

AFMA MEMBER UPDATE

For additional information regarding the projects and actions mentioned in the AFMA Member Update, please reach out to the AFMA office at +27 (0)12 663 9097 or email admin@afma.co.za.

2024 in review

Dear AFMA Members

2024 brought a mix of opportunities and challenges for the agricultural sector, emphasising the importance of resilience, adaptability, and collaboration. The resilience and determination of our industry were tested, particularly as we faced the impacts of El Niño, which significantly affected summer crop yields and consequently filtered through to animal feed prices.

Soybean production in the 2023/24 season experienced a significant decline, dropping from a record 2,77 million tons to 1,84 million tons due to the impact of drought conditions. This decrease, supported SAFEX prices from trading at export parity levels in January 2024 to import parity levels by November 2024. Similarly, yellow maize, crucial for animal feed, prices increased from ≈R3,650 per ton in January 2024 to ≈R4,800 amid the tight supply and demand situation. Meanwhile, white maize prices surged to record highs, widening the gap with yellow maize, resulting in record yellow maize consumption levels in October 2024 in animal feed.

With the new planting season underway, the improved rainfall outlook has sparked optimism across the sector. Despite still delays in rainfall in some areas, there is optimism and expectations of better yields. A good crop will be crucial for 2025 in alleviating the pressure of high input costs, particularly for animal feed production, and ensuring sufficient local supply to meet demand.

In addition to the challenges outlined above, AFMA has been highly active the past quarter in advancing key initiatives for our members. This newsletter will feature updates on AFMA's application to ITAC for a rebate on copper sulphate following the 10% customs duty increase announced in September 2024. Progress of the Feeds and Pet Food Bill will be given while also reviewing the recent Symposium, where awards were presented to outstanding students.

In terms of policy, the South African Poultry Association (SAPA) applied for a zero-rating of VAT on certain poultry products, including offal and frozen bone-in chicken, to make essential items more affordable for low-income households. The President has also shown his support for expanding the list of VAT zero-rated food items, aligning with SAPA's initiative, to help mitigate economic difficulties in South Africa. AFMA supports this effort but has raised some areas of concern and that the zero-rating should not be limited to only frozen poultry but should include both frozen and fresh products.

Logistical challenges, particularly at the harbours, continue to hinder the competitiveness of the sector. However, positive progress is being made through initiatives like the Grain Value Chain Round Table, which fosters collaboration between government and industry stakeholders. Recent discussions and initiatives have focused on improving infrastructure and fostering partnerships to enhance competitiveness in the grain sector.

As we are in the last month of 2024, we extend our appreciation to each member for their support throughout this uncertain year. As the holiday approaches, we wish everyone a relaxing and well-deserved break, filled with quality time with loved ones and moments of rest.

Come back recharged and ready to face the opportunities of 2025 with renewed energy. Thank you for your continued commitment and let us look forward to another productive and prosperous year ahead!

Liesl

Liesl Breytenbach
Executive Director: AFMA

NEWS INSIDE

■ 2024 in review.....	1
■ AFMA Membership and Code of Conduct matters.....	2
■ AFMA Trade Committee Matters.....	2
• ITAC investigation: Full-duty rebate for copper sulphate used in animal feed	2
■ AFMA Technical & Regulatory Committee Matters	2
• 2024 in Review: Achievements of the Technical and Regulatory Committee.....	2
• Nutrient Guideline Revision Project (NGRP)	2
• Antimicrobial resistance advocacy.....	3
• Act 36 farm feed regulation amendments	3
• Feeds and Pet Food Bill	3
• CMR substance prohibition.....	3
• Farm Feed Division Update.....	3
• AFMA Code of Conduct Member Survey.....	4
• Remote Audits proposed for the AFMA Code of Conduct	4
■ AFMA Training and Skills Development Committee Matters	5
• Feed Mill Operator E-learning Program: Empowering the Feed Milling Industry	5
• Act 36/1947 Training for the Feed Industry	5
■ AFMA Events	5
• The AFMA Symposium 2024	5
■ AFMA Student Awards 2024	7
• AFMA Student of the Year Award (Koos van der Merwe Award)	7
• AFMA Student Research Expo	7
• Intervarsity Writers Cup (IWC).....	7
■ The AFMA Matrix	8
■ About AFMA.....	8
■ Season's Greetings	8
■ Contributors to the AFMA Member Update	9
■ Stay informed	9
■ Contact AFMA.....	9



AFMA Membership and Code of Conduct matters

Currently, AFMA has 156 members, comprising 63 Full members; 75 Associate members; and 18 Affiliate members.

