillance across various sectors. A very successful workshop was held in April 2024 in Pretoria, and participants underscored the need for ongoing dialogue and a follow-up workshop in 2025.



5.2 Monitoring of undesirable substances

AFMA regularly investigates trends and analysis results on the contamination of raw materials, the feed mill environment, and finished feeds to show due diligence in feed safety systems and a strict adherence to quality standards of Good Manufacturing Practises. Monitoring is conducted for salmonella, mycotoxin and dioxin/PCB contaminants of raw materials, the mill system (environment), and finished feeds delivered to the client as a risk mitigation method.

Salmonella

Mycotoxins

Dioxins / PCBs

A total of approximately 150 000 samples were analysed by members for Salmonella since 2005 and provides for a robust platform to measure current success in addressing ad containing the contamination. The latest trends confirmed a higher contamination of incoming raw materials that spills over into the mill environment, but which is successfully treated and contained by feed millers to prevent contamination of finished animal feed.

The South African maize crop quality is surveyed annually by the SAGL at farm level and funded by the Maize Trust. An additional study was approved by the Maize Trust for the 9th consecutive year to also include a study to assess the mycotoxin contamination of maize after storage and at delivery of the maize to feed mills and maize millers across South Africa. 27 Feed mills are participating in the study for yellow maize and regularly submits samples of maize received at the mills for mycotoxin analysis by the reference laboratory in South Africa. Sample collection began in November 2023 and was concluded in July 2024 with the results of the analysis to be discussed in detail at the November Technical Committee meeting.

Polychlorinated biphenyls (PCBs) and dioxins are hazardous environmental pollutants that can accumulate in the feed and food chain, posing significant risks to animal health and human health. PCBs and dioxins are industrial chemicals that, despite being banned in many countries, persist in the environment due to their stability and fat solubility and can accumulate in animal tissues, leading to potential health risks for humans through the consumption of contaminated animal products.

These contaminants are regulated by Act 36 of 1947 and feed millers must verify compliance with the feed safety requirements. AFMA initiated a monitoring system in 2011 to assess the level of compliance of feed ingredients used in animal feed and compile an annual report on its findings. Thus far, 2,259 samples have been analysed with 66% undergoing qualitative analysis via PCB screening, and 44% analysed quantitatively. Currently, no risks have been identified. Due to the analysis not being available in South Africa, the cost of analysis is high, and the frequency of testing can be linked to the observed risk as identified through the AFMA national database.



6. Regulatory Committee Matters



< **Chairperson**
Ms Hanaa Soloman
Allied Nutrition



< **Vice-chairperson**
Ms Liza Burger
Epol

6.1 Strategic focus areas

The AFMA Regulatory Committee is dedicated to shaping an enabling feed regulatory framework in South Africa, and promoting industry self-regulation mechanisms and global trade harmonization. These strategic objectives are in support of AFMA's second and third Strategic Pillars that aim to enable innovative animal nutrition and a modernized regulatory framework for sustainable animal production, and to promote safe feed for safe food.

For 2023/24, the committee identified the following key focus areas:

KEY FOCUS AREAS



Act 36 Farm feed regulation amendments



Feeds and Pet Food Bill



CMR Substance Prohibition

These key focus areas are crucial for AFMA members, as they directly impact regulatory compliance, market access, and competitiveness of the industry. By advancing regulatory transparency and communication with policymakers, AFMA ensures that members are well-prepared to navigate these changes effectively and timeously.

6.1.1 Act 36 Farm feed regulation amendments



The Registrar intends to amend the farm feed regulations, initially published for public comment in 2018. The updated regulations will cover tolerance levels for undesirable substances, veterinary medicine carry-over, allowable claims for pet food, advertising requirements, minor administrative changes, and revised nutrient guidelines based on the latest research. Over the past few years, AFMA and PFI have worked closely with DALRRD, providing feedback and technical input to ensure the regulations are robust and reduce regulatory burdens. The amended draft is expected later this year and may be republished for public comment due to significant changes. AFMA and PFI are dedicated to ensuring the timely adoption of these amendments and will maintain ongoing collaboration with AIC until they are published.





The Feeds and Pet Food Bill represents a significant advancement in modernizing South Africa's animal feed regulatory framework, encompassing both domestic production and imports/exports.

