

CHAIRMAN'S REPORT 2025/26

Presented by Anina Hunter at
AFMA's 79th AGM hosted at
Sun City, on 8 September 2026

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Letter from the Chairperson

The Feed Factor: Strengthening the Chain That Feeds a Nation

Anina Hunter – AFMA Chairperson

Following AFMA's 80th anniversary in 2025, our attention has shifted from celebrating the Association's proud history to preparing the animal feed industry for its next chapter.

That future presents both considerable challenges and significant opportunities. Animal disease, infrastructure constraints, regulatory change, volatile commodity markets and an increasingly uncertain climate continue to test the resilience of our sector. At the same time, innovation, stronger industry collaboration and growing demand for affordable animal protein create important opportunities to strengthen South Africa's food system.

The theme of this year's AFMA Forum, ***The Feed Factor – The Chain That Feeds a Nation***, captures an essential truth: feed is not simply an input into animal production. It connects crop producers, processors, feed manufacturers, livestock farmers and consumers, influencing the affordability, safety and sustainability of food throughout the value chain.

An Industry Showing Resilience

AFMA member feed production increased by 2.7% to approximately 7.21 million tons during the 2025/26 period, supported principally by growth in poultry feed.

However, this overall improvement should not obscure the different pressures facing individual sectors.

While some livestock industries benefited from more favourable conditions, others, including beef and sheep, experienced declining feed demand.

These contrasting trends reinforce the importance of viewing the feed industry as part of a broader agricultural system. Our performance depends not only on conditions within feed manufacturing, but also on the health and competitiveness of the livestock, grain and oilseed industries we serve.

Improved grain and oilseed availability has offered welcome relief to parts of the value chain. However, favourable raw-material conditions do not eliminate structural risks. Climate variability, geopolitical tensions, currency movements, freight disruptions and infrastructure constraints can quickly change the economics of feed production and animal agriculture.

Feed Security is Food Security

South Africa needs reliable access to safe, nutritious and affordable animal protein. Feed plays a direct role in achieving this through its influence on production efficiency, animal health, food safety and the cost of meat, milk and eggs.

These responsibilities extend across the entire agricultural value chain. Lower grain and oilseed prices may support feed affordability and livestock profitability, but they can also place crop producers under pressure when their own production costs remain high.

Long-term food security therefore depends on sustainable, competitive businesses at every stage of production. Our objective cannot be the success of one part of the chain at the expense of another; it must be a stronger, more resilient system that supports producers and consumers alike.

Protecting Animal Health and Biosecurity

Animal disease remains one of the most significant threats to South Africa's livestock industries and national food security.

Foot-and-mouth disease has highlighted the consequences of outbreaks for livestock movement, producer confidence, trade and agricultural investment. Highly pathogenic avian influenza and African swine fever also remain important risks, capable of disrupting production and placing substantial pressure on the wider value chain.

Effective disease management requires coordinated action between government and industry, supported by surveillance, appropriate vaccination where available, responsible movement controls and practical biosecurity measures.

Feed manufacturers have an important role to play through feed hygiene, traceability, raw-material controls, responsible transport practices and sound biosecurity within manufacturing facilities.

Animal health is not the responsibility of one producer, one sector or one department. It is a shared priority that demands a coordinated response.

Modernising Regulation and Industry Assurance

The past year has brought important developments in South Africa's feed regulatory environment.

Following the publication of updated regulations under Act 36 in January 2026, AFMA submitted consolidated industry comments to support a practical and effective regulatory framework. Progress has also been made towards agreement on the principles of a new Feeds and Pet Food Bill, creating an opportunity to modernise feed legislation in South Africa.

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An effective regulatory framework must protect feed and food safety while remaining practical, proportionate and responsive to scientific and technological progress. Efficient registration processes and reliable administrative systems are equally important if South Africa is to encourage innovation and investment.

AFMA has also continued work to modernise its Code of Conduct through a more preventive, risk-based approach. This includes strengthening traceability, improving audit consistency and preparing for electronic audit management.

These initiatives are about more than compliance. They help build confidence in the integrity, safety and professionalism of our industry.