AFMA continues to receive regular requests for membership via its [online application process](#), illustrating its relevance and importance as a representative body within the agricultural sector and a spokesperson for the animal feed industry.

Commitment to the AFMA Code of Conduct is mandatory for full and associate membership and compliance is verified biennially through an independent auditor appointed by AFMA.

Since June 2023, the following membership activities have been noted:

- ▶ 107 facility audits conducted.

- ▶ 90 CoC certificates issued.
- ▶ 42 new membership applications received.
- ▶ 94 renewal applications received.

Non-compliance issues:

During this period non-compliances were recorded at 8.8% of audited facilities. The main issues were related to labelling, health & safety, and legal entity risks. An updated membership list is available on the website and includes a status of compliance for each facility.

AFMA TRADE COMMITTEE MATTERS

ITAC investigation: Full-duty rebate for copper sulphate used in animal feed

The ITAC Report Number 675 has brought to attention a significant increase in the customs duty rate on sulphates, specifically alums, peroxosulphates (persulphates), as well as copper sulphate, which is classified under tariff subheading 2833.25. This change, which raises the duty from a zero rate to 10% ad valorem, was implemented by SARS on 20 September 2024.

In recognition of the unintentional consequences this increase may have on the animal feed manufacturing sector—particularly regarding the use of copper sulphate in production processes—the Minister of Trade, Industry, and Competition (ITAC) has acknowledged the potential impact.

Consequently, ITAC has initiated an investigation into the feasibility of establishing a rebate facility for copper sulphate utilised in the manufacture of animal feed. AFMA members, comprising feed manufacturers, premix producers, and raw material suppliers, have contributed valuable insights by completing questionnaires designed by ITAC. These responses aim to clarify the anticipated effects of the increased import duty on their operations.

At this time, we await the conclusion of ITAC's investigation and the subsequent findings, which will determine whether a full-duty rebate facility is warranted.

AFMA TECHNICAL & REGULATORY COMMITTEE MATTERS

2024 in Review: Achievements of the Technical and Regulatory Committee

Focused on AFMA's strategic pillars, the Technical Committee advanced innovative, sustainable animal feed strategies, while the Regulatory Committee worked to modernise the feed regulatory framework and promote self-regulation. Below, and on the next page, is a summary of progress in each focus area.

Nutrient Guideline Revision Project (NGRP)

AFMA, in collaboration with nutrition experts, updated farm feed nutrient tables to align with international standards and Act 36 requirements. Key achievements include reviewing all feed specifications, introducing game as a new feed category, and updating feed classifications to reflect modern trends in animal nutrition.

A comprehensive guideline was submitted to the Registrar in early 2023 for incorporation into revised regulations. In August 2024,

the Agricultural Input Control (AIC) sought clarification on product categories and additional specifications for certain species.

Some key next steps include finalising the mineral values and aligning MTLs with undesirable substance limits via nutrient guideline subcommittees, to address critical updates such as CMR substance management and proceed with a phased regulatory publication approach.

Achievements of the Technical and Regulatory Committee (continued)

Antimicrobial resistance advocacy

Antimicrobial resistance (AMR) is a global concern impacting both animal and public health. Aligning with the South African One Health strategy, AFMA has taken proactive measures to address AMR, focusing on sustainable and responsible antimicrobial use in animal production.

AFMA will continue to raise awareness, support research initiatives, and engage stakeholders in AMR management. A follow-up workshop is planned for 2025 to continue fostering dialogue and refine strategies. Members are encouraged to participate in these initiatives, contributing to safeguarding animal health and public safety.

Act 36 farm feed regulation amendments

Efforts to amend farm feed regulations focused on reducing the regulatory burden while aligning with industry best practices and global standards. Since 2018, submissions have included inputs on undesirable substance tolerance levels, carry-over levels for veterinary medicines for non-target species feed, livestock and pet food claims, high-moisture hominy chop registration, advertising requirements, minor administrative amendments, and revised nutrient guarantees for specific farm feeds, including a new game feed category, all of which are now in the final stages of internal review.

AIC plans to share a draft of the updated regulations with the liaison working group by year-end. AFMA has requested additional time for a thorough review to ensure accuracy, avoid costly errors, and accommodate limited member availability during the holiday season. The final draft will be open for public comment in early 2025.

Feeds and Pet Food Bill

The Feeds and Pet Food Bill aims to modernise the regulatory framework for the feed and pet food sector, aligning with international standards while supporting local industry growth and adaptability.

