

*Celebrating 80 years of excellence
in the animal feed industry*

CHAIRMAN'S REPORT 2024/25

Presented by Anina Hunter at AFMA's
78th AGM hosted at The Capital Zimbali,
KwaZulu-Natal on 5 September 2025



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Letter from the Chairperson



Anina Hunter
AFMA Chairperson

Since our establishment, AFMA has become a central force uniting stakeholders, advancing industry practices, and driving food security under our vision: *“To be a dynamic thought leader in animal feed, influencing food security through partnerships with all stakeholders, ensuring ‘Safe Feed for Safe Food.’”*

The South African Animal Feed Industry: Celebrating 80 Years & Looking Ahead

This year, AFMA celebrates 80 years of growth, resilience, and service to the animal feed industry in South Africa. Since our establishment, AFMA has become a central force uniting stakeholders, advancing industry practices, and driving food security under our vision:

“To be a dynamic thought leader in animal feed, influencing food security through partnerships with all stakeholders, ensuring ‘Safe Feed for Safe Food.’”

Looking to 2050: Preparing for the Future

With the global population projected to exceed 9 billion by 2050, food production must increase by at least 60%. AFMA and its members have a critical role to play in meeting this demand – ensuring that animal proteins like poultry, beef, and pork are produced in a sustainable, affordable, and safe way, while maintaining consumer trust and regulatory compliance.

Industry Collaboration and Innovation

We continue to build a collaborative environment that brings together academia, regulators, and producers. This network promotes knowledge sharing and evidence-based solutions that help improve practices across the feed and livestock industries. In the past year,

we have strengthened partnerships across the agricultural value chain, ensuring AFMA remains the voice of our industry.

Success Story: The Soya Bean Industry

One of our notable contributions has been evaluating the impact of the soya meal import duty, which was introduced to support local soybean cultivation and attract investment in crushing facilities. From importing 80% of our needs, South Africa has now become self-sufficient in soya meal – a remarkable achievement that marks one of the greatest agricultural success stories of the past decade. As the industry reaches maturity, it's time to consider whether the duty has fulfilled its purpose.

Defending Biosecurity and Livestock Health

AFMA plays a key role in disease prevention efforts. Outbreaks of African Swine Fever, Foot and Mouth Disease, and Avian Influenza threaten livestock health, feed demand, and national food security. Biosecurity must remain a top priority, with support from government in border protection, phytosanitary regulation, and vaccine approval. Notably, South Africa recently placed its first vaccinated flocks following Minister Steenhuisen's announcement on Avian Influenza.

Addressing Infrastructure Challenges

Operational efficiency and competitiveness continue to be challenged by port delays, road and rail deterioration, and utility disruptions. These infrastructure issues require urgent attention to safeguard the long-term viability of our sector.

Investing in the Future: Youth Development

AFMA recognizes that the youth of today are the industry leaders of tomorrow. Through educational initiatives and student engagement programmes, we are investing in the next generation of agricultural professionals – ensuring they are equipped with the knowledge, skills, and values required to lead with impact.

As we reflect on AFMA's 80-year legacy, we reaffirm our commitment to leading the way forward. The animal feed sector will continue to play a central role in delivering safe, sustainable, and nutritious food for a growing global population.

Thank you to our members, partners, and the AFMA team for your continued commitment and dedication to this essential industry.

Warm regards,

Anina Hunter
Chairperson



Introduction

The AFMA Chairman's Report provides a high-level strategic overview of the Animal Feed Manufacturers Association's (AFMA) activities, challenges, achievements, and industry performance over the 2024/25 period. The report serves as an accountability and leadership tool to members and stakeholders, reinforcing AFMA's role in shaping the feed industry in South Africa. The 2024/25 Chairman's Report

is presented at a particularly significant time in AFMA's history, as we proudly commemorate 80 years of existence. Since its establishment in 1945, AFMA has evolved into a leading organization within South Africa's agricultural value chain serving as the voice of the animal feed industry and advocating sustainable, and economically viable feed production.

1.1 Organisational Mission and Vision

The AFMA's vision 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 association has strategically positioned itself as the animal feed thought leader influencing food security through partnerships with all industry stakeholders. AFMA contributed within the agricultural value chain to lobby, liaise, and collaborate with government departments, policy and regulatory decision makers, agricultural forums, academia, international agencies, and related stakeholders.

AFMA strives for the realisation of its vision by:

- Lobbying, liaising and cooperating with industry role players.
- Providing management information to members, industry and other role players.
- Influencing and managing factors that have a bearing on industry costs.
- Creating awareness among industry role players about threats and opportunities facing the industry and formulating unified action plans.
- Providing training and skills development opportunities to equip the industry with a continuous pipeline of skilled workforce.
- Promoting AFMA's image of "Safe Feed for Safe Food".

1.2 Reflection on the Year

As we reflect on the 2024/25 production year, we are pleased to report that South Africa's animal feed industry has shown remarkable resilience and growth. Our **total feed production** reached just **over 7 million tons**, up from 6.77 million tons the previous year. This growth is not just a number, but it reflects the collective efforts of our members, the strength of our value chains, and the growing demand across key sectors. We've seen encouraging **increases in feed volumes** for several categories: **dairy feed** grew by **4,3%**, **pig feed** by **4,4%**, **layer feed** by **5,3%**, and **broiler feed** by **3,6%**. Even more striking were the gains in **dog food**, which jumped by an extraordinary **103,5%**, as well as **ostrich feed**, which surged by **97,4%**, and **game feed**, up by **38,6%**. These trends point to evolving market dynamics, diversification, and opportunities that AFMA members are seizing across both traditional and niche markets.

But we must also acknowledge the difficult realities we continue to face. Interrupted power and water supply, aging infrastructure, transport and logistic restraints, and regulatory bottlenecks remain serious constraints on our industry's potential. Rising input costs, climate risks, and global volatility also continue to test our agility. Despite these hurdles, the feed industry's upward trajectory underscores its strategic importance in supporting national food security, livestock health, and economic development. As we reflect on this progress, it is essential that we continue advocating for policy coherence, investment in infrastructure, and public-private partnerships to safeguard the industry's sustainability and future growth.

> 7 million tons
total feed production

2023/24: 6.77 million tons

↑ 4,3%
dairy feed

↑ 4,4%
pig feed

↑ 5,3%
layer feed

↑ 3,6%
broiler feed

↑ 103,5%
dog food

↑ 97,4%
ostrich food

↑ 38,6%
game food



1.3 Acknowledgement of stakeholders

AFMA's continued progress and impact would not be possible without the strong partnerships and collaboration across multiple sectors of the agricultural value chain. We wish to express our sincere appreciation to all stakeholders who have actively contributed to advancing the objectives of the animal feed industry. This includes our valued partners in the **grain and oilseed value chains** particularly the Maize Forum and Steering Committee, the Oilseed Value Chain, JSE Commodity Advisory Committees, Agricultural Trade Forums, the Grain and Oilseeds Value Chain Round Table, and the Crop Estimates and Liaison Committees.

We also acknowledge the critical role played by stakeholders in the **livestock value chain**, such as the AMR Industry Alliance, and the National Biosecurity Hub for fostering collaboration on animal health and biosecurity matters. This year AFMA joined the Livestock Value Chain Round Table (LVCRT) with other livestock producer organisations and the National Department of Agriculture (NDA) to advance livestock production in South Africa and tackle cross-cutting issues that limits growth and the provision of affordable animal protein.

In the **transport, logistics, and trade sectors**, we regularly engage with entities such as Transnet, International Trade Administration Commission (ITAC), South African Revenue Services (SARS), Johannesburg Stock Exchange (JSE), South African Cereals and Oilseeds Trade Association (SACOTA), and the Department of Trade, Industry, and Competition (DTIC).

Ongoing involvement with stakeholders in the Strategic Agricultural Inputs Forum (SAIF), the Animal Feed Forum (AFF) and the Inspection Compliance Forum (ICF) in partnership with the Department of Agriculture, is instrumental in creating an enabling legislative environment that supports manufacturing and enhances the provision of critical **agricultural inputs** for production.

Finally, our role in national strategic initiatives such as the **Agriculture and Agro-processing Master Plan (AAMP)** and the Poultry Master Plan (PMP) has reaffirmed AFMA's commitment to public-private partnerships aimed at securing food systems, enhancing competitiveness, and supporting inclusive economic growth. These efforts underscore our belief that collaboration is the cornerstone of resilience and progress in the animal feed industry.

1.4 Looking Ahead

Looking ahead, our priority is to build on the industry's growth by addressing persistent challenges like logistical inefficiencies, rising input costs, energy instability, and legislative constraints. We will continue to drive innovation, promote sustainability, and adapt to shifting consumer expectations around animal welfare and environmental impact. Through collaboration, data-driven and science-based decisions, and a shared vision, we are committed to securing a resilient and competitive future for the South African feed industry.



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AFMA Strategy

During this year, AFMA continued its strategic focus around **four key objectives**:

1

Providing an affordable feed supply

Ensuring the **consistent** supply of **sufficient** and **affordable** animal feed for the production of meat, milk, eggs and fish.

2

Enabling innovative animal nutrition for sustainable animal production

Using innovative nutritional strategies to produce **nutritious** animal feed in a **responsible** and sustainable way.

3

Ensuring safe feed for safe food through strengthened self-regulation

Promoting **good manufacturing practices** in the provision of **safe** feed to enhance **consumer confidence**.

4

Enhancing training and skills development within the industry

Supporting **job creation**, **training opportunities** and **skills development** in the animal feed industry.



These **four strategic pillars** form the foundation of AFMA's operational and advocacy work, guiding all activities towards a common goal which is to unlock growth and sustainability across South Africa's agricultural value chain. To achieve these outcomes, AFMA is committed to:

- Ensuring a consistent and affordable supply of quality animal feed to support the production of animal proteins.
- Promoting the responsible application of innovative nutritional science and technology within an enabling legislative framework.
- Strengthening feed safety and industry credibility through good manufacturing practices and a proactive self-regulation mechanism.
- Supporting inclusive economic development through job creation, vocational training, and upskilling across the formal feed sector.