Innovation, Sustainability and Future Skills

The future competitiveness of feed manufacturing will increasingly depend on how effectively we combine technical expertise with new technologies.

Artificial intelligence, automation, real-time quality monitoring, predictive maintenance and improved formulation tools can support faster and more informed decision-making. On farm, precision nutrition and improved performance monitoring can help strengthen animal health, feed conversion and resource efficiency.

Technology will not replace industry knowledge. It will enable us to apply that knowledge with greater speed, precision and consistency across the feed-to-food chain.

Sustainability must be equally practical. It means using raw materials, energy and water more efficiently; reducing waste; supporting responsible sourcing; improving logistics; and contributing to climate-resilient food systems.

These priorities also reinforce the need to develop future skills. Nutritionists, engineers, millers, quality specialists, data analysts and emerging industry leaders will all be essential to building a sector that remains competitive and prepared for change.

A Regional Opportunity Built on Collaboration

South Africa's feed industry has the technical knowledge, manufacturing capability and industry systems to contribute more broadly to the development of African livestock production and regional food security.

Realising this potential will depend on addressing transport and infrastructure challenges, improving market access and creating conditions that support trade and agricultural investment.

Above all, it will require collaboration.

Feed manufacturers, grain producers, oilseed processors, livestock farmers, veterinarians, researchers, regulators, financiers and retailers each have a role to play. No single part of the value chain can solve the challenges of affordability, animal health, competitiveness and food security on its own.

AFMA's strength lies in bringing these voices together and providing a credible platform for constructive engagement, evidence-based policy and collective action.

As we look ahead, our responsibility is not only to respond to change, but to help shape an industry that is safe, competitive, innovative and sustainable.

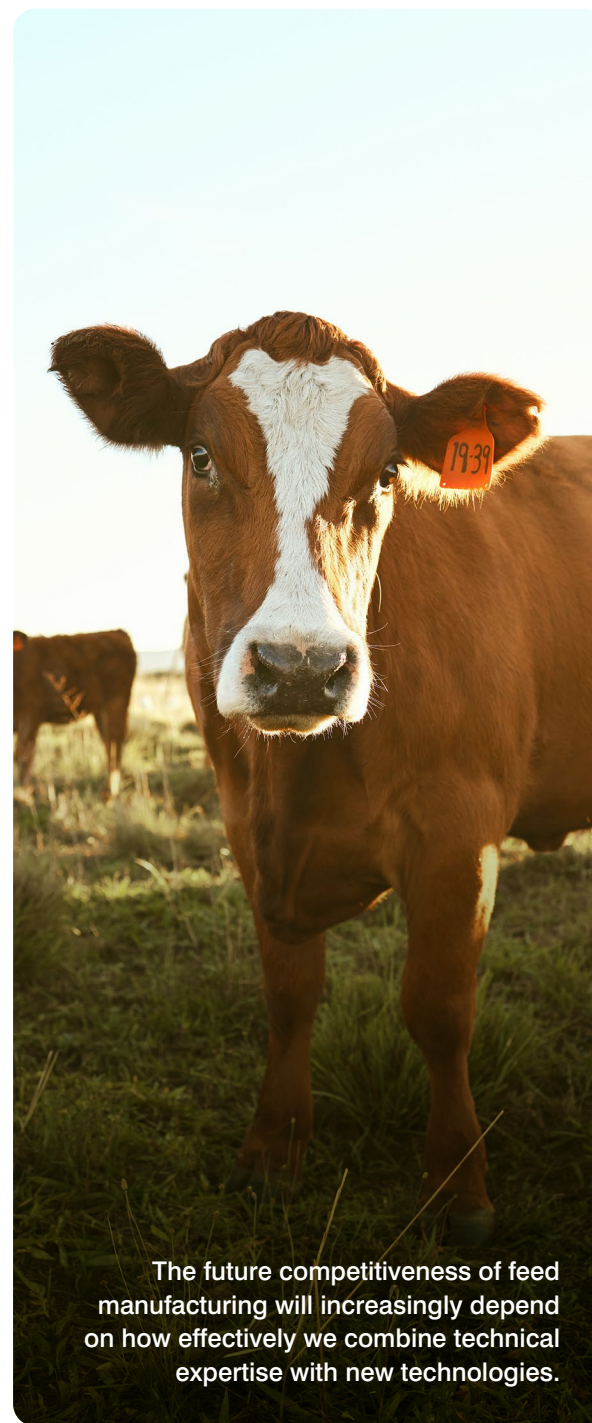
I thank our members for the expertise, commitment and collective voice that continue to give AFMA its strength. My appreciation also goes to the Board, committee leaders, government and industry partners, and the AFMA team for their continued dedication to the sector.