6.1.2 Feeds and Pet Food Bill



The Feeds and Pet Food Bill represents a significant advancement in modernizing South Africa's animal feed regulatory framework, encompassing both domestic production and imports/exports. The bill aims to ensure food and human health safety, reduce unnecessary regulatory burden, incorporate scientific and technological advancements, align with government priorities on food security and economic growth, and enhance industry competitiveness.

The Registrar introduced the new legislative framework to the public during a round of national consultations in 2019 and intends to finalize the bill in 2024 and introduce it to parliament early 2025. AFMA and PFI have regularly consulted with the Registrar during the year and provided inputs to the Department of Agriculture, Land Reform, and Rural Development (DALRRD) on unresolved matters that were identified during the public consultations. AFMA appointed an expert consultant to drive the strategic action on the Feeds and pet food bill and tasked an advisory Committee on Feed Regulation to address outstanding matters and make recommendations. Various workshops were held during the year and a final response on behalf of the feed industry was submitted to the Registrar in August 2024. Going forward, AFMA intends to continue consultation with various affected stakeholders and lobby parliament on the newly proposed feeds regulatory framework.

6.1.3 CMR substance prohibition



Early last year AFMA was informed of a letter circulated by the Registrar's office dated 14 April 2022, informing the industry that CMR (carcinogenic, mutagenic, and reproductive toxic) substances under categories 1A and 1B of the GHS would be phased out by 1 June 2024 to safeguard human health and the environment. While AFMA fully supports worker health and safety, it emphasized the need for a fair and transparent process to legally prohibit the use of a substance in farm feed and to ensure that all registration holders are informed equally. The Registrar introduced a derogation process, but have not yet received an application. AFMA noted that enforcement of a prohibition through non-binding guidelines and selective communication may result in trade issues within the animal feed and pet food industry. Ongoing issues with DALRRD's website further hinders communication with all stakeholders, and reinforcing AFMA's concerns. AIC was requested to provide further guidance on the phase-out. AFMA remains committed to maintain collaboration with AIC, PFI and stakeholders, ensuring clear communication, and addressing regulatory gaps. Additional workshops are planned to ensure industry-wide awareness and compliance.

Early last year AFMA was informed of a letter circulated by the Registrar's office dated 14 April 2022, informing the industry that CMR substances under categories 1A and 1B of the GHS would be phased out by 1 June 2024 to safeguard human health and the environment.



6.2 Industry self-regulation

AFMA is committed to maintaining high industry standards through effective self-regulation mechanisms. These efforts are centered around three key initiatives:

- 1 The AFMA Code of Conduct
- 2 The AFMA Transport Protocol
- 3 The Early Warning System (EWS)

These mechanisms are all designed to ensure the safety, quality, and integrity of animal feed in South Africa, fostering trust, accountability and excellence within the sector. AFMA also collaborates with the Agricultural Inputs Control (AIC) division on compliance issues related to the animal feed sector. However, recent lapses have underscored the importance of self-regulation, ensuring the industry remains a leader in feed safety and quality, complementing government oversight and securing a reliable, compliant feed supply.