To put the strategy to practice, AFMA identified a number of projects with specific outcomes that will drive progress:

- Reducing import tariffs for soya oilcake to provide affordable feed supply and support poultry production.
- Introducing a transparent pricing mechanism for soya oilcake through listing futures on JSE.
- Implementing updated animal feed nutrient standards to support innovation and improved environmental sustainability.
- Introducing a new feed legislative framework that supports the provision of safe animal proteins for consumers and encourage growth and innovation in the agro-processing sector.
- Reducing the regulatory burden of manual submissions to Act 36 through implementation of an electronic submission system.
- Promoting adequate nutrition as an effective measure to reduce the reliance on antimicrobials in food producing animals in support of a One-health strategy.
- Modernization of the AFMA Code of Conduct and independent compliance audits of facilities that aligns with the new feed legislative framework.
- Enhancing training initiatives for feed mill operators via a blended learning program to address skills development in the sector.
- Fostering collaboration with tertiary institutions in South Africa to address research needs in animal nutrition that drives innovation.
- Implementing a new website and integrated member management system for improved communication that supports service delivery to the industry.



A more detailed report on each of the strategic projects are available within the respective Committee sections in the Chairmans' report.

These strategic imperatives position AFMA to play a meaningful role in addressing the country's food security, supporting inclusive agricultural development, and enhancing the competitiveness and sustainability of South Africa's livestock and poultry industry.

To put the strategy into practice, AFMA identified several outcome-driven projects to drive progress, including the introduction of a transparent pricing mechanism for soya oilcake through listing futures on the JSE.





The Animal Feed Situation

The global animal feed industry plays a critical role in supporting the agriculture and livestock and poultry value chain, supplying balanced nutrition to a wide variety of species, including poultry, pigs, dairy and beef cattle, aquaculture, ostriches, game, pets, and horses. Over the past decade, the global animal feed market has experienced significant expansion, driven by population growth, rising incomes, urbanisation, and a shift in dietary preferences toward higher-protein foods. The growing global appetite for animal products has fuelled a continuous rise in feed demand, creating opportunities for innovation in feed formulation, sustainable ingredient sourcing, and improved production technologies. As the industry faces increasing pressures related to sustainability and disease management, it remains crucial to global food security and rural economic development.

3.1 The Global Feed Situation

Livestock and poultry farming, as well as the consumption of animal products, contribute significantly to the economic and nutritional well-being of millions of people. Animal feed is the most essential input for ensuring a safe and affordable supply of animal protein. Beyond providing vital nutrition, the animal feed sector supports rural livelihoods, strengthens global food security, and plays a critical role in advancing more sustainable and efficient livestock production systems. **Table 1** highlights the top 10 feed-producing countries for 2024. China remains the largest producer, followed by the USA, Brazil, India, and Mexico. Notably, Russia recorded the highest growth rate among the top producers (8,5%), driven by strong expansions in its pig sector. Other countries, including Turkey (4,8%), India (4,6%), and Vietnam (3,4%), also showed solid growth, while China experienced a slight decline of 2,0% in total production. In

Russia, the sharp increase was fuelled by significant government support for pig farming, aiming to boost self-sufficiency and reduce pork imports. India's growth was supported by strong domestic demand for dairy and eggs, as well as increasing infrastructure investments. Turkey's growth in feed production was driven primarily by a 21% surge in dairy feed demand due to increased heifer imports and herd expansion, while Vietnam's growth reflected rapid modernisation and a strong rebound in the dairy and aquaculture sectors. In contrast, China's decline was mainly due to oversupply issues, weaker pig and dairy markets, and ongoing disease challenges, despite growth in its broiler and pet feed segments. These trends illustrate the dynamic nature of global feed production and reflect how major producing countries continue to adapt to shifting market demands, biosecurity challenges, and evolving consumer preferences.

Table 1: Global Feed Production Ranking – 2024

Rank	Country	Total Feed Production		Growth	
		2023	2024	Tons	%
1	China	321,5	315,0	-6,52	-2,0%
2	U.S.	267,8	269,6	1,83	0,7%
3	Brazil	84,6	86,6	2,05	2,4%
4	India	52,8	55,2	2,41	4,6%
5	Mexico	40,8	41,4	0,56	1,4%
6	Russia	35,5	38,5	3,03	8,5%
7	Spain	35,5	36,0	0,52	1,5%
8	Vietnam	25,0	25,9	0,85	3,4%
9	Turkey	23,4	24,5	1,13	4,8%
10	Japan	24,3	24,3	0,03	0,1%

Source: Alltech – 2025



On a regional level, Asia-Pacific remains the largest feed-producing region in the world, recording a total of 519 million metric tons in 2024, although it saw a slight overall decline driven by a 3,3% decrease in pig feed production and lower beef feed volumes in China. Dairy feed in Asia-Pacific, however, grew by 2,4% as consumption and exports increased. Latin America showed strong growth, producing nearly 195 million metric tons, supported by a 3,8% rise in pig feed and a 4,7% increase in layer feed, particularly in Brazil. Europe rebounded to 247 million metric tons, with dairy feed up 4,7% after several years of decline and beef feed growing by 2,3%. Africa and the Middle East together produced 326 million metric tons, with Africa alone growing by 7,2%, including a notable 25,7% increase in dairy feed. North America produced 279 million metric tons, reflecting gains in broiler and pig feed. Oceania produced 10 million metric tons, with beef feed up by 11,1% due to increased feedlot usage in Australia and aquaculture feed rising by 9,3%.

Table 2 below provides a detailed breakdown.

Table 2: Total Feed Production per Region – 2024

Region	Broiler	Pig	Layer	Dairy	Beef	Aqua	Pets	Equine	Total
Africa	17,67	2,82	8,47	8,28	6,77	1,73	1,32	0,46	47,52
Asia-Pacific	161,47	183,56	82,96	29,86	19,75	37,07	4,16	0,39	519,23
Europe	55,95	76,32	30,96	47,45	18,00	4,78	11,73	2,07	247,26
Latin America	73,58	40,81	26,22	22,75	15,37	6,83	8,36	0,80	194,70
North America	13,00	0,01	6,64	7,21	2,05	1,02	0,11	0,12	30,14
Middle East	59,57	64,47	16,82	48,32	71,31	1,31	11,44	5,35	278,58
Oceania	4,17	1,32	0,97	1,64	0,80	0,24	0,58	0,44	10,16
Total	385,42	369,29	173,04	165,50	134,05	52,97	37,69	9,63	1327,59

Source: Alltech – 2025

Looking at the share of species in global feed production in 2024, poultry feed remained the largest segment. **Broiler feed** accounted for approximately 27,6% of total global production (385 million metric tons), supported by continued global consumer preference for affordable and versatile chicken meat. Asia-Pacific led in broiler feed volumes (161 million tons), despite facing disease pressures and cost challenges, while Latin America and Europe also showed strong growth due to domestic demand and exports. Pig feed ranked second at 26,4% (369 million tons), driven largely by Asia-Pacific (184 million tons) and Europe (76 million tons). However, the pig sector showed regional disparities. Asia-Pacific experienced a 3,3% decline, mostly in China, due to oversupply and disease issues, while Europe and Latin America posted solid growth supported by exports and lower feed costs.

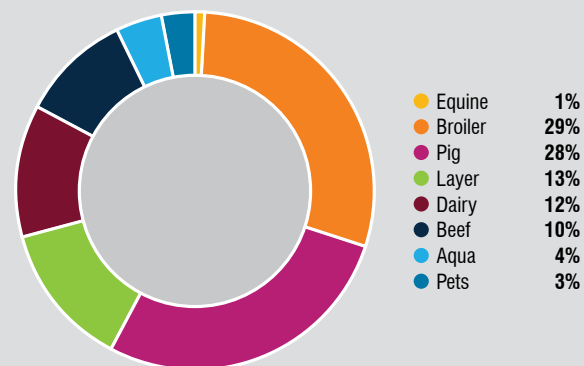
Layer feed made up 12,4% (173 million tons), with Asia-Pacific remaining the largest region as egg consumption continued to rise, particularly in India and Southeast Asia, due to affordability compared to other proteins. Dairy feed represented 11,9% (166 million tons), driven by strong demand in Europe and a remarkable 25,7% increase in Africa, reflecting a shift from smallholder grazing systems toward more commercial, formulated rations.

Beef feed accounted for 9,6% (134 million tons), with North America leading at over 71 million tons, supported by drought-driven feedlot finishing and strong domestic beef prices. Aquaculture feed contributed 3,8% (53 million tons), with Asia-Pacific still dominating despite a decline in some regions due to environmental and disease challenges.

Pet food continued to grow, making up 2,7% (38 million tons), fuelled by premiumization trends and strong growth in Africa (+60%) and Asia-Pacific (+11%), reflecting rising pet ownership and “humanization” of pets.

Finally, **equine feed** remained a niche segment at 0,7% (9.6 million tons), with growth supported by increasing equestrian sports interest and leisure horse ownership in regions like Europe and Latin America. These figures from the Alltech 2025 Agri-Food Outlook illustrate not only the dominant role of poultry and pig sectors but also highlight the influence of shifting consumer preferences, disease pressures, export dynamics, and sustainability-driven changes in regional livestock and feed systems worldwide.

Figure 1: Global Feed Production by Species – 2024



Source: Alltech – 2025

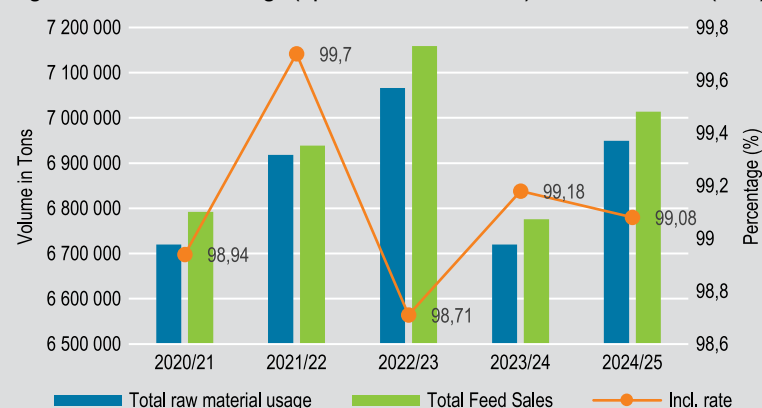


3.2 Domestic Feed Situation

The section provides an overview of the trends and dynamics within the South African feed industry, with a particular focus on raw material usage and feed production in 2024/25. The data indicates a substantial increase in raw material usage, peaking in 2022/23, followed by a stabilization at approximately 6.9 million tons, highlighting the industry's capacity for efficient raw material conversion, as evidenced by consistently high inclusion rates exceeding 98,7%. Maize remains the predominant raw material, constituting over half of the total raw material usage throughout the period, reflecting its critical role in feed formulation. Oilcakes also maintain a stable contribution, whereas fish meal's minimal and declining share suggests limited use, potentially due to economic or sustainability considerations. Concurrently, feed production has experienced notable growth, driven by sector-specific increases, such as in dog food, ostrich, and game feeds, highlighting diversification within the industry. Analyzing the relationship between domestic feed supply and chicken imports reveals an inverse correlation, indicative of shifts in local poultry production and market self-sufficiency. Additionally, provincial data highlights regional specialization, with Western Cape leading in dairy and pig feeds, and Gauteng dominating layer and horse feeds. Collectively, these trends reflect an industry that is both resilient and adaptable, responding to market demands and regional strengths over the analyzed period.