Together, we can strengthen the chain that feeds our nation and ensure that South Africa's animal feed industry remains a trusted foundation of food security for years to come.

Warm regards,

Anina Hunter

*Chairperson
Animal Feed Manufacturers
Association of South Africa (AFMA)*



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1. Introduction

1.1 Organisational Mission and Vision

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:

- **Providing** management information to members, industry and other role players.
- **Influencing** and **managing** factors that have a bearing on industry costs.
- **Lobbying, liaising** and **cooperating** with industry role players.
- **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

During the 2025/26 reporting period (April 2025 to March 2026), AFMA members produced 7.21 million tons of feed, an **increase of 2.7%** from 7.01 million tons in 2024/25.

Performance varied across the major feed categories. Within poultry, **broiler feed** remained the largest category at 3.23 million tons and **increased by 4.7%**, while **breeder feed increased by 4.9%**. **Layer feed** recorded the strongest growth among the major categories, **increasing by 12.8%**.

The ruminant categories showed a different picture. **Beef and sheep feed declined by 8.6%**, while **dairy feed** remained broadly stable, **declining by just 0.1%**. **Pig feed** was also relatively stable, **decreasing by 0.7%**. Among the smaller categories, **ostrich feed increased by 18.6%**, **dog food by 9.1%**, **rabbit feed by 4.1%** and **aquaculture feed by 1.3%**, while **game feed declined by 15.0%**.



Overall, AFMA feed production recorded moderate growth during 2025/26, supported mainly by growth in the poultry feed categories, while beef and sheep feed remained under pressure.

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 Soya Value Chain, JSE Commodity Advisory Committees, Agricultural Trade Forums, the Grain and Oilseeds Value Chain

7.21 million tons
total feed production

2024/25: 7.01 million tons

↑ **4.7%**
Broiler Feed

↑ **4.9%**
Breeder Feed

↑ **12.8%**
Layer Feed

↓ **8.6%**
Beef and Sheep Feed

↓ **0.1%**
Dairy Feed

↓ **0.7%**
Pig Feed

↑ **18.6%**
Ostrich Feed

↑ **9.1%**
Dog Feed

↑ **4.1%**
Rabbit Feed

↑ **1.3%**
Aquaculture Feed

↓ **15.0%**
Game Feed

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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. During the 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 limit sector growth and the availability 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 Agroprocessing Master Plan (AAMP) and the Poultry Master Plan (PMP) continues to reaffirm AFMA's commitment to public-private partnerships aimed at securing food systems, enhancing competitiveness, and supporting inclusive economic growth.

These partnerships reinforce AFMA's belief that collaboration remains fundamental to the resilience, competitiveness and future development of South Africa's animal feed industry.

1.4 Looking Ahead

Looking ahead, AFMA will continue to strengthen its leadership role in advancing industry assurance, recognising that robust self-regulation is fundamental to maintaining the credibility, competitiveness, and sustainability of South Africa's animal feed industry.

The Association will prioritise the implementation of a modernised Code of Conduct that incorporates risk-based oversight, digital auditing capabilities, enhanced traceability, and harmonised reporting standards.

AFMA remains committed to ensuring that its assurance framework evolves in line with international best practice while supporting efficient compliance and reducing unnecessary administrative burdens for members. This will position the industry to respond effectively to increasingly stringent domestic and international regulatory requirements, safeguard market access, and reinforce confidence throughout the feed and food value chain. In collaboration with industry stakeholders, regulators and value chain partners, AFMA will continue to promote a culture of continuous improvement, transparency and accountability.