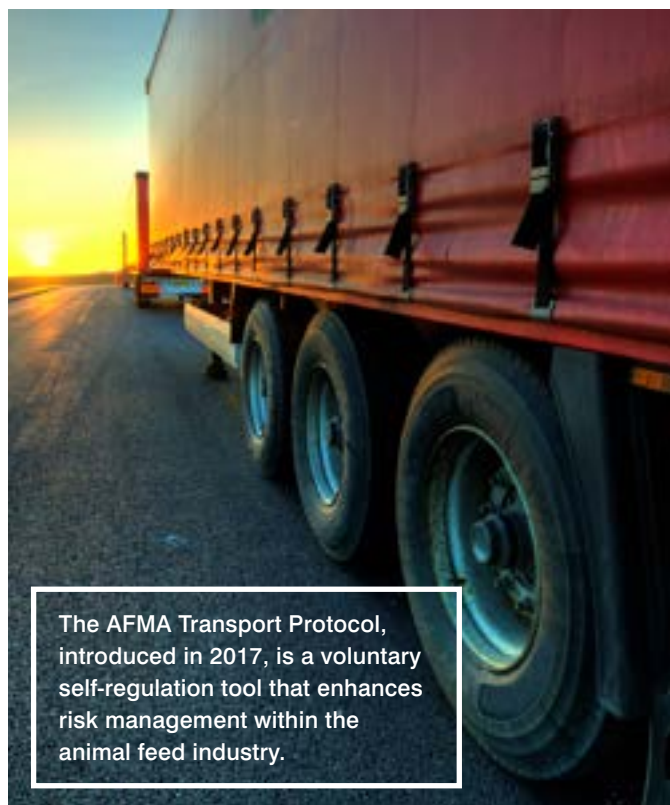
6.2.1 AFMA Code of Conduct

The AFMA Code of Conduct, established by the Board of Directors in 2007 and fully adopted by all members by 2010, is a cornerstone of self-regulation in South Africa's feed industry. It outlines twelve essential conformance standards, emphasizing the industry's commitment to sustainability, responsibility, and ensuring that safe feed leads to safe food. Compliance with the Code is mandatory for all Full and Associate AFMA members, with independent audits conducted every two years to ensure adherence. Adhering to the AFMA Code of Conduct offers numerous benefits, including enhanced industry reputation, and access to updated compliance information. It also recognizes third-party storage compliance and helps improve facility conditions. Members can display the AFMA logo, further boosting client confidence.

Earlier this year, a member survey was conducted to help lay the groundwork for modernizing the Code of Conduct to better align with current industry needs and anticipated legislative changes. Importantly, the modernization is aligned with the Feeds and pet food Bill in terms of facility requirements and AFMA will continue to promote its acknowledgement as an effective self-regulation mechanism.

6.2.2 AFMA Transport Protocol

The AFMA Transport Protocol, introduced in 2017, is a voluntary self-regulation tool that enhances risk management within the animal feed industry. It ensures that transporters adhere to high standards of safety and hygiene, following guidelines adapted from GMP standards. The protocol covers road transporters handling raw materials and feed ingredients, whether in interim storage or direct delivery to manufacturing plants.



By adopting this protocol, transporters demonstrate a strong commitment to safe, responsible transportation, earning the right to display the AFMA logo on their trucks, which boosts their reputation and credibility. Currently, nine transport providers are validated and listed on the AFMA website, underscoring its growing influence within the industry.



<https://www.afma.co.za/afma-transport-protocol>

6.2.3 AFMA Early Warning System (EWS)

The AFMA Early Warning System (EWS), introduced in 2009, is a proactive tool to mitigate risks in the animal feed industry. Its primary purpose is to safeguard the safety, quality, and integrity of animal feed by identifying and mitigating risks posed by hazardous substances like melamine and heavy metals, which can infiltrate both international and South African markets. The EWS is designed to protect the entire industry and the broader food supply chain from such threats. The EWS enables early detection and rapid response to potential risks in raw materials and feed products, reducing the likelihood of recalls and ensuring regulatory compliance. By providing real-time alerts on potential threats, the system enhances supply chain integrity, supports better decision-making, and builds consumer confidence. Although not recently activated, AFMA continues to emphasize the importance of vigilance, particularly considering recent concerns over product adulteration, underscoring the EWS's role in maintaining feed safety.

7. Training and Skills Development Committee Matters



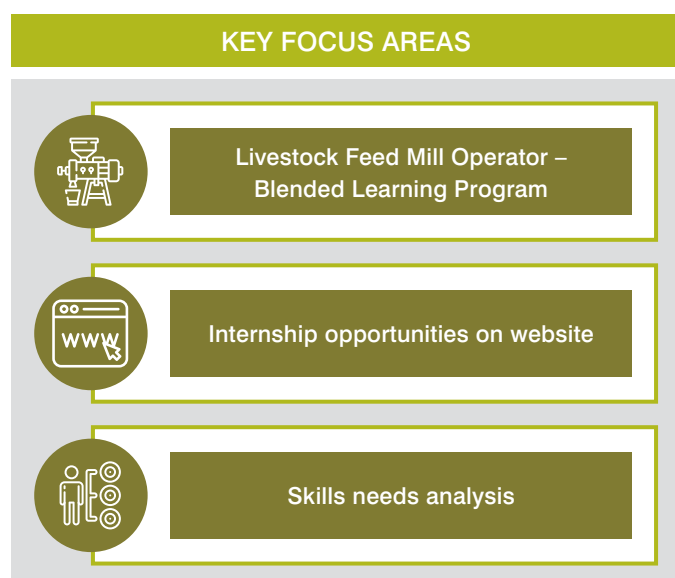
< **Chairperson**
Ms Liesl Breytenbach
AFMA



< **Secretary**
Ms Wimpie Groenewald
AFMA

The Training & skills development committee identified three (3) key focus areas that are in support of the overall AFMA strategy regarding job creation, training opportunities and skills development within the animal feed industry.