3.2.1 Raw Material Utilization

Figure 2: Raw Material Usage (April 2020 – March 2025) – AFMA Members (Tons)

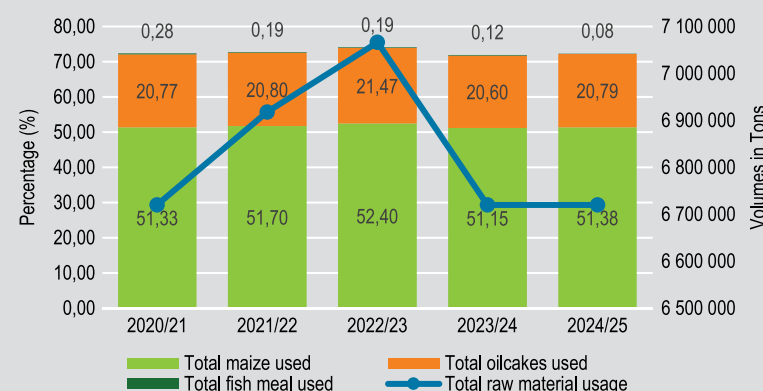


Source: AFMA feed production statistics – 2024/25

Figure 2 illustrates the total raw material usage, total feed production, and inclusion rate for the periods 2020/21 to 2024/25. The total raw material usage showed a marked

increase from 2020/21 to 2022/23, followed by a decline in 2023/24 and 2024/25, stabilizing at just over 6.7 million tons. Similarly, total feed production followed a comparable trend, reaching a high of 7.01 million tons in 2024/25. The inclusion rate remained high throughout, fluctuating marginally between 98,71% and 99,7%, indicating efficient conversion of raw materials into feed products. Overall, the feed industry's reliance on maize and oilcakes remains significant and steady, while the minimal use of fish meal suggests its limited role, possibly due to cost or sustainability concerns.

Figure 3: Usage of Maize, Oilcake and Fishmeal by AFMA Members



Source: AFMA feed production statistics – 2024/25

Figure 3 presents the composition and total volumes of key raw materials used in feed production between 2020/21 and 2024/25. The three primary raw materials include maize, oilcakes, and fish meal shown in percentages. Throughout the five-year period, maize consistently constitutes the largest proportion of raw material use, ranging narrowly between 51,15% and 52,4%. The highest maize usage was reported in 2022/23 at 52,4%, aligning with the peak in total raw material of approximately 7.05 million tons. Oilcakes maintain a relatively stable contribution, varying slightly between 20,6% and 21,47%, peaking again in 2022/23. Fish meal, while essential, makes up a small proportion declining marginally from 0,28% in 2020/21 to 0,08% in 2024/25.

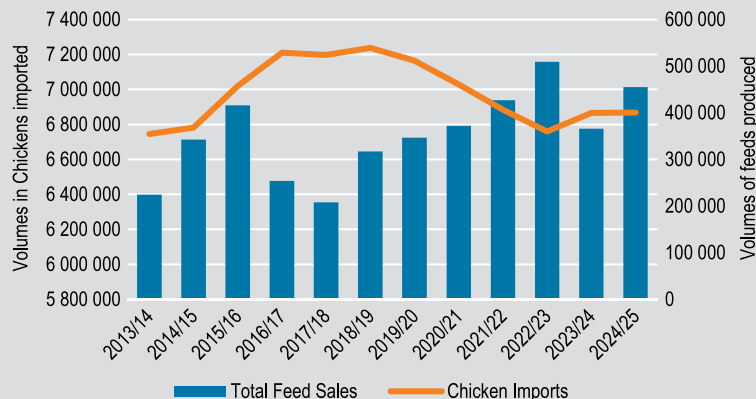
3.2.2 Animal Feed Production Supply

Figure 4 on the next page illustrates the trend of AFMA total feed production alongside chicken imports in South Africa over the years 2013/14 to 2024/25. A comparative analysis reveals an inverse relationship in several periods between domestic feed production and chicken imports, suggesting possible substitution effects or shifts in local poultry production dynamics. From 2013/14 to 2015/16, total feed production increased steadily from approximately 6.4 million tons to 6.9 million tons, while chicken imports also rose sharply, peaking at 528,506 tons in 2016/17. However, in 2016/17 and 2017/18,



feed production declined to 6.48 and 6.35 million tons respectively, coinciding with the highest levels of chicken imports at over 524,000 tons. This suggests a weakening in local poultry production during this period, potentially due to other market pressures from imports. A rebound in feed production is observed from 2018/19 onwards, with a notable increase to over 7.1 million tons in 2022/23. This recovery in feed demand indicates a resurgence in domestic livestock and poultry production, which aligns with a consistent decline in chicken imports over the same period from 539,297 tons in 2019/20 down to 360,252 tons in 2023/24. In 2024/25, feed production remains robust at over 7 million tons, while chicken imports stabilize at around 394,000 tons. Overall, the increased domestic feed production has played a critical role in supporting local poultry production, contributing to a gradual decline in reliance on chicken imports over the past decade.

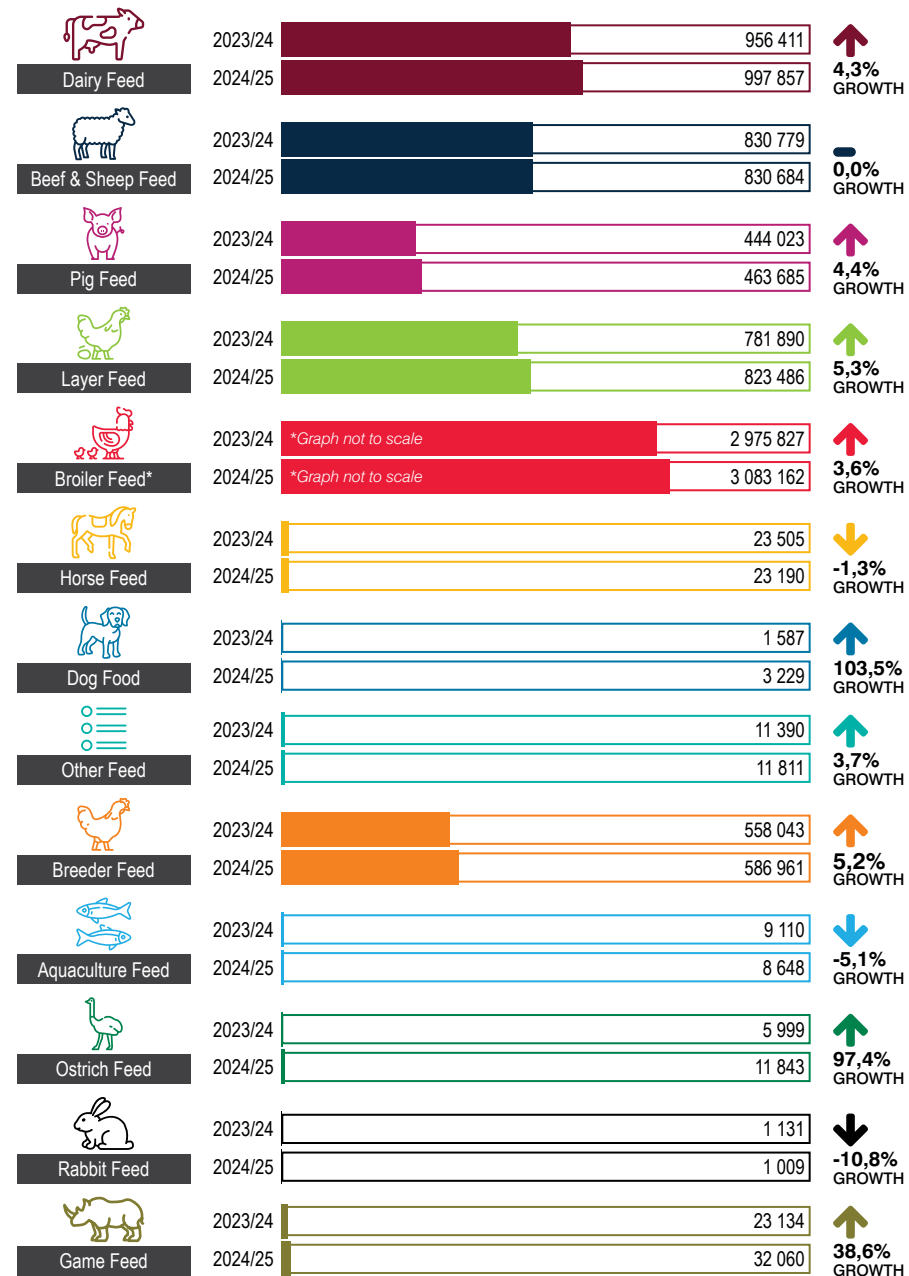
Figure 4: Total AFMA Feed Production vs Chicken Imports (Tons)



Source: AFMA feed production statistics and Quantec easy data – 2024/25

During the 2023/24 production season, AFMA reported a total feed production volume of 6,775,605 tons. This figure experienced an increase in the subsequent period, reaching 7,013,605 tons in 2024/25. The notable growth in feed production can be primarily attributed to several key sectors. Dairy feed production saw an increase of 4.3%, while pig feed production grew by 4.4%. Layer feed production expanded by 5.3%, and broiler feed increased by 3.6%. Additionally, the dog food segment experienced a remarkable surge of 103.5%, indicating heightened demand or market expansion. Breeder feed production rose by 5.2%, and ostrich feed demonstrated an exceptional increase of 97.4%. Furthermore, game feed production grew significantly by 38.6%. These developments reflect a robust and expanding feed industry, driven by increased agricultural activity and evolving consumer preferences within these sectors.