In August, the advisory committee submitted detailed feedback to DALRRD, emphasising addressing regulatory details in separate regulations for easier updates. Initial consultations shaped a draft bill reflecting industry needs and ministerial priorities. A draft of the Bill will be shared with the working group early next year, with parliamentary submission targeted for March 2025. Members are encouraged to participate actively in the public commentary phase.

CMR substance prohibition

The phase-out of Carcinogenic, Mutagenic, and Reproductive (CMR) toxic substances in animal feed formulations, initially set for 1 June 2024, aims to enhance public and animal health. Progress by the Department of Agriculture has been slow, with clear direction on the process still pending. Following feedback on the April guideline, AFMA and PFI emphasised the need to integrate CMR substance regulations into the official regulatory framework for legal enforcement and transparency. Going forward, AFMA will coordinate feedback, host information sessions, and guide members on legislative changes as the process unfolds. Members are encouraged to stay informed and provide input.

Farm Feed Division Update

Farm Feed registrations and renewals

Between August and October 2024, the division received 810 applications (207 new registrations and 532 amendments) and completed 604, including 191 new registrations and 413 amendments. The division is currently evaluating new applications and amendments submitted in August 2024.

Renewals have also seen substantial progress. For the 2024/2027 cycle, all applications have been finalised and collected, while early applications for the 2025/2028 cycle resulted in 269 completions, with 611 still in progress. Currently, renewals are being processed within two weeks, reflecting improved efficiency. Currently, renewals are being processed within two weeks, reflecting improved efficiency. With over 5,000 applications anticipated for this renewal cycle, members are encouraged to submit applications early, especially before the holiday season, to ensure smooth and timely processing before the anticipated influx of applications early next year.

Outstanding applications

Outstanding applications have decreased significantly, dropping from 1,459 in January to 1,005 by October. While 483 applications remain on hold due to issues like incomplete submissions and bulk amendments, all applications are being assessed within expected service delivery timeframes. The division continues to refine processes to address on-hold applications and maintain its operational efficiency.

Modernisation efforts: E-submission

The electronic Farm Feed Submission System, set to be the second implemented across all sectors under Act 36, has entered its second phase of development. It aims to introduce digital submission and application tracking. Internal testing is in progress, with stakeholder testing and a pilot phase on the horizon. This system aims to enhance efficiency and transparency in registration processes, highlighting the division's commitment to modernisation.



AFMA Code of Conduct Member Survey

Between February and May 2024, AFMA conducted a comprehensive survey to evaluate the relevance and application of its Code of Conduct, a cornerstone of self-regulation in South Africa's feed industry. With a 59% response rate from 83 members representing 77% of AFMA full member feed production, the survey laid the groundwork for modernizing the Code to align with international standards and industry evolution.

Key Findings

- ✓ **High Familiarity:** 60% of respondents were very familiar with the Code, while 40% somewhat familiar, noting gaps due to personnel changes.
- ✓ **Value Perception:** 89% agreed the Code enhances industry practices, though some called for better communication on its benefits.
- ✓ **Audit Satisfaction:** Respondents praised auditor professionalism but requested clearer feedback and improved alignment with other food safety and risk management standards.

Committee Recommendations

- ✓ **Purpose Awareness:** Enhance understanding of the Code's purpose and value through webinars, practical guides, and information sessions.
- ✓ **Assessment Bodies:** Conduct further research to assess the feasibility of additional assessment bodies, ensuring alignment with industry compliance goals.

AFMA will share the survey feedback with AFRI Compliance to implement short-term enhancements in audit practices. The Code will be finalized to include updated FSSC and food safety standards, along with international best practices. AFMA will also initiate targeted communication and training initiatives to clarify the Code's role and address misconceptions. AFMA will also investigate cost management, refine the audit scope, and assess the feasibility of incorporating additional assessment bodies to enhance compliance and efficiency. The survey serves as a vital step in aligning the Code with international best practices, modern legislative frameworks, and evolving industry needs.

Remote Audits proposed for the AFMA Code of Conduct

A progressive proposal to include remote audits under the AFMA Code of Conduct was discussed by the Advisory Committee and presented at the Regulatory Committee meeting. This initiative is tailored for direct traders and non-exporting SADC manufacturing facilities exempt from South African legislation. It aims to address logistical and cost challenges associated with on-site audits while ensuring compliance with the AFMA Code of Conduct.

Key Elements of the Proposal

1. **Remote Audit Process:** Eligible members will participate in remote audits conducted via platforms such as Zoom or Teams. Pre-audit checklists and required documentation will be provided in advance to streamline the process.
2. **Alternating Audit Method for SADC Members:** Audits for SADC members will alternate between remote and on-site evaluations, ensuring every second audit is conducted in person to maintain integrity and compliance.