The following key focus areas and projects were prioritized:



7.1 Strategic focus areas

Livestock Feed Mill Operator – Blended Learning Program

AFMA developed a blended learning program for livestock feed mill operators in collaboration with Learning Pathways and a Community of Expert Practitioners amongst its members. The training opportunity was launched in 2020 and since then 50 learners received certificates for completion of the course, recognizing

them as Feed mill Operators in the industry. A marketing campaign was initiated this year to increase awareness of the learning program and to boost participation. As part of a new service level agreement with the training provider, companies can now register new learners online and engage with AFMA directly regarding the training opportunity.



<https://www.afma.co.za/livestock-feed-milling-operator-e-learning-program>

Internship opportunities on website

During AFMA's regular engagements with university students it became apparent that job opportunities and practical experience in the industry rate amongst the top needs. AFMA subsequently made an agreement with AgriJob to expand the current benefit for AFMA members to not only include a free advertisement for a job opportunity on the website, but also to offer a collection of holiday work and internships available in the feed industry. Members were very eager to participate during the gathering of information regarding existing internships and it is expected that these opportunities will be launched on the new AgriJob platform before the end of 2024.



<https://www.agrijob.co.za/jobs>

Skills Need Analysis

The Committee identified the need to gather comprehensive data on potential skills needs within the industry and to propose new training initiatives to address the gaps. A comprehensive skills need analysis is planned for this year and a working group has been established to support strategic action.

7.2 Other training & skills development matters



Occupational Qualifications

Two Occupational Qualifications have been successfully registered by SAQA this year, namely a Feed Miller qualification (NQF level 05) and a Feed Mill Operator qualification (NQF level 04) and AFMA intends to partner with an accredited training provider to offer these qualifications in the next year.



CPD Credits for Training Courses

AFMA is registered at SACNASP as a training provider and is committed to support its registered professional animal scientist members by providing CPD credits for all its workshops and training courses. Additional accredited self-study options will be added in the new year to ensure a continuous professional development opportunity for animal scientists.



Alignment between Academia and Industry

During the next year, AFMA intends to further bridge the gap between academia and industry and to align focus areas by facilitating a platform for dialogue and strategy between the Heads of Animal Science Departments at all Tertiary institutions and the feed industry. This platform will support future efforts to address research needs and skills gaps of graduates in animal science. A pilot project was launched this year to invite all universities to submit their top research posters in animal science to be displayed at the upcoming AFMA Symposium in October 2024.

7.3 AFMA Awards

AFMA wishes to congratulate the following winners of prestigious awards during the last year:

AFMA Person of the Year Award 2022/23



AFMA PERSON OF THE YEAR AWARD 2022/23

Wouter de Wet
Rainbow Chicken Foods (Pty) Ltd

for his outstanding and noteworthy contributions to the animal feed industry.



Barney van Niekerk / AFMA Technical Person of the Year Award 2023



BARNEY VAN NIEKERK / AFMA TECHNICAL PERSON OF THE YEAR AWARD 2023

Brett Roosendaal
EPOL (Pty) Ltd

for his exceptional dedication and significant contributions to the animal nutrition industry.



Koos van der Merwe / AFMA Student of the Year Award 2023



KOOS VAN DER MERWE / AFMA STUDENT OF THE YEAR AWARD 2023

Hendrik Human

of the University of the Free State for being the best final year graduate student in Animal Nutrition.



AFMA Student Nutrition Poster Award 2024

- ➔ **Winner:** Makiwa Simeon Mthana from the University of North-West.
- ➔ **First Runner-Up:** Tony Ferreira from the University of Pretoria.
- ➔ **Second Runner-Up:** Ramokone Millicent Mokonyama from the University of North-West.