AFMA Feed Production from 2023/24 to 2024/25 (April-March)(Tons)



Source: AFMA feed production statistics – 2024/25

**Table 4: Feed Production per Province (%)**

	EC	FS	GP	KZN	LP	MP	NW	SADC	WC
Dairy Feed	22,93	6,48	1,48	23,92	0,02	3,23	2,08	0,12	39,74
Beef & Sheep Feed	3,17	12,08	0,98	27,65	0,61	37,62	2,32	3,37	12,19
Pig Feed	3,84	25,55	8,61	7,86	0,42	12,35	7,60	3,21	30,54
Layer Feed	3,46	22,22	25,11	6,09	1,31	12,08	13,12	2,36	14,25
Broiler Feed	5,64	15,50	18,84	8,55	3,12	15,76	13,93	3,83	14,83
Horse Feed	2,42	-	63,76	0,46	12,54	14,96	-	3,46	2,39
Dog Food	-	-	3,78	-	32,72	-	0,99	-	62,51
Other Feed	0,02	20,96	5,74	2,93	2,61	11,47	-	54,73	1,55
Breeder Feed	4,61	6,08	24,76	17,92	0,20	11,62	6,89	15,05	12,86
Aquaculture Feed	-	-	31,44	-	-	-	-	-	68,56
Ostrich Feed	1,17	-	1,78	-	0,62	1,55	-	-	94,87
Rabbit Feed	9,11	0,20	82,48	0,40	0,89	1,09	-	5,84	-
Game Feed	0,73	13,43	12,25	0,26	11,49	29,12	0,57	7,35	24,78
Total	7,33	14,37	14,64	13,25	1,77	16,10	9,49	3,99	19,07

Source: AFMA feed production statistics and Quantec easy data – 2024/25

Table 4 highlight the provincial feed production as reported by AFMA. The data indicates that Western Cape (WC) leads AFMA total feed production with a 19,07% share, followed by Mpumalanga Province (MP) at 16,10%, Gauteng Province (GP) at 14,64%, and the Free State (FS) at 14,37%. These provinces are central to the AFMA feed sector, reflecting both livestock density and feed manufacturing capacity. Limpopo Province (LP) and SADC regions contribute the least at 1,77% and 3,99%, respectively. The WC is predominant in **dairy feed production**, accounting for 39,74%, highlighting its strong dairy industry, with KZN and EC following at 23,92% and 22,93%, respectively. In the **beef and sheep feed** sector, MP leads with 37,62%, with KZN contributing 27,65%, aligning with the prominence of cattle and sheep farming in these regions. The WC emerges as the top producer of **pig feed** at 30,54%, closely followed by FS at 25,55% and GP at 8,61%, reflecting key pork production hubs.

For **layer feed**, GP leads with 25,11%, while FS and WC follow at 22,22% and 14,25%, indicating concentrated egg production in urban and peri-urban areas. **Broiler feed** production is distributed among GP (18,84%), MP (15,76%), FS (15,50%), and WC (14,83%), demonstrating a robust industry across these provinces. GP dominates the **horse feed** segment with 63,76%, likely due to its racing and horse industries, with MP and LP also contributing at 14,96% and 12,54% respectively. The **dog food** production is centered in WC, which accounts for 62,51%, followed by LP at 32,72%. The SADC region collectively contributes 54,73% to **other feed** production, possibly driven by export activities, with FS and MP contributing 20,96% and 11,47%, respectively. **Breeder feed** production is led by GP at 24,76%, with KZN and WC also significant at 17,92%

and 12,86%. **Aquaculture feed** production is primarily concentrated in GP and WC, representing 31,44% and 68,56%, respectively, indicating limited but geographically focused aquaculture activities. In **ostrich feed**, WC dominates with 94,87%, consistent with its well-established ostrich farming industry. **Rabbit feed** is predominantly produced in GP accounting for 82,48%, with EC contributing 9.11%, highlighting niche but focused rabbit farming. Lastly, **game feed** production is significant in MP (29,12%), WC (24,78%), and FS (13,43%), reflecting the importance of game farming and wildlife tourism in these regions.

3.2.3 National Animal Feed Production

In the 2024/25 period, the total national animal feed production reached approximately 12,450,363 tons, reflecting a significant contribution from AFMA, which produced about 7,248,984 tons. This accounts for approximately 58,22% of the national production, marking an improvement from the 57,89% contribution observed in the 2023/24 period. Breakdown of feed types indicates that AFMA broiler feed production dominates, constituting about 99,82% of national broiler feed production, followed by aquaculture feeds at 90,94%, layer feeds at 85,52%, pig feeds at 42,80%, dairy feeds at 38,29%, and beef & sheep feeds at 33,87%. Overall, the data reflects a resilient and growing feed manufacturing sector, with AFMA continuing to be a key player in strengthening animal nutrition, supporting livestock productivity, and contributing to the sustainability of the animal feed industry.

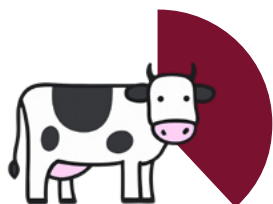
Table 5: AFMA feed contribution to National Feed Production

Feed Type	AFMA – Feeds Plus, Feeds Derived from Concentrates	** National Feed Production	AFMA Feed as % of National Production
Dairy	1 033 877	2 700 057	38,29
Beef & Sheep	1 084 947	3 203 291	33,87
Pigs	517 010	1 207 871	42,80
Layers	860 574	1 006 295	85,52
Broilers	3 673 606	3 680 328	99,82
Dogs	3 229	396 604	0,81
Horses	23 190	137 099	16,91
Ostriches	11 843	109 308	10,83
Aquaculture	8 648	9 510	90,94
Other	32 060	-	
Total	7 248 984	12 450 363	58,22

Source: Dr Erhard Briedenmann – Modelling



AFMA Feed Contribution to National Feed Production



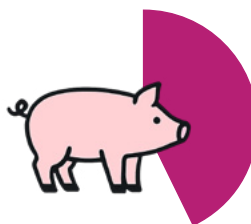
Dairy
38,29%

1 033 877



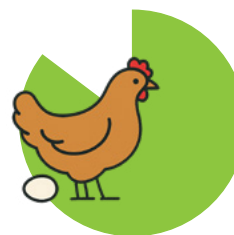
Beef & Sheep
33,87%

1 084 947



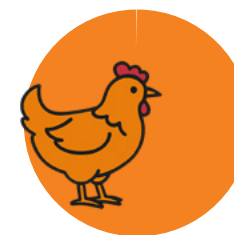
Pigs
42,80%

517 010



Layers
85,52%

860 574



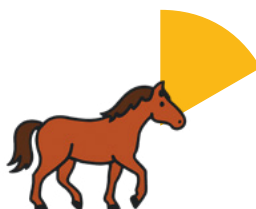
Broilers
99,82%

3 673 606



Dogs
0,81%

3 229



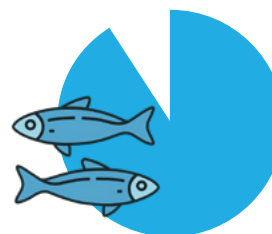
Horses
16,91%

23 190



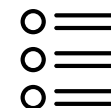
Ostriches
10,83%

11 843



Aquaculture
90,94%

8 648



Other
-

32 060

Total: 7 248 984



Trade Committee Matters



Chairperson: Mr Ruan Stander
(Meadow Feeds)



Vice-chairperson: Mr Paul Saunders
(Sovereign Foods)

4.1 Strategic Focus Areas

The **Trade Committee** continues to advance its strategic projects for the 2024/25 period, as these initiatives remain ongoing and have not yet completed. These focus areas are aligned with the AFMA strategy and support the Board of Directors' vision.

Soymeal Import Duty Review

This strategic focus is aimed at reviewing the import duty on soymeal by applying to ITAC to reduce the current 6,6% duty to 0%. The committee has made significant progress in consulting a broad range of industry stakeholders and appointing an independent consultant to conduct an economic study to assess the impact of the import duty review and the findings to serve as a supporting fact in submitting ITAC applications. DNA Economics has completed its economic study and was presented to all the stakeholders in the feed industry. During their time of conducting their study, relevant soya value chain role players have been consulted to ensure that the findings are representative.

JSE Soymeal Futures Contract

This project aims to explore the introduction of soymeal futures trading contract on South African Futures Exchange to ensure that there is a transparent pricing mechanism, facilitate better price discovery, and increase liquidity. A formalized trading platform

comes with an opportunity to attract wider participation, including international investors, and foster standardized pricing mechanism. To date, JSE has managed to secure the minimum storage capacity committed by the soybean crushers and the industry is currently reviewing the quality specifications while JSE prepares the details contract specifications.

4.2 Other trade matters

Maize Supplier Declaration

The newly identified focus area investigates the implementation of a grain passport system to support regulatory compliance of grains delivered at a feed mill. The implementation requires engagement with stakeholders (ongoing) and the creation of a standardized form where all relevant information will be recorded (drafted). The committee has yet to discuss the implementation plan for the passport system

Leaf Services

Leaf services faced industry wide

concerns regarding their operational practices, which raised questions about their ability and reliability to conduct inspection services in the grain industry. The Minister of Agriculture took a decision to revoke the designation of Leaf Services as an assignee of the Agricultural Product Standards Act 119 of 1990. This came after a comprehensive review of Leaf Services role, particularly concerning transparent consultation in setting inspection fees, and delays in the application of the Act. The additional concerns include absence of a substantiated methodology for fee determination, which would substantially raise costs and potentially impacting the prices of grain and oilseeds. The revocation of Leaf Service was/is with effective from May 27, 2025.

Copper sulphate

The International Trade Administration Commission (ITAC) has completed an investigation on a tariff increase on copper sulphate from 0% to 10% which was implemented in September 2024. Therefore, following this tariff increase of



10%, ITAC initiated an investigation on a possible rebate on copper sulphate import duties as it impacts the animal manufacturing sector. The rebate aims to mitigate the negative impact of the increased duty on the animal feed industry, ensuring consistent access of copper sulphate at a competitive price. The application and investigation concerning the rebate creation for copper sulphate

used in animal feeding is currently being processed by ITAC.

Wheat Dollar-Based Reference Price and trigger mechanism

ITAC is investigating a proposed increase in the dollar-based reference price for wheat including the potential implantation of an automatic trigger mechanism for wheat import tariffs. Grain SA and the

South African Cereal and Oilseed Trade Association have initiated the application which claimed that the current tariffs in insufficient to support local wheat production and self-sufficiency, and that increased production costs and competition from subsidized imports threaten local farmers. AFMA has provided its comments to ITAC which generally oppose the increase of

wheat DBRP due to the impact on price increase for the wheat by-products such as wheat bran, flour and straw which are used by feed manufacturers to produce feeds. However, AFMA supported implementation of automatic trigger mechanism whenever the global prices are below the local reference price. ITAC is yet to decide on this investigation.