3. **Initial On-Site Audit:** For new members, the first audit will always be conducted on-site to establish a thorough understanding of their operations.
4. **Certification Validity:** Certificates will remain valid for two years, with remote audits adhering to the same stringent standards as on-site evaluations.
5. **Local Manufacturers:** A suggestion to extend remote audits to South African manufacturers was not supported due to concerns about compliance with national legislation and maintaining consumer confidence. On-site audits will remain mandatory for these members to uphold rigorous standards.

The Advisory Committee's proposal on the AFMA Code of Conduct received positive feedback from the Regulatory Committee and will proceed to the Board for final approval.



AFMA TRAINING AND SKILLS DEVELOPMENT COMMITTEE MATTERS

Feed Mill Operator E-learning Program: Empowering the Feed Milling Industry

Launched in 2020, AFMA's blended learning program equips feed mill operators with essential skills through a combination of e-learning and hands-on, work-based training. The flexible course balances theoretical concepts with practical, experience-based learning in real feed production environments.

Each participating feed mill acts as a site for learning and evaluation, providing learners with valuable, applied experience. Key modules cover material handling, storage, feed production and processing, quality control, and team leadership.

By integrating theoretical concepts with on-the-job training, the program prepares learners to operate confidently and effectively at an operator level, ensuring long-term benefits for both learners and their companies.

AFMA observed that companies enrolling their feed mill operators are increasingly doing so annually, indicating clear evidence of the program's value and the improvement in workplace performance. AFMA encourages companies to invest in this program to develop skilled operators capable of leading and improving operational efficiency.

For more information or to register, visit the [AFMA website](https://www.afma.co.za) or contact admin@afma.co.za or 012 663 9097.

Act 36/1947 Training for the Feed Industry

AFMA hosted its first-ever Act 36 Training Course on 3 & 4 October 2024 at the AFMA Office in Pretoria. Designed to address the evolving regulatory and compliance needs of the animal feed industry, the course attracted overwhelming interest, with registrations fully booked within two hours.

The training, attended by 21 participants from various sectors, provided a comprehensive understanding of the regulatory framework under Act 36, equipping attendees with essential skills for compliance with legislation governing the farm feed manufacturing industry. The breakdown of participants included 19% full members, 52% associated members, 5% affiliated members, and 24% from other categories.

Facilitated by Mr. Herman van Zyl of Afri Compliance, whose 44 years of experience with Act 36 applications is invaluable, the course was praised for its in-depth knowledge and practical insights.

Feedback was overwhelmingly positive. Participants rated the content as highly relevant, appreciated the professionalism of the delivery, and commended the quality of the training materials. As a result, attendees are now better equipped to manage Act 36-related matters in their roles.

Due to strong demand, AFMA will offer another Act 36 Training Course in October 2025.

AFMA EVENTS

The AFMA Symposium 2024

Held on 31 October at the CSIR International Convention Centre, the AFMA Symposium 2024 brought together 480 delegates from animal nutrition and broader agricultural industries. This flagship event reaffirmed its status as the premier gathering for industry professionals, delivering a full day of insights, networking, and innovation.

With the theme "*Innovate for Success in Disruptive Times*", the symposium addressed the pressing challenges and emerging opportunities shaping the feed and agricultural sectors. Through thought-provoking discussions, the event equipped delegates with tools to navigate and thrive in an ever-changing landscape.

The day concluded with the Meet and Greet Cocktail Function, a vibrant networking opportunity where attendees exchanged ideas, built valuable relationships, and explored future collaborations that will shape the animal feed industry.

AFMA extends heartfelt thanks to all the delegates, sponsors, and speakers who contributed to this event to be successful. Your participation underscores AFMA's commitment to fostering collaboration and driving innovation in the industry.



Speakers in Session 1: *From policy to plate: Innovative solutions for success in disruptive times* – from left to right: Dr Burak Sarpel Ruperez, Prof Theo Venter, Chantelle Fryer (Session Moderator) and Dr David Bravo.



Speakers in Session 2: *Nutritional innovations for optimized performance* – from left to right: Manu De Laet, Gay Boomgaard (Session Moderator) and Natasha Snyman.

(Next page)

The AFMA Symposium 2024 (continued)



Speakers in Session 3:
Animal health & feed safety unleashed –
from left to right: Michel Bradford (Session Moderator), Caitlyn de Vos, Dr Lysiane Duniere and Prof Peter Surai.