From the left: Mr Trevor Dugmore (SASAS Chairman), Ramokone Millicent Mokonyama (University of North-West), Tony Ferreira (University of Pretoria), Makiwa Simeon Mthana (University of North West) and Ms Bonita Cilliers (AFMA).



Overall winners of the AFMA 2023 Intervarsity Writer's Cup

- ➔ **Student** – Michelle Gouws; & **Promoter** – Dr Lobke Steyn from the University of Stellenbosch



From left to right: Anina Hunter (Epol; AFMA Chairperson); Michelle Gouws (IWC overall winner – Own research category, Stellenbosch University) and Dr Lobke Steyn (Student Promotor & 2023 IWC Champion, Stellenbosch University).

AFMA INTERVARSITY WRITER'S CUP COMPETITION

The AFMA Intervarsity Writer's Cup competition enables students to share their research and knowledge with the readers of the **AFMA Matrix** magazine.

WHO MAY ENTER?

Final year Animal Science students or Postgraduate Nutrition Science students, studying at a South African university.

ARTICLE THEMES

Feed industry: Legislative environment; Trade environment (economy/pricing/trade) • Feed science: Additives • Nutritional science: All species • Feed processing: Milling/mixing/formulation/packaging

COMPETITION CATEGORIES

- Own research
- Literature review

PRIZES

- Cash prizes for published articles.
- University of the overall winner gets bragging rights for one year as the AFMA Intervarsity Writer's Cup Champion.



Visit www.afma.co.za for more information

8. Marketing & Promotion Matters

8.1 Events

EVENTS

	EVENT	VENUE	ATTENDING
5-7 September 2023	2023 Forum	Sun City Resort, Rustenburg	772 Delegates
16 April 2024	Student Outreach	De Heus, Umlaas Road, KZN	45 Students
23-24 April 2024	AMR Workshop	Willows Boutique Hotel, Pretoria	120 Delegates
6-16 May 2024	Feed Miller Short Course	The Conclave Country Lodge, Pretoria	51 Delegates
12 June 2024	Technical Writing Skills Workshop	The Centurion Country Club, Pretoria	41 Delegates
7 August 2024	Golf Day	The Centurion Country Club, Pretoria	136 Players



AFMA
Animal Feed Manufacturers Association

AFMA-SAAHA ANTIMICROBIAL RESISTANCE WORKSHOP

23 & 24 April 2024
Willows Boutique Hotel and Conference Venue
The Willows, Pretoria

Draft programme available!
Only 3 days left to register!
Workshop won't be repeated in 2024.

REGISTER BY 18 APRIL 2024



AFMA
Animal Feed Manufacturers Association

REGISTER NOW

AFMA Technical Writing Skills Workshop

Wednesday, 12 June 2024
Centurion Country Club

www.afmatechnicalwritingskillsworkshop.co.za



Sponsorship bookings open
Thursday, 23 May 2024 at 9am

AFMA GOLF DAY

FIRST-COME, FIRST-SERVED

7 August 2024
Centurion Country Club

AFMA
Animal Feed Manufacturers Association

AFMA Forum 2023



The Sun City Convention Centre offered an all-encompassing experience, seamlessly integrating conference facilities, accommodation, and entertainment for the 772 delegates who attended. The King's Ballroom stood out for its spacious design, while the Super Bowl provided ample space for exhibits and easy access to amenities. The AFMA Forum featured 29 speakers, selected from 62 submissions, and was well-supported with 25 package sponsors, 14 item sponsors, 24 speaker sponsors, and 5 student sponsors, totaling 42 exhibitors. The event balanced industry insights with lively social activities, highlighted by energetic performances from The Muses, a Marimba Band, and Dr Victor and the Rasta Rebels, making the closing beach party a memorable finale



UKZN Animal Science students visit the De Heus Feedmill



On 16 April 2024, a group of Animal Science students from the University of KwaZulu-Natal visited the De Heus Feedmill at Umlaas Road. This visit provided the students with an exclusive tour through the feed mill and an invaluable opportunity to engage with dedicated De Heus employees, many of whom have advanced within the company, offering the students real-world insights into career development in the feed industry.

During the visit, the students also received valuable information from Agrijob and the South African Council for Natural Scientific Professions (SACNASP), which further enriched their understanding of the career paths available in this sector. The interaction and knowledge shared during this visit underscored the importance of connecting academia with industry, and fostering future talent for the feed industry.