ITAC is investigating a proposed increase in the dollar-based reference price for wheat including the potential implantation of an automatic trigger mechanism for wheat import tariffs.



Technical Committee Matters



Chairperson: Ms Gay Boomgaard
(Meadow Feeds)



Vice-chairperson: Ms Janke Bestbier
(Alltech Biotechnology)

5.1 Strategic Focus Areas

The **Technical Committee** continues to drive AFMA's second strategic pillar by championing innovative, science-based nutrition that delivers safe, sustainable feed. In 2024/25 the following key initiatives remained at the centre of the committee's efforts.



Nutrient Guideline Revision Project (NGRP)

Now in its final stages, the Nutrient Guideline Revision Project (NGRP) marks one of AFMA's most impactful contributions to the modernisation of South Africa's feed regulatory framework.

Developed through extensive scientific review, the updated nutrient guidelines reflect global alignment, local relevance, and practical industry application. These guidelines are intended to support the amended Act 36 farm feed regulations and will form the basis for minimum and maximum nutrient guarantees across all species. All marketed products will be required to reflect these guarantees on their labels, ensuring consistency and regulatory compliance. A user-friendly version of the guidelines are being prepared by AFMA to support practical implementation across the industry. A formal rollout is planned to align with the publication of the amended regulations, subject to the finalisation of the legislative process.

Antimicrobial Resistance (AMR) Alliance and Advocacy

Antimicrobial resistance (AMR) remains a critical global concern, and AFMA continues to prioritise AMR advocacy in alignment with South Africa's One Health strategy. The focus is on promoting responsible antimicrobial use to safeguard both animal and public health, while supporting the long-term sustainability of the feed sector.

In early 2024, AFMA and the South African Animal Health Association (SAAHA) co-hosted a national AMR workshop, which led to the formation of the AMR Alliance – a collaborative platform uniting veterinarians, producers, regulators, nutritionists, and policymakers to strengthen cross-sector engagement, support regulatory dialogue, and improve data transparency. The Alliance held its first meeting in early 2025, identifying priority actions including prescription-only access, improved treatment protocols, and enhanced surveillance.

South Africa's current National AMR Strategy (2018–2024) is under review, with a new Ministerial Advisory Committee (MAC) expected to be appointed in 2025 to draft an updated national action plan. Regulatory authorities – SAHPRA, DOA, and the Department of Health – are jointly reviewing legislation under Act 36 and Act 101. A government-led stakeholder dialogue was held in July 2025, with the AMR Alliance positioned to support evidence-based antimicrobial stewardship.

AFMA recognises the importance of a One Health, multi-sectoral approach to AMR and, as a member of the International Feed Industry Federation (IFIF), acknowledges the feed sector's critical role in supporting animal health and resilience through **safe, high-quality, and nutritionally balanced feed** – contributing meaningfully to reducing reliance on antibiotics.



5.2 Feed safety monitoring

AFMA's feed safety monitoring system is a proactive, industry-led initiative designed to support compliance with national regulations and international standards. These structured, voluntary programmes are embedded in responsible feed manufacturing, aiming to detect, manage, and mitigate risks before they enter the food chain. From raw materials to finished feed, AFMA's ongoing monitoring efforts provide a comprehensive view of contamination risks across the production chain. Focusing on three key contaminants – Salmonella, dioxins/PCBs, and mycotoxins – these programmes involve systematic sampling and data analysis to support early hazard detection, enhance traceability, and guide targeted interventions.

Salmonella

Since 2005, AFMA's Salmonella Monitoring Programme has analysed over 175,000 samples, providing a robust, risk-based view across raw materials, finished products, and the feed mill environment.

Mycotoxins

Each year, the South African Grain Laboratory (SAGL), with funding from the Maize Trust, conducts a national survey of maize crop quality at farm level. Since 2015, AFMA members have participated in the SAGL Mycotoxin Monitoring Programme, which evaluates mycotoxin contamination in maize after storage and upon delivery to food and feed processing facilities.

Now in its 10th year, the SAGL Maize Mycotoxin Monitoring Programme has analysed over 2,500 samples to date, with

more than 1,200 contributed by the animal feed industry. SAGL reported that mycotoxin levels in post-storage maize during the 2023–2024 processing season showed aflatoxins and DON well below regulatory limits, while fumonisins were commonly detected – with only one sample exceeding the limit for human consumption. For 2024-2025, the first two sampling cycles have been completed, with 121 samples submitted. This ongoing Trust-funded initiative continues to provide valuable insights and supports proactive mycotoxin risk management across the feed supply chain.

Dioxins & PCBs

Polychlorinated biphenyls (PCBs) and dioxins are persistent environmental pollutants that pose significant risks to both animal and human health when they enter the feed and food chain. Although no longer produced and strictly regulated in many countries in many countries, their stability and fat solubility allow them to accumulate in animal tissues, potentially impacting consumers through contaminated animal products.

These contaminants are regulated by Act 36 of 1947, and feed millers must verify compliance with the feed safety requirements. To support industry compliance, AFMA launched its Dioxin and PCB Monitoring Programme in 2011. The programme helps assess the safety of feed ingredients and contributes to a national database for ongoing risk evaluation. From January 2016 to December 2024, more than 2,600 samples were evaluated – around 62% through qualitative PCB

screening (62% on raw materials and 38% on finished products) and 38% via quantitative analysis (13% on raw materials and 87% on finished products). Reassuringly, all samples tested to date – including higher-risk ingredients such as animal by-products, plant-based oils, and certain minerals – have remained within legal safety limits.

Due to the lack of local testing infrastructure, dioxin analyses are conducted by ISO-accredited international laboratories. While current participation remains limited, this programme plays a vital role in monitoring high-risk ingredients, supporting regulatory compliance, and strengthening supplier oversight. AFMA strongly encourages all members to participate, as wider industry involvement will enhance early warning systems, reinforce our collective commitment to feed safety, and ensure continued access to both local and international markets.



Regulatory Committee Matters



Chairperson: Hanaa Solomon
(Allied Nutrition)



Vice-Chairperson: Liza Burger
(Epol)

6.1 Strategic Focus Areas

The **Regulatory Committee** supports AFMA's second and third strategic pillars by promoting a modernised, science-based feed regulatory framework, enabling global trade harmonisation, and driving effective industry self-regulation. In 2024/2025, the following key focus areas were prioritised: Farm Feed Regulation Amendments, Feeds and Pet Food Bill, and Hominy Chop Repeal and Regulation.

Farm Feed Regulation Amendments

The amended farm feed regulations under Act 36 of 1947 have been submitted to the Minister and are currently undergoing final legal and internal review. Once approved, the regulations are expected to be published for public comment. The final version is anticipated to closely align with the December 2024 draft circulated to industry, which incorporated comprehensive feedback from AFMA and PFI early in 2025. Key regulatory updates include revised tolerance limits for undesirable substances, the introduction of veterinary medicine carry-over provisions, updated advertising and labelling requirements, and nutrient specifications aligned with AFMA's Nutrient Guideline Revision Project (NGRP). Nutrient tables are expected to be published separately to allow future updates without requiring full amendment of the regulation.

The revised regulations also now address substances such as carcinogenic, mutagenic, or reprotoxic (CMR) under

terminology such as "substances of concern". While AFMA is not currently aware of any prohibitions, this does not preclude future restrictions. The Registrar has accepted AFMA and PFI's position that such prohibitions cannot be enforced through non-binding guidelines and must follow proper legal channels – ensuring transparency and equal application. Should restrictions, such as on formaldehyde, be introduced, they would require ministerial approval and public notification under Regulation 7 Bis. Members are reminded to remain compliant with the Hazardous Chemical Agents Regulations under the Occupational Health and Safety Act. AFMA remains committed to supporting transparent regulatory decisions and continues to collaborate closely with the Registrar, AIC, and industry partners to facilitate the finalisation process, ensure member preparedness, and maintain alignment with national and international best practices. Further communication will be shared once the regulations are published, or new developments arise.

Hominy Chop regulation

In June 2025, the Department of Agriculture published Notice No. 6284, signalling its intention to regulate all maize milling by-products, including hominy chop, which has remained exempted from registration for over four decades. The process originally began in 2013 when the Registrar issued Notice 1113 proposing a 13% maximum moisture limit. AFMA, supported by the SA Feedlot Association, raised concerns that this limit did not reflect current maize milling practices, where conditioning processes and modern equipment resulted in higher moisture content.

In response, AFMA proposed a dual-category approach in 2021: a standard hominy chop ($\leq 13\%$ moisture) and a high-moisture variant ($\leq 15,5\%$) with an antioxidant, shelf-life labelling, and a "feed within 14 days" warning. When Notice 6284 was published, AFMA requested a 30-day extension to re-evaluate the 2021 proposal considering current practices, updated user feedback, and differing



storage and handling needs between bulk and bagged products. Final comments was submitted to the Department in August. AFMA continues to engage with nutritionists, millers, and feedlot stakeholders to assess whether formal registration is necessary, or if quality and safety can be effectively managed through existing supplier contracts and internal controls.

Feeds and Pet Food Bill

The Feeds and Pet Food Bill continues to be a central focus in modernising South Africa's feed legislation for animal feed and pet food. The bill aims to protect animal and public health, reduce unnecessary regulatory burdens, enable innovation, and align with global standards while enhancing competitiveness and supporting economic growth.

A dedicated task team of primary stakeholders (comprising representatives from AFMA, PFI, and the Registrar's office under Act 36) was established to guide the bill's development. This team collaborated to develop science-based, practical principles for a new legislative framework that encompass all feed consumed by food-producing animals to ensure consumer safety across South Africa.

The Registrar is now initiating consultations with secondary stakeholders in feed manufacturing (livestock producers) to gather inputs and support for the new legislation. Of particular concern is the Registrar's proposal to continue exemption of on-farm feed mixes from regulatory oversight, contradicting prior agreements with primary stakeholders that all feed inputs should be

regulated. AFMA has formally objected, reaffirming that animal welfare, feed safety, and public health are non-negotiable, and that all feed for food-producing animals across South Africa must fall under appropriate regulatory control.

AFMA continues to advocate for a practical, risk-based regulatory model that prioritises facility licensing over product registration and recognises industry self-regulation initiatives such as the AFMA Code of Conduct, Pork 360 and Q-Sure. Ongoing engagement with regulators and producer groups remains key to ensuring the bill reflects industry realities.