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AFMA Symposium 2024 31 October 2024

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KEYNOTE SPEAKERS



Prof Theo Venter
Professor of Practice, University of Johannesburg, South Africa

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Dr Burak Sarpel Ruperez
Technical Sales Manager EMEA, Spain

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AFMA Student Awards 2024

AFMA proudly acknowledges the contributions of young talent in the animal feed industry through its annual student awards, which celebrate excellence across three categories: the AFMA Student of the Year award, the Intervarsity Writers Cup, and the new AFMA Student Research Poster Expo award. These awards demonstrate AFMA's commitment to fostering the next generation of leaders in animal science.

AFMA Student of the Year Award (Koos van der Merwe Award)



This prestigious award celebrates the legacy of Dr. Koos van der Merwe, a pioneer in the South African animal feed industry. Through his scientific approach and visionary leadership, Dr. van der Merwe significantly advanced the field. In honour of his contributions, AFMA continues to inspire future industry leaders by recognising outstanding students in animal nutrition.

Winner: Jamie Fourie (University of Pretoria)

Runners-Up: Millicent Mokonyama (North-West University) and Anri Pienaar (University of Pretoria)

Intervarsity Writers Cup (IWC)



Launched in 2017, the Intervarsity Writers Cup reflects AFMA's commitment to training and skills development by fostering writing excellence among animal nutrition students. This initiative encourages young professionals to engage with critical industry topics while honing their communication skills.

Congratulations to this year's winner, **Michael van Schalkwyk** from Stellenbosch University, for his outstanding contribution. In addition, we congratulate Stellenbosch University for winning the Intervarsity Writers Cup competition for a second consecutive year!

AFMA Student Research Expo



Launched at the AFMA Symposium 2024, the AFMA Student Research Expo provided students with a platform to showcase their research posters and connect with industry leaders. This first-of-its-kind initiative fostered engagement, knowledge-sharing, and innovation, sparking meaningful conversations about the future of animal nutrition and agriculture.

Congratulations to this year's winner, **Anel van der Merwe** from Stellenbosch University, for her excellent contribution!

View Anel and the other students' posters [here](#).



Watch **Jamie Fourie's** presentation on "The determination of the acid-binding capacity of various limestones and the subsequent impact on proximal gastrointestinal tract pH, calcium and phosphorous digestibility in the presence and absence of phytase".



Watch **Michael's** presentation on "The effect of dietary chitinase on feed quality of extruded abalone pellets".

The AFMA Matrix

We are excited to announce that the next edition of The Matrix magazine will be launched on 12 December 2024. Be sure to keep an eye out!

Get the AFMA Matrix in a PDF format on WhatsApp by messaging 064 890 6941 with the reference "AFMA Matrix 2024". To receive your Matrix via email,

send a message to Beauty Mthombeni at beauty@plaasmedia.co.za.

If you have missed any previous editions, you can access them [here](#).

About AFMA

The Animal Feed Manufacturers Association (AFMA) is the official representative body of the South African feed industry in the livestock and poultry sector and plays a pivotal role in the larger agricultural environment. AFMA's membership comprises animal feed and

ingredient manufacturers and suppliers of essential services such as feed ingredients and related services such as consultants, laboratories, and feed-system installations. Collectively, AFMA members produce 100% of the broiler feed and represent 60% of the total animal feed manufactured

in South Africa. AFMA provides a unified voice and promotes the animal feed industry as an integral part of the food chain ensuring the production of safe, nutritious, and affordable food for all.

For more information on AFMA please visit www.afma.co.za.

Season's Greetings

May this festive season bring you and your loved ones peace, joy, and much-needed rest. We look forward to an exciting 2025 filled with opportunities to innovate, collaborate, and grow together. Wishing you a Merry Christmas and a prosperous New Year!



Merry Christmas
& HAPPY NEW YEAR

As 2024 draws to a close, we extend our heartfelt gratitude to everyone who contributed to the success of AFMA this year.

Your support and dedication have been invaluable.

Wishing you and your loved ones a joyful festive season filled with peace, happiness, and blessings. Here's to continued success in the year ahead!

**THE AFMA CHAIRPERSON, BOARD OF DIRECTORS,
EXECUTIVE DIRECTOR AND OFFICE STAFF**

The AFMA office closes on 20 December 2024 and reopens on 6 January 2025.

Contributors to the AFMA Member Update

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STAY INFORMED

AFMA encourages you to stay up to date on the latest news, industry updates, and upcoming events.

With just a quick click on the links, you'll have access to information that will keep you informed and connected with the animal feed and agricultural industries. Don't miss out on any important updates!