These efforts will contribute to strengthening food and feed safety, enhancing consumer trust, and ensuring that the South African animal feed industry remains resilient, competitive and well-positioned to support national food security and agricultural growth. ^Δ

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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.



2. The Animal Feed Situation

The global animal feed industry remains a critical pillar of the livestock, poultry and aquaculture value chains, supplying balanced nutrition to a wide range of species, including poultry, pigs, dairy and beef cattle, aquaculture, pets and horses. The sector continues to support food security, animal protein production and rural economies, while also playing an increasingly important role in improving production efficiency, feed safety and sustainability.



According to the **2026 Alltech Agri-Food Outlook**, global feed production increased by 2.9% in 2025, reaching approximately 1.44 billion metric tons. While this points to continued growth in global animal agriculture, the report shows that the industry is operating in a more complex environment. Growth is being driven less by herd expansion and increasingly by structural changes such as commercialisation, industrial feed systems, improved feed efficiency and the transition from on-farm mixing to formal compound feed production in several regions.

The global feed industry is therefore shifting beyond a focus on volume alone towards resilience, operational efficiency, supply-chain stability and risk management. Disease pressure, geopolitical and macroeconomic uncertainty, volatile input costs, severe weather and sustainability expectations are increasingly shaping feed production and demand across regions.

2.1 The Global Feed Situation

Livestock, poultry and aquaculture production remain essential to global food security and nutrition. Animal feed is one of the most important inputs supporting the production of affordable and safe animal protein. The feed sector also supports more efficient livestock production systems by improving feed conversion, productivity and resource use.

The **top 10 feed-producing countries** remained unchanged between 2024 and 2025. Together, these countries accounted for 65.2% of global feed production in 2025, with

China remained the world's top feed-producing country in 2025, reaching 330.063 million mt, for a 4.8% increase year over year.



China, the United States and Brazil alone contributing approximately 47.7% of total global feed tonnage. China remained the largest feed-producing country, reaching 330.1 million metric tons, followed by the United States at 267.4 million metric tons and Brazil at 89.9 million metric tons.

China's growth was supported by continued commercialisation and the transition from self-mixed rations to industrial complete feed systems, particularly in the pig sector. Brazil recorded broad-based expansion across poultry, aquaculture, beef, dairy and pig feed, supported by strong export demand and improved feed cost structures. In contrast, the United States recorded a slight decline, largely due to the continued contraction of the cattle herd and lower beef feed demand, although broiler and dairy feed recorded growth.

Global feed production ranking – 2025 (million metric tons)

Rank	Country	Total Feed Production		%	Growth Tons
		2024	2025		
1	China	315,03	330,063	4,8%	15,033
2	United States	269,62	267,383	-0,8%	-2,237
3	Brazil	87,425	89,904	2,8%	2,479
4	India	55,243	57,729	4,5%	2,486
5	Mexico	41,401	41,883	1,2%	0,482
6	Russia	37,93	38,347	1,1%	0,417
7	Spain	38,812	37,507	-3,4%	-1,305
8	Vietnam	25,85	26,524	2,6%	0,674
9	Türkiye	24,55	25,48	3,8%	0,93
10	Japan	24,314	24,006	-1,3%	-0,308

Source: Alltech Agri-Food Outlook 2026

The **2026 Alltech Agri-Food Outlook** also shows that feed production differs significantly across regions and species. Asia remains the dominant region for pig, broiler, layer and aquaculture feed, while North America continues to lead in beef feed production. Europe remains an important contributor to pig, dairy, broiler, layer and pet food production, while Latin America is strongly supported by broiler and pig feed demand. Africa's feed profile reflects the continued growth of commercial poultry, dairy, layer and beef systems, supported by the broader intensification of livestock production across the continent.



Broiler feed grew 1.3% in North America to **60.4 million mt** – for the region's strongest increase among all major species in 2025.