6.2 Industry Self-Regulation

AFMA remains committed to upholding high industry standards through robust self-regulation. These efforts focused on three core initiatives: AFMA Code of Conduct (CoC), AFMA Transport Protocol, and AFMA Early Warning System (EWS). These initiatives safeguard the safety, quality, and integrity of animal feed in South Africa, fostering trust and accountability across the sector. AFMA continues to collaborate with the Agricultural Inputs Control (AIC) division on feed compliance matters. However, challenges in 2024 – 2025 have highlighted the critical need for strong self-regulation, as inspection coverage under Act 36 remains limited. When the Inspection Compliance Forum (ICF) reconvened in 2025, it revealed that only 17 feed and 7 ingredient sites were inspected nationally, exposing broader issues including inadequate capacity, lack of risk-based planning, and poor

complaint handling. These gaps reinforce AFMA's belief in the value of internal controls and voluntary compliance. AFMA remains committed to strengthening self-regulatory frameworks and engaging with stakeholders via SAIF to help address inspection shortcomings and ensure a reliable, safe feed supply chain.



AFMA Code of Conduct

The AFMA Code of Conduct remains a cornerstone of voluntary self-regulation within the animal feed industry. Now in Phase 3 of its modernisation, the current focus includes benchmarking the 2021 version, finalising a tiered audit framework, initiating pilot audits, and exploring options to expand audit capacity through the potential appointment of additional assessment bodies. Earlier in 2025, a formal benchmarking study was concluded to assess the Code's alignment with both local and international feed safety standards. As part of this process, AFMA also evaluated which certification and assessment bodies are most used by members to help guide future engagement opportunities. This work forms part of AFMA's broader commitment to maintaining a compliance framework that is practical, scalable, and responsive to evolving industry and regulatory needs. Guided by the benchmarking results, member feedback, and recent regulatory developments, the audit framework and check sheets are being refined to ensure

continued relevance and applicability. A phased implementation will introduce the revised tools, starting with pilot audits conducted by the current assessment body. This approach allows for early validation, identification of any challenges, and consistent application across the membership. AFMA is also currently exploring options for expanding audit capacity to enhance coverage and offer members greater flexibility. These ongoing efforts are integral to strengthening self-regulation, reinforcing compliance standards, and proactively aligning with future legislative changes across the feed sector.

AFMA Transport Protocol

As part of AFMA's broader self-regulation framework – anchored by the AFMA Code of Conduct – the AFMA Transport Protocol was developed collaboratively by the Trade and Technical Committees to promote the safe transport of raw materials and feed ingredients in the animal feed industry. Introduced in 2017, the protocol serves as an additional risk management tool, adapted from GMP standards, and provides practical, risk-based guidelines and cleaning regimes to ensure hygienic, safe delivery of feed materials to manufacturing facilities.

As of 2024/2025, ten transporters have been validated and listed on the AFMA website, earning the right to display the AFMA logo as a mark of their commitment to responsible transport practices and reinforcing trust in the feed supply chain.

AFMA Early Warning System (EWS)

AFMA's Early Warning System (EWS), introduced in 2009, continues to serve



as a proactive safeguard against contamination risks in the animal feed sector. Designed to detect and respond rapidly to hazards such as melamine and heavy metals, the system plays a vital role in protecting feed safety, supply chain integrity, and consumer trust. While the EWS has not been officially activated since its inception, its value as a proactive safeguard remains high.

Over the past year, AFMA has stepped

up efforts to raise awareness among members, encouraging improved supplier oversight and timely reporting of irregularities. A notable incident was discussed during AFMA committee meetings in August 2024, involving concerns over the quality of imported Gluten 60, particularly from China. Although initial microscopic testing indicated the product was pure, subsequent analysis upon arrival in South Africa revealed adulteration with

substances such as gluten, ammonium sulphate, maize, maize bran, and approximately 5% unidentified material. While no harmful contaminants were detected, the affected batches were isolated and redirected for controlled use to prevent entry into the market. Although the Early Warning System (EWS) was not triggered, the incident underscored the need for heightened vigilance, robust supplier verification, and expanded testing protocols.

Members were advised to treat variations in Near-Infrared (NIR) analysis as early indicators of potential quality issues and to take proactive steps to ensure feed integrity.

AFMA continues to promote awareness of the EWS as a key self-regulation mechanism and encourages confidential reporting of irregularities to strengthen risk response.



AFMA's Early Warning System (EWS), introduced in 2009, continues to serve as a proactive safeguard against contamination risks in the animal feed sector.

Training and Skills Development Committee Matters



Chairperson: Ms Petru Fourie



Secretary: Ms Wimpie Groenewald

7.1 Strategic Focus Areas

- Feed Mill Operator Blended Learning Program
- Student Opportunities and outreach
- AFMA/Tertiary Engagement
- Training

Feed Mill Operator Blended Learning Program



The Feed Mill Operator (FMO) Blended Learning Programme has been identified as a critical and strategic intervention for the feed manufacturing sector. It is designed to equip feed mill operators with both the theoretical knowledge and practical skills necessary to perform effectively in a modern feed milling environment. The programme exposes learners to essential knowledge areas

and operational practices related to the production of mixed livestock feeds. It prepares participants to operate confidently and competently at an operator level within a feed mill.

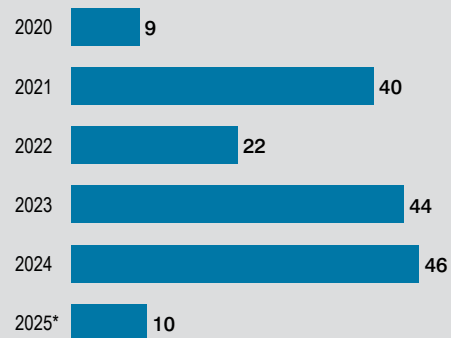
A key strength of the FMO programme is its blended learning approach, which transforms the workplace into an active training environment. This enables skills development to take place with minimal disruption to mill productivity, integrating learning seamlessly into day-to-day operations. By combining structured theoretical content with hands-on, work-based experience, the programme ensures learners gain practical competence in real-world settings, meeting the sector's demand for skilled, knowledgeable operators.

The committee is tasked with the promotion of the FMO program in the



industry. The Program continues to grow steadily, with a cumulative total of 171 learner registrations since its inception in 2020. Notably, the program saw a strong intake in 2024, and as of July 2025, ten additional learners are actively progressing through the course. The uptake of learners can be seen in the **figure 5** on the next page:

Figure 5: Total FMO Blended Learning Program Registrations



* 2025 data is till July 2025

Feed Mill Operator (NQF4) part qualification

The committee was mandated to evaluate whether there is a need to upscale the Feed Mill Operator (FMO) Blended Learning Program from an industry-endorsed initiative to a formal qualification. To inform this decision, a survey was conducted among a representative group of complete feed manufacturers. The results indicated strong support for maintaining the FMO Program in its current endorsed format. Reasons cited by members included:

- The flexibility of the current program allows companies to train operators with minimal disruption to production.
- The cost implications of formal accreditation would likely make the program more expensive or unattractive to some members, especially smaller operators.
- Accreditation would introduce additional administrative and compliance burdens, including the need for more formal assessments and record-keeping requirements.
- The current AFMA endorsement is already widely respected within the industry and provides sufficient credibility for company training and development needs.
- There is concern that simply accrediting the existing program without significantly expanding its scope would not provide sufficient additional value to justify the investment.

The committee therefore agreed that, for the time being, AFMA's focus should remain on strengthening and promoting the current blended learning model. The program, already widely respected in the industry, continues to meet members' training and development needs effectively.



The 2025 Student Outreach event was hosted at the Meadow Feeds Pietermaritzburg Plant, in collaboration with the University of Zululand.



Student opportunities and outreach

Student Outreach

AFMA is committed to hosting at least one student outreach seminar annually, rotating among various universities to ensure broad engagement. The primary objective of this initiative is to create meaningful interaction between aspiring students and experienced professionals, with AFMA members acting as ambassadors of the animal feed industry.



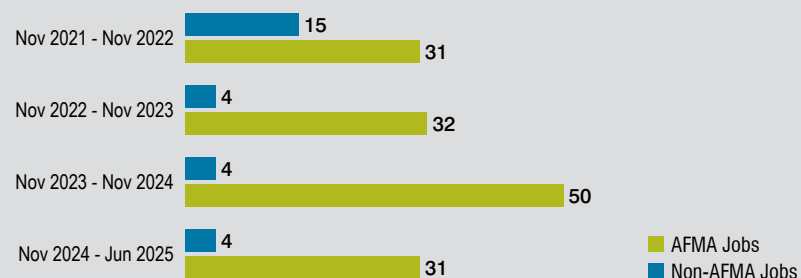
The 2025 Student Outreach event was hosted at the **Meadow Feeds Pietermaritzburg Plant**, in collaboration with the **University of Zululand**. The seminar welcomed a group of 65 Animal Science students and featured a dynamic programme designed to provide both educational and practical insights into the feed manufacturing sector. The day included informative presentations by Meadow Feeds personnel, covering topics such as raw materials and feed safety, technical and production management, and technical advisory services. Additionally, students received career guidance, including CV and interview tips, as well as an introduction to SACNASP CPD professional registration.

As always, the highlight of the day was the guided tour through the feed mill, offering students invaluable firsthand exposure to the operational environment and processes of a working mill. This outreach initiative successfully bridges the gap between academic learning and industry practice, inspiring the next generation of professionals in the feed manufacturing sector.

Career opportunities

The AFMA Training and Skills Development Committee is responsible for identifying and compiling career opportunities within the animal feed sector. These opportunities are hosted on the Agrijob web-based platform with the aim of attracting student interest and promoting employment within the industry. The following figure provides an overview of the vacancies listed on the Agrijob platform:

Figure 7: Total number of job advertisements for animal feed industry per category



Source: Agrijob (2025)

AFMA's collaboration with Agrijob continues to provide valuable visibility for career opportunities in the feed sector, with a total of 149 AFMA-related job listings posted between November 2021 and June 2025. Notably, AFMA consistently contributed most animal industry vacancies listed, underscoring the sector's role in driving employment within the broader agricultural landscape.