AFMA-SAAHA Antimicrobial Resistance Workshop



Feed Miller Short Course

AFMA 2024 Technical Writing Skills Workshop



The AFMA 2024 Technical Writing Skills Workshop, held as a one-day CPD registered event, was highly successful. The workshop featured Dr. Pieter Henning and the Plaas Media Social Media Team, who offered expert guidance on writing technical articles for magazines and mastering content for social media and online platforms. Attendees gained valuable insights and practical skills to enhance their communication strategies.

The workshop was well-attended by industry professionals from various sectors, focusing on improving clarity, precision, and effectiveness in technical writing. It covered essential topics like structuring reports, tailoring content, and avoiding common pitfalls. Positive feedback highlighted the interactive format and the facilitators' expertise, underscoring the workshop's impact on raising standards in technical communication within the feed industry.



AFMA 2024 Golf Day



8.1.1 AFMA Annual and General Meetings

AFMA successfully hosted its General Meeting and Annual General Meeting during this year and thank all members for their support and participation.



5 September 2023
Annual General Meeting
Sun City Resort,
Rustenburg
83 Members

4 April 2024
General Meeting
Grain SA Auditorium,
Pretoria
74 Members

8.2 Digital communication channels

The AFMA Board is committed to continuously enhancing the Association’s image and brand by exploring new technologies and improvements. AFMA upholds a high standard of professionalism and corporate integrity across all its activities, reflecting its commitment to maintaining a distinguished presence in every aspect of its operations.

8.2.1 AFMA website and microsites

The AFMA website is the central hub for the Association, providing up-to-date information and features relevant to the animal feed industry. It boasts a modern design and is regularly refreshed with the latest updates. You can visit the main site at www.afma.co.za.

Additionally, AFMA operates four dedicated microsites for specific events:

- ➔ AFMA Symposium: www.afmasymposium.co.za
- ➔ AFMA Forum: www.afmaforum.co.za
- ➔ AFMA Technical Writing Skills Workshop: www.technicalwritingskills.co.za
- ➔ AFMA Golf Day: www.afmagolfday.co.za

8.2.2 Member Update

The AFMA Member Update is a quarterly newsletter that offers a comprehensive overview of AFMA’s activities, initiatives, and committee discussions. It is designed to keep members informed about key developments and decisions within the Association.



8.2.3 Social media

AFMA’s social media presence continues to expand, with increasing followers and engagement on Facebook, X (previously, Twitter), and LinkedIn. These platforms allow AFMA to provide real-time updates on events and share important information as it becomes available.



*Followers as on 3 September 2024

8.3 Print media

8.3.1 AFMA Matrix

The AFMA Matrix, the Association’s quarterly industry magazine, first debuted in March 1992. Since 2012, AFMA has had a co-publishing agreement with Plaas Media. The magazine’s editorial committee meets quarterly to ensure that the content remains relevant and addresses the evolving needs of AFMA members and other stakeholders.



9. AFMA Membership

TOTAL AFMA MEMBERSHIP



63 Full members



75 Associate members



19 Affiliate members

ASSOCIATE MEMBERSHIP CATEGORIES



32 Manufacturer/Supplier of Raw Materials



37 Manufacturer/Supplier of Premixes/Feed Additives



6 Manufacturer/Supplier of Stock Remedies/Veterinary Medicines

AFFILIATE MEMBERSHIP CATEGORIES



6

Laboratory Services



9

Equipment Suppliers



3

Consultant Services



1

NGOs

AFMA remains an active and relevant industry association as illustrated by regular membership requests being received. During this year a total of 27 applications for AFMA membership were received for full membership (8), associate membership (12), and affiliate membership (7).

One (1) full member and three (3) Associate members resigned their AFMA Membership.