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Feed production by region and species – 2025

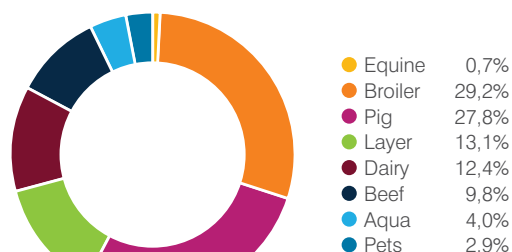
Region	Broiler	Layer	Pig	Dairy	Beef	Aqua	Pet	Equine
Africa	20,599	9,691	2,582	10,043	7,662	2,162	1,477	0,469
Asia	169,768	86,807	194,367	31,318	19,802	38,017	4,41	0,395
Europe	57,041	32,775	76,491	48,22	17,336	5,081	13,083	2,266
Latin America	74,766	26,763	43,042	23,221	16,206	7,641	8,218	1,181
Middle East	13,586	6,639	0,007	7,074	2,02	1,039	0,107	0,121
North America	60,358	16,406	63,053	48,76	70,308	1,281	11,371	5,3
Oceania	4,261	1,046	1,365	1,659	0,847	0,25	0,61	0,461
Total	400,379	180,126	380,907	170,294	134,181	55,47	39,276	10,194

Note: The table reflects the major species categories reported individually in the 2026 Alltech Agri-Food Outlook and does not include minor or "other" feed categories.

Looking at feed production by species, broiler feed remained the largest individual category in 2025, increasing by 3.7% to 400.4 million metric tons. Pig feed followed closely at 380.9 million metric tons, supported by recovery and commercialisation in several major pork-producing regions. Layer and dairy feed also recorded growth, reaching 180.1 million metric tons and 170.3 million metric tons respectively.

Aquaculture recorded the strongest growth rate among the major species categories, increasing by 4.7% to 55.5 million metric tons after several relatively flat years. Beef feed showed only modest growth of 0.5%, reflecting pressure from herd reductions, climate variability and profitability challenges in some regions. Pet food also continued to grow, supported by urbanisation, rising pet ownership and the continued humanisation of companion animals.

Global feed production by species – 2025



Source: Alltech – 2026

Overall, the **2026 Alltech Agri-Food Outlook** highlights an industry that continues to grow, but under very different conditions than in the past. Poultry and aquaculture remain important growth drivers, while ruminant systems are increasingly shaped by efficiency, sustainability and climate-related constraints. Disease risks such as highly pathogenic avian influenza and African swine fever continue to influence production

and trade flows, while geopolitical disruptions and input cost volatility remain important risks for feed manufacturers globally.

These trends show that the feed industry is no longer only competing on scale. Future competitiveness will depend increasingly on resilience, feed efficiency, biosecurity, sustainability readiness and the ability to adapt to volatile market conditions. For South Africa, these global developments are particularly relevant given the country's exposure to imported feed ingredients, logistics disruptions, animal disease risks and the need to maintain affordable animal protein supply.

2.2 Domestic Feed Situation

2.2.1 Raw material utilisation

The composition of raw materials used by AFMA members remained relatively stable over the five-year reporting period. Maize and maize products consistently accounted for around half of total raw material usage, contributing approximately 49% to 51% across the period and 50% in 2025/26.

Oilcakes contributed approximately 19% to 20% of total raw material usage, with their share reaching 20% in 2025/26. Together, maize and maize products and oilcakes accounted for approximately 69% to 70% of total raw material usage throughout the period.



Overall, the data indicate a relatively stable raw-material composition, with maize and maize products remaining the dominant component and oilcakes continuing to represent a significant share of the raw-material mix.

The composition of selected critical raw materials highlights the main ingredients used by AFMA members during the 2021/22 to 2025/26 reporting periods (April–March). Local yellow maize increased substantially over the period, from 23.1% of