The types of job ads posted on the Agrijob platform for the Animal Feed Industry, can be categorised as follows:

Job Categories

Feed Milling Operations, Feedlot/Broiler Operations

- Operations & Feed Mill Management
- Logistics
- Millwright
- SHEQ
- QA/QC
- Raw Materials Controller
- Feedlot/Farm/Broiler Management

Commercial

- Technical Sales
- Marketing
- Key Account Management
- Product Manager
- CEO/GM
- Financial Management/Admin

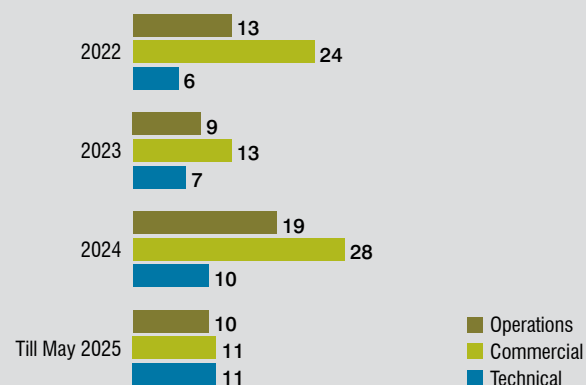
Technical

- Nutritionist
- Technical Service
- Technical Support – not sales





Figure 7: Total number of job advertisements for animal feed industry per category



Source: Agrijob (2025)

AFMA-Tertiary engagement

In April 2025, AFMA hosted a dedicated engagement session with representatives from nine tertiary institutions offering Animal Science programs. The meeting created a valuable platform to discuss how universities and the feed industry can work more closely together, particularly in aligning academic focus areas with practical industry needs. It was clear that there is strong willingness across institutions to deepen collaboration. The committee identified a clear need to foster stronger collaboration between the animal feed industry and tertiary institutions.

This engagement created a shared platform co-developed by universities and industry stakeholders, a space designed to encourage open dialogue, mutual learning, and joint progress. It was acknowledged that each institution brings unique strengths and faces different challenges. The focus, therefore, was on building a deeper understanding of how we can support one another to drive collective success.

Key objectives of the platform include:

- Strengthening locally relevant research.
- Identifying and advancing areas of mutual benefit between academia and industry.
- Expanding access to professional networks, mentorship, and career opportunities; and
- Laying the foundation for long-term, sustainable partnerships.

Investment in human capital is not optional; it is a strategic imperative. Skills development must be prioritised to ensure the continued growth and resilience of the feed manufacturing sector.

As a next step, AFMA is compiling an inventory of each of the institutions. This data will help us better understand the landscape of animal science training in South Africa and identify areas where more structured collaboration can add value. Whether it's highlighting key subject strengths or mapping out how institutions approach feed-related modules, the aim is to create a clearer picture of where academia and industry can connect more meaningfully.

7.2 Other training & skills development matters

Act 36 of 1947 in practice workshop

Navigating the complexities of Act 36 of 1947 is essential for ensuring regulatory compliance and upholding best practices within the agricultural inputs sector. In response to the growing need for clarity and practical interpretation of the Act, AFMA hosted a specialised workshop on 4–5 October 2024.

The workshop was presented by Mr Herman van Zyl, a highly respected expert with over 44 years of experience in interpreting and applying this critical legislation. Interest in the workshop was exceptional, with all 22 seats in the AFMA Boardroom booked within hours of the announcement. Feedback from participants was overwhelmingly positive, highlighting the value and relevance of the content delivered during the intensive two-day session. Due to high demand, a waiting list was quickly established for those unable to attend.



Considering its success, AFMA will host this workshop annually, with the next session scheduled for 2–3 October 2025. For more information or to register your interest, please contact Wimpie Groenewald at admin@afma.co.za.

AFMA Feed Miller Short Course

The AFMA Feed Miller Short Course took place from 31 March to 11 April 2025, presented by the esteemed Mr Ernst Nef. A total of **55 delegates**, representing **22 companies**, seized the opportunity to attend what marked the final session facilitated by Mr Nef. Given the continued demand and value of this specialised training, the next AFMA Feed Miller Short Course is scheduled to resume in 2027 and will be presented on a bi-annual basis.



AFMA Feed Miller Short Course





7.3 AFMA Awards

The following AFMA Awards were awarded in 2024:

AFMA Intersivity Writer's Cup (IWC)

Launched in 2017, the Intersivity Writer's 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 own research winner, **Migheal van Schalkwyk** from **Stellenbosch University**, for his outstanding contribution. In addition, we congratulate Stellenbosch University for winning the Intersivity Writer's Cup competition for a second consecutive year. The overall winner for the literature review category was **Jamie Fourie** from the **University of Pretoria**.



and recognise exceptional graduate or postgraduate students in animal nutrition, continuing Dr. van der Merwe's legacy.

On 4 September 2024, **Jamie Fourie** from the **University of Pretoria** was announced as the 2024 recipient. Previous award winners can be viewed on the AFMA website. For the first time in the history of the AFMA Koos van der Merwe / AFMA Student of the Year Award, the competition was so intense that two deserving runners-up were also formally recognised. The two deserving runners-up were **Millicent Mokonyama** from **Northwest University** and **Anri Pienaar** from the **University of Pretoria**.

AFMA Student Research EXPO Award 2024

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!



AFMA Person of the Year

The AFMA Person of the Year award celebrates an individual who has made outstanding contributions to the animal feed or feed-related industry within the past two years. Presented annually, this esteemed award recognises the recipient's influence and achievements within the sector. It also provides a platform for the winner to engage with peers, share valuable insights, and help drive industry advancement.

On 4 September 2024, **Wandile Sihlobo** of **Agbiz** was named the 2024 recipient in recognition of his significant impact on the South African feed industry.

AFMA PERSON OF THE YEAR AWARD 2023/24

Awarded to

Wandile Sihlobo
Agbiz

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



AFMA Student of the Year

The AFMA Student of the Year award honours Dr. Koos van der Merwe for his pioneering contributions to the South African animal feed industry. Dr. van der Merwe's scientific approach and efforts in the 1940s and 1950s helped elevate the industry, integrating it into the broader animal production sector. This award aims to inspire



BARNEY VAN NIEKERK / AFMA TECHNICAL PERSON OF THE YEAR AWARD 2024

Awarded to

Dr Vlok Ferreira
RCL Foods – Molatek

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



AFMA Technical Person of the Year

Dr Barney van Niekerk's legacy continues to shape the animal feed industry through his pioneering research in animal nutrition and innovative feed formulation. As a respected educator and mentor, he played a key role in advancing animal health and the broader industry. In tribute to his lasting impact, the AFMA Technical Person of the Year award is presented annually to an animal scientist who

demonstrates outstanding commitment and contribution to the field of animal nutrition.

On 4 September 2024, **Dr Vlok Ferreira** of **RCL Foods – Molatek** was named the 2024 recipient, in recognition of his significant contributions to animal nutrition in South Africa.

LIFETIME ACHIEVEMENT AWARD

Presented to

Christiaan Ernst Schutte

In recognition of a career defined by visionary leadership, exceptional contributions, and unwavering dedication to the South African animal feed and poultry industry. Your innovative spirit and relentless pursuit of excellence have set new standards, shaping the future of our industry.

This award celebrates your profound impact, not only within your organisation but across the entire sector, leaving a legacy that will inspire generations to come.



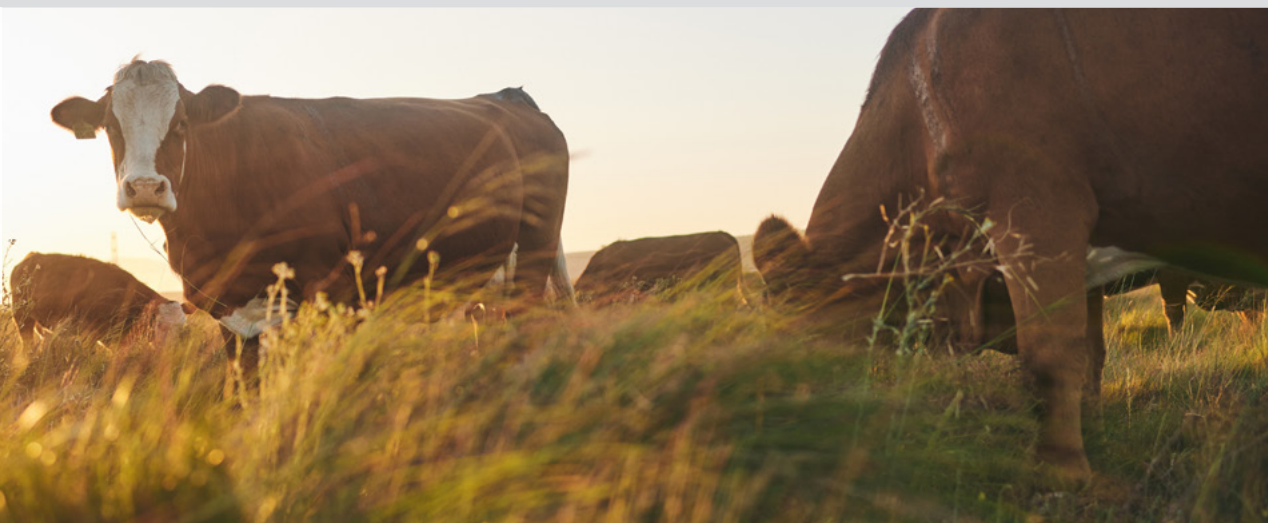
Lifetime Achievement Award

The AFMA Lifetime Achievement Award was presented for the first time in 2024, marking a historic milestone for the association. In honour of a career distinguished by visionary leadership, outstanding contributions, and steadfast

commitment to the South African animal feed and poultry industries, **Mr Chris Schutte** of **Astral Foods** received the prestigious award at the AFMA AGM held on 4 September 2024.

Dr Vlok Ferreira of RCL Foods – Molatek was named the AFMA Technical Person of the Year 2024 in recognition of his significant contributions to animal nutrition in South Africa.

Mr Chris Schutte of Astral Foods received the AFMA Lifetime Achievement Award, which was presented for the first time in 2024.