9.1 New members

AFMA welcomes the following companies that have successfully verified their compliance to the AFMA Code of Conduct (a mandatory requirement for Full and Associate membership) and have been awarded an AFMA Membership Certificate:

Full Members

- ➔ Daybreak Foods

Associate Members

- ➔ Terradam (Pty) Ltd
- ➔ AJ Oils (Pty) Ltd
- ➔ Norkem Chemicals SA (Pty) Ltd

Affiliate Members

- ➔ R-Biopharm (Pty) Ltd
- ➔ WAM South Africa Bulk Handling (Pty) Ltd
- ➔ Agrispace (Pty) Ltd
- ➔ Analytical & Diagnostic Products CC
- ➔ Aspirata ta Assure Cloud

9.2 Renewal of AFMA membership

Membership is renewed bi-annually for Full and Associate members with the verification of compliance to the AFMA Code of Conduct and can be done online at <https://www.afma.co.za/membership-renewal-application>

AFMA membership lists can be viewed at <https://www.afma.co.za/membership-list> and includes an updated status on the COC compliance of member companies.

During the review period, a total of nine (9) transport companies participated in the AFMA Transport Protocol Audit process. The list of approved transporters can be viewed at <https://www.afma.co.za/afma-transport-protocol>

AFMA would like to thank our members for their commitment and valuable contributions towards producing safe feed for safe food.

10. Staff Matters



Front, left to right: Mrs Mandy Joubert, Mrs Liesl Breytenbach and Mrs Wimpie Groenewald.
Back, left to right: Mrs Bonita Cilliers, Ms Bee Oelofsen, Mrs Olivia Botha and Mr Lucius Phaleng.

The staff within the AFMA office in Pretoria remained stable throughout the year with Liesl Breytenbach leading the team since August 2023 as the new Executive Director.

The staff includes:

- Benita Oelofsen – Marketing & Events Coordinator
- Bonita Cilliers – Technical & Regulatory Advisor
- Lucius Phaleng – Trade Advisor
- Mandy Joubert – Financial Accountant
- Olivia Botha – Administrative officer
- Wimpie Groenewald – Membership Liaison Officer

AFMA appointed a technical intern, Elri du Toit, in June 2024 to assist Bonita within the Technical and regulatory division on a part-time basis. Elri has settled into the position quickly and adapted to working-life with ease. She will gain tremendous experience at AFMA and be exposed to all aspects of the feed industry.

The manager vacancy resulting from Liesl Breytenbach's promotion last year was filled towards the end of the period with the appointment of an Operations Manager in September 2024.

11. Acknowledgements



Back, left to right: Dr Josef Van Wyngaard (Voermol), Dr Franscois Crots (Country Bird Holdings), Mr Paul Saunders (Sovereign Foods), Mrs Sharlene Moodley (De Heus Animal Feeds), Mr Thinus Van Lill (Quantum Foods), Mr David Nel (Quantum Foods) and Mr Dieter Fleischmann (AFGRI Animal Feeds).

Front, left to right: Mr Brett Roosendaal (Epol), Mrs Liesl Breytenbach (Executive Director, AFMA), Mrs Anina Hunter (Epol), Mr Michael Schmitz (Meadow Feeds) and Dr Neil Dominy (Astral Foods).

The success of AFMA can be attributed to a dedicated Board of Directors that supported me during my term as Chairperson and I want to thank them for their time and commitment to serving the industry.

The AFMA Committees contributed significantly towards the success of AFMA and have tirelessly worked towards achieving their respective strategic goals. Without the guidance of the Chairpersons and Vice-chairpersons, and input and contributions of the committee members this would not have been possible. A heartfelt appreciation to each of the AFMA Committees and to member companies for their support in encouraging their employees to participate on industry matters:

Technical Committee: Gay Boomgaard (Meadow) and Janke Bestbier (Alltech)

Regulatory Committee: Hanaa Solomon (Allied Nutrition) and Liza Burger (Epol)

Trade Committee: Ruan Stander (Meadow) and Paul Saunders (Sovereign Foods)

Also making an important contribution to the work of AFMA is the panel of expert judges that are tasked to evaluate the technical articles submitted for the Intervarsity Writer's Cup and the student posters submitted for the Nutrition poster award. Your service to the industry is sincerely appreciated and your mentorship and guidance in shaping animal nutrition research in South Africa is highly valued.

I also want to thank the AFMA staff for their commitment, dedication and great spirit within which they perform their work and carry out the success of AFMA. In support of the office, a number of trusted service providers are used to compliment AFMA's service delivery to members and a sincere appreciation for their professional service.

Lastly, but not the least, my thanks go out to all Full members, Associate members and Affiliate members for their selfless contributions, participation and support for AFMA throughout the year.

Animal Feed Manufacturers Association (AFMA)

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