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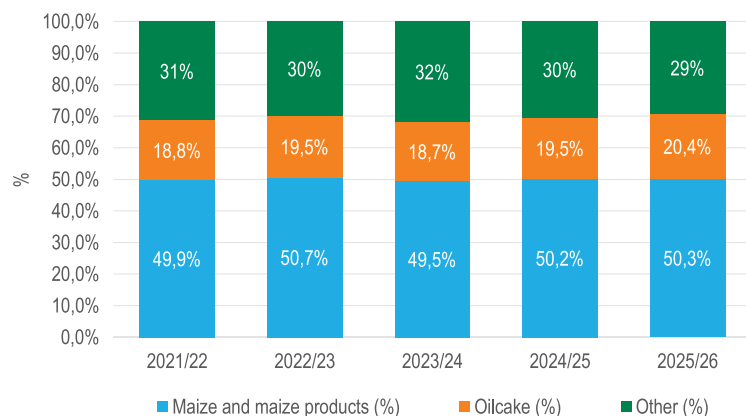
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total raw material usage in 2021/22 to 38.2% in 2025/26. Although its share declined from the 41.7% recorded in 2024/25, it remained substantially above levels recorded earlier in the five-year period.

Maize and oilcake as a share of total raw material usage by AFMA members



Source: AFMA statistics

Over the same period, local white maize declined sharply, from 24.0% in 2021/22 to 5.2% in 2025/26. Imported yellow maize increased from 0.8% to 5.4%, indicating a clear shift in maize usage away from white maize towards yellow maize, with a growing imported component in the latest reporting period.

The protein component also shifted increasingly towards locally produced soya oilcake. Its contribution increased from 8.7% in 2021/22 to 14.4% in 2025/26, while imported soya oilcake declined from 5.9% to 1.5% over the same period. This reflects an increasing share of locally produced soya oilcake in AFMA members' raw material mix. Sunflower oilcake remained relatively stable, contributing between 2.6% and 3.0% over the five-year period and accounting for 2.7% in 2025/26.

The contribution of wheaten bran remained stable at around 6.4%–6.7% throughout the period. Molasses showed a slight overall decline, from 4.8% in 2021/22 to 4.4% in 2025/26.

Collectively, the selected critical raw materials accounted for 76.6% of total raw material usage in 2021/22, 78.3% in 2022/23, 76.6% in 2023/24, 77.6% in 2024/25 and 78.3% in 2025/26. This indicates that the overall composition remained relatively concentrated around the same core grain, protein and by-product ingredients, with the most significant structural changes occurring within the maize and soya-oilcake categories.

Combined share of selected critical raw materials (%)

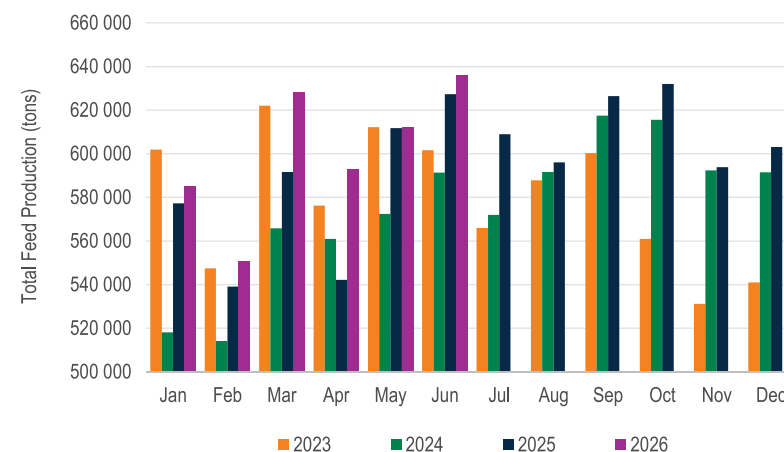
	2021/22	2022/23	2023/24	2024/25	2025/26
Maize (Yellow) – Local	23,1%	29,5%	30,7%	41,7%	38,2%
Soya Oilcake (Local)	8,7%	10,6%	11,3%	12,3%	14,4%
Wheaten Bran	6,6%	6,5%	6,7%	6,5%	6,4%
Maize (Yellow) – Imported	0,8%	0,6%	0,7%	4,6%	5,4%
Maize (White) – Local	24,0%	18,8%	16,3%	2,3%	5,2%
Molasses	4,8%	4,5%	4,9%	4,7%	4,4%
Sunflower Oilcake (Local)	2,7%	3,0%	2,7%	2,6%	2,7%
Soya Oilcake (Imported)	5,9%	4,7%	3,4%	2,9%	1,5%
Total Makeup in Feed	76,6%	78,3%	76,6%	77,6%	78,3%
Total Raw material usage	6 920 643	7 065 514	6 719 947	6 949 190	6 856 606

Source: AFMA statistics

2.2.2 Animal feed production supply

The graph below illustrates the monthly trend in total animal feed production from 2023 to June 2026. Feed production strengthened further during the first half of 2026, with production exceeding the corresponding 2025 levels in each of the first six months.