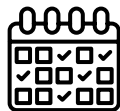
Marketing and Promotion Committee Matters



Chairperson: Ms Petru Fourie



Secretary: Ms Benita Oelofsen



8.1 Events

Date: **4 September 2024**
Event: **AGM**
Venue: **Cathedral Peak Hotel**
Where: **KZN**

Attending 48

Date: **31 October 2024**
Event: **Symposium**
Venue: **CSIR ICC**
Where: **Pretoria**

Attending 422

Date: **6 May 2025**
Event: **Media & Industry Day**
Venue: **Grain SA Auditorium**
Where: **Pretoria**

Attending 51

Date: **4 September 2025**
Event: **Golf Day**
Venue: **Zimbali Country Club**
Where: **KZN**

Attending 120 Players
from 30 sponsor companies



8.1.1 AFMA Annual and General events

AFMA Annual General Meeting: Award Ceremony



AFMA Person of the Year



AFMA Technical Person of the Year



Lifetime Achievement Award



AFMA Annual General Meeting: Meet & Greet



AFMA Annual General Meeting: Meeting with guest speakers



Industry Media Day



AFMA Golf Day





AFMA Symposium



8.2 Digital Communications

8.2.1 AFMA website and microsites

Over the years, AFMA's digital infrastructure, particularly its website has played a foundational role in the dissemination of regulatory updates, industry news, feed production statistics, event information, and member resources. However, as member needs evolved and digital expectations advanced, the limitations of the old AFMA website became increasingly apparent. The outdated user interface, slow performance and lack of integration with internal member systems significantly hindered efficient communication and engagement with our members and external stakeholders.

Recognising these challenges, AFMA initiated a comprehensive digital modernisation project at the start of 2025, which consists of **two key pillars**:

- ➔ The AFMA website upgrade
- ➔ The development of an integrated Web-Integrated Member Management System (WIMMS)

AFMA website upgrade

The upgraded AFMA website is scheduled to launch at the end of August 2025. It will feature a modern design, user-friendly layout, and full mobile compatibility, making it simpler for members, students, regulators, and the industry to access

information quickly and efficiently.

This upgraded platform also forms the base for the next step in AFMA's digital transformation with the development of WIMMS.

Web-Integrated Member Management System (WIMMS)

Alongside the website upgrade, the WIMMS project kicked off in early 2025 as a longer-term initiative. This system is being developed to bring together and simplify many of AFMA's existing internal processes into one easy-to-use platform. The WIMMS project is not only about upgrading systems but also about creating value for AFMA members. Once implemented, it will make it much easier for members to access resources and manage their information through a single, user-friendly platform. For AFMA, it will save time by reducing manual work and streamlining internal workflows, allowing the team to focus more on delivering value to members. The project is progressing well and is expected to be completed and rolled out in the first quarter of 2026.

Microsites

- AFMA AGM: www.afmaagm.co.za
- AFMA Symposium: www.afmasymposium.co.za
- AFMA Forum: www.afmaforum.co.za
- AFMA Technical Writing Skills Workshop: www.afmatechnicalwritingskillsworkshop.co.za
- AFMA Golf Day: www.afmagolfday.co.za



8.2.2 Member Update



8.2.3 Social media

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


6 430
Followers


3 039
Followers


16 882
Followers

* Followers as of 31 August 2025

8.3 Print media

8.3.1 AFMA Matrix



The **AFMA Matrix**, AFMA's flagship industry publication, continues to serve as a vital communication and knowledge-sharing platform for the South African animal feed sector. Published quarterly and distributed both electronically and in print, the Matrix reaches a broad audience including AFMA members, regulatory bodies, academic institutions, and industry partners.

Over the past year, AFMA has placed deliberate emphasis on strengthening the magazine's role in communicating internal projects, committee work, and strategic initiatives. Significant effort was invested in well-crafted internal articles that provide members with deeper insight into AFMA's ongoing activities, ranging from regulatory engagement and training programmes to trade developments, technical projects, and stakeholder collaboration. This focus has not only enhanced transparency but also reinforced the value of membership by showcasing AFMA's operational scope and progress across all key portfolios.

If you'd like to receive the AFMA Matrix in PDF format via WhatsApp, simply message 064 890 6941 with the reference "AFMA Matrix 2025". To have it sent to your email inbox, contact Beauty Mthombeni at beauty@plaasmedia.co.za.



AFMA Membership

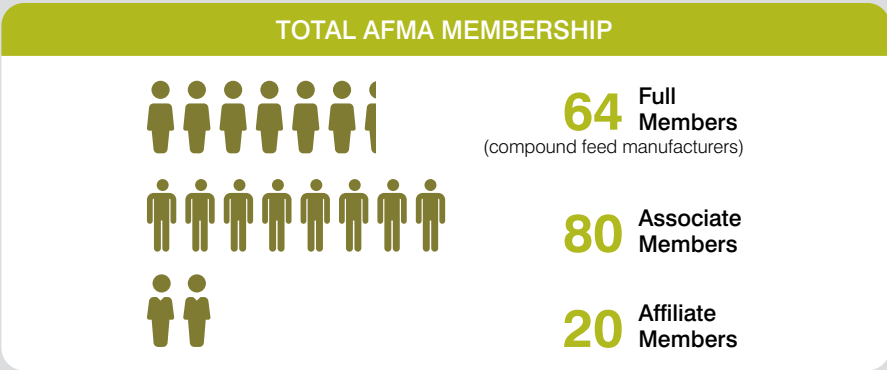
9.1 AFMA Membership summary

During the reporting period, AFMA received a total of 27 new membership applications, broken down as follows:

- 8 applications for potential Full Membership
- 12 applications for potential Associate Membership
- 7 applications for Affiliate Membership

In the same period, one Affiliate and one Associate Member resigned from AFMA.

As of the 2024/25 financial year, AFMA's total membership stands at 164, comprising:





9.2 New members

The following companies have successfully applied for AFMA membership, met the compliance requirements of the AFMA Code of Conduct (where applicable), and have been awarded official AFMA Membership Certificates:

Full Member

Thuso Voere



Associate Members

Agrisa Commodities



Southern Oil
Moorreesburg



Grainvest Physicals



Dynamic Feeds



Comdi Agricultural
Markets



Pretoria Protein
Company



Affiliate Members

Fincham Trading



9.3 Membership Renewals

The status of AFMA Full and Associate Membership renewals for the period is as follows:

- 47 renewal applications were received
- 30 members were confirmed compliant
- 17 renewal applications are currently being processed

The AFMA Full, Associate and Affiliate Membership lists, along with the Code of Conduct compliance status of Full and Associate Members, are available on the AFMA website.

Additionally, ten (10) transport companies participated in the AFMA Transport Protocol Audit during the reporting period. The list of approved transporters can be accessed on the AFMA website.

AFMA extends its sincere appreciation to all members for their continued support and commitment to the safe and responsible manufacture of animal feed – contributing to our vision of **Safe Feed for Safe Food**.





AFMA Organisational Structure

10.1 Board of Directors

AFMA is led by a collective of dedicated individuals that is committed to guiding our industry organization toward a successful future. With their wealth of experience and strategic vision, they provide essential direction and guidance, shaping AFMA initiatives and policies that drive our industry forward.

The elected Directors of the Board for 2024-2025 are:



Mrs Anina Hunter
Epol
Chairperson



Mr Michael Schmitz
Meadow Feeds
Vice-chairperson



Mr Brett Roosendaal
Epol



Mr Dieter Fleischmann
AFGRI Animal Feeds



Mr Francois du Toit
Quantum Foods



Dr Franscois Crots
Country Bird Holdings



Dr Josef Van Wyngaard
Voermol



Mr Paul Saunders
Sovereign Foods



Mr Ruan Stander
Meadow Feeds



Mrs Sharlene Moodley
De Heus Animal Feeds



Mr Thinus Van Lill
Quantum Foods



Mrs Liesl Breytenbach
Executive Director, AFMA



One Director, Mrs Liesl Breytenbach, is appointed by the Board to implement the strategic goals and ensuring the organization meets its mission and objectives.



10.2 AFMA Committees

A set of five Committees form the structural backbone of AFMA through which all members have a voice and can ensure that topics of interest are addressed towards the betterment of the industry as a whole. Each committee is led by a Chairperson and Vice-Chairperson, nominated and elected by members, and form an integral part of the management of AFMA strategic projects. The committees comprise a number of specialized working groups or sub-committees, each tasked with specific projects that contribute towards the overall strategic objective of AFMA.

Trade Committee

- Chairperson: **Mr Ruan Stander** (Meadow Feeds)
- Vice-Chairperson: **Mr Paul Saunders** (Sovereign Foods)
- Administrator: **Dr Lucius Phaleng**

Technical Committee

- Chairperson: **Ms Gay Boomgaard** (Meadow Feeds)
- Vice-Chairperson: **Ms Janke Bestbier** (Alltech Biotechnology)
- Administrator: **Ms Bonita Cilliers**

Regulatory Committee

- Chairperson: **Ms Hanaa Solomon** (Allied Nutrition)
- Vice-Chairperson: **Ms Liza Burger** (Epol)
- Administrator: **Ms Bonita Cilliers**

Training & Skills Dev Committee

Chairperson: **Ms Petru Fourie**
Administrator: **Ms Wimpie Groenewald**

Marketing & Promotion Committee

Chairperson: **Ms Petru Fourie**
Administrator: **Ms Benita (Bee) Oelofsen**

10.3 Meet our Team

To ensure effective organisational outputs, each committee has an administrator from the AFMA office that manages inter- and intra-committee communication and is essential for operational excellence. In addition to committee administration, the AFMA personnel are managing various portfolios and are the critical link between members and industry stakeholders to ensure that AFMA remains on the forefront of being a thought leader in animal feed and provides value-added service to its members.

The team consists of:



Liesl Breytenbach
Executive Director



Petru Fourie
Operations Manager



Dr Lucius Phaleng
Trade Advisor



Bonita Cilliers
Technical &
Regulatory Advisor



Wimpie Groenewald
Membership liaison



Benita (Bee) Oelofsen
Events & marketing
coordinator



**Mandy Jansen
van Vuuren**
Finance



Olivia Botha
Office Administrator



Cilé-Mari Schultz
Technical intern

A technical internship was offered during this period to provide hands-on work experience to animal science graduates, with Cilé-Mari Schultz taking over from AFMA's first intern Elri du Toit.



Acknowledgments

Firstly, I want to acknowledge the AFMA Board of Directors for their support and guidance throughout the year and their commitment to serving the industry and encouraging AFMA to be a leader in the agricultural sector.

The AFMA Committees management teams have worked tirelessly towards achieving their respective strategic goals and are instrumental in ensuring collective input that drives progress.

To all AFMA member companies that support the AFMA initiatives through their loyal participation in AFMA Committees and events – without your expert inputs and support we cannot be effective as a representative body.

Professionals serving on the various AFMA panels of judges that evaluates technical articles for the Intervarsity Writer's Cup and the student Nutrition poster award are key in shaping animal nutrition research in South Africa and is highly valued.

Service providers in training, compliance audits, recruitment, IT and graphic design forms an important part of the service delivery promise from AFMA and their professional contribution is appreciated.

Lastly, I 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.





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