Total monthly animal feed production trends



Source: AFMA statistics

Cumulative production for January to June 2026 reached 3.605 million tons, representing an increase of 3.3% compared with the same period in 2025. June 2026 recorded 636,004 tons, the highest monthly production level shown in the series. This follows the stronger performance recorded in 2025, when annual feed production reached approximately 7.15 million tons, up 3.6% from 2024. Production in 2025

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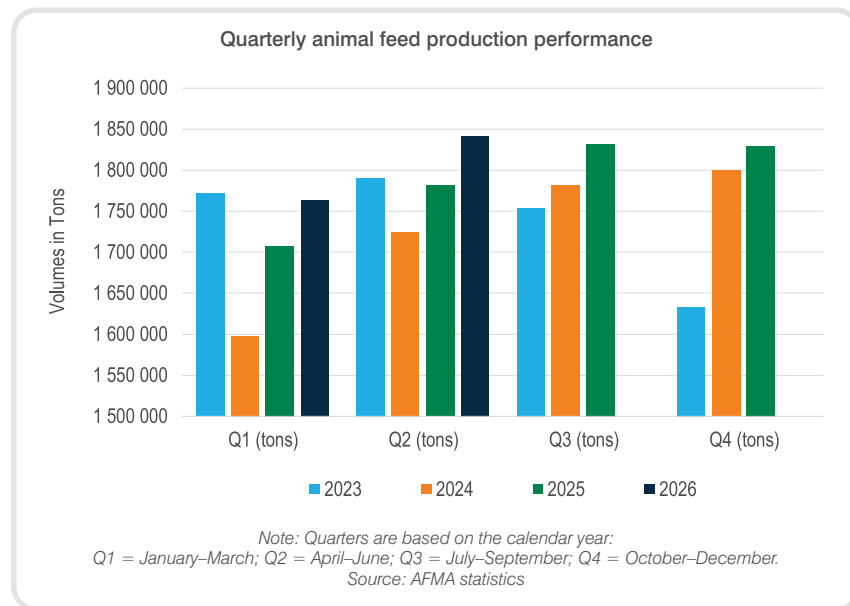


exceeded the corresponding 2024 level in 11 of the 12 months, with April the only exception.

Overall, the data show stronger feed production levels from 2024 into the first half of 2026, while monthly fluctuations remain evident across the period.

Quarterly data shows continued growth in animal feed production during the first half of 2026, with production exceeding the corresponding 2025 levels in both the first and second quarters. Production increased from 1.708 million tonnes in Q1 2025 to 1.764 million tonnes in Q1 2026, representing growth of 3.3%. This was followed by a further increase in Q2, when production reached 1.841 million tonnes, 3.4% above the 1.781 million tonnes recorded in Q2 2025.

Q2 2026 also recorded the highest quarterly production level in the available 2023–2026 data, exceeding the previous peak of 1.831 million tonnes in Q3 2025. Combined production for the first half of 2026 reached 3.605 million tons, 3.3% higher than the 3.489 million tons recorded during the corresponding period in 2025, confirming that production remained above 2025 levels during the first half of 2026.



The composition of AFMA feed production remained strongly weighted towards poultry feed. In 2025/26, broiler feed accounted for 44.8% of total production, above its five-year average of 43.7%. Layer feed increased its share from 11.7% in 2024/25 to 12.9% in 2025/26, while breeder feed accounted for 8.6%. Together, broiler, layer and breeder feed represented approximately 66.3% of total AFMA feed production.

Dairy feed contributed 13.8% of total production, broadly in line with its five-year average of 13.6%, while pig feed remained relatively stable at 6.4%. The contribution of beef and sheep feed declined to 10.5%, compared with 11.8% in 2024/25 and a five-year average of 11.8%.

The remaining feed categories each accounted for less than 2% of total AFMA feed production in 2025/26.

Overall, the five-year trend highlights the continued importance of the poultry sector to AFMA feed production, while the lower contribution of beef and sheep feed in 2025/26 is consistent with the weaker production performance recorded in this category during the year.

Species contribution to total AFMA feed production, 2021/22–2025/26 (%)

	2021/22	2022/23	2023/24	2024/25	2025/26	5-years Average
Dairy Feed	13,22%	12,82%	14,12%	14,23%	13,84%	13,64%
Beef & Sheep Feed	13,00%	11,46%	12,26%	11,84%	10,54%	11,82%
Pig Feed	6,54%	6,36%	6,55%	6,61%	6,39%	6,49%
Layer Feed	14,14%	13,08%	11,54%	11,74%	12,89%	12,68%
Broiler Feed	41,84%	44,12%	43,92%	43,96%	44,82%	43,73%
Horse Feed	0,32%	0,33%	0,35%	0,33%	0,32%	0,33%
Dog Food	0,02%	0,01%	0,02%	0,05%	0,05%	0,03%
Breeder Feed	7,61%	8,70%	8,24%	8,37%	8,55%	8,29%
Aquaculture Feed	0,13%	0,12%	0,13%	0,12%	0,12%	0,13%
Ostrich Feed	0,13%	0,14%	0,09%	0,17%	0,19%	0,14%
Rabbit Feed	0,03%	0,02%	0,02%	0,01%	0,01%	0,02%
Game Feed	0,35%	0,28%	0,34%	0,46%	0,38%	0,36%
Other Feed	2,67%	2,55%	2,42%	2,11%	1,89%	2,33%

Source: AFMA statistics

Feed production reported by AFMA members increased from 7.01 million tons in 2024/25 to 7.21 million tons in 2025/26, representing growth of 2.7%. Growth was led by the poultry-feed categories. Broiler feed remained the largest category, increasing by 4.7% to 3.23 million tons and accounting for 44.8% of total AFMA feed production. Layer feed recorded the strongest growth among the major feed categories, increasing by 12.8% to 929,011 tons, while breeder feed increased by 4.9% to 615,756 tons.

Performance across the other major categories was more mixed. Dairy feed remained broadly stable, declining by just 0.1% to 997,348 tons, while pig feed declined by 0.7% to 460,403 tons. Beef and sheep feed recorded the largest decline among the major categories, decreasing by 8.6% to 759,547 tons.

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Among the smaller feed categories, ostrich feed recorded the strongest growth at 18.6%, followed by dog food at 9.1%, rabbit feed at 4.1% and aquaculture feed at 1.3%. Horse feed also remained broadly stable, increasing by 0.3%. In contrast, game feed declined by 15.0%, while the other-feed category declined by 7.6%.

Overall, the 2025/26 results highlight the continued importance of poultry to AFMA feed production. Broiler, layer and breeder feed together accounted for approximately 66.3% of total production, with growth across all three categories supporting the overall increase in AFMA feed production during the year.

AFMA feed production by species: 2024/25 vs 2025/26 (April–March) (tons)



Total Feed

2024/25
7 013 459

2025/26
7 205 550

Growth
+2,74%

Feed Type	2024/25	2025/26	2024/25	2025/26	% Growth
Dairy Feed			997 857	997 348	↓ -0,05%
Beef & Sheep Feed			830 684	759 547	↓ -8,56%
Pig Feed			463 685	460 403	↓ -0,71%
Layer Feed			823 486	929 011	↑ 12,81%
Broiler Feed			3 083 162	3 229 172	↑ 4,74%
Horse Feed			23 190	23 258	↑ 0,29%
Dog Food			3 229	3 524	↑ 9,14%
Breeder Feed			586 961	615 756	↑ 4,91%
Aquaculture Feed			8 648	8 761	↑ 1,31%
Ostrich Feed			11 843	14 043	↑ 18,58%
Rabbit Feed			1 009	1 050	↑ 4,06%
Game Feed			32 060	27 236	↓ -15,05%
Other Feed			147 647	136 438	↓ -7,59%
Total Feed			7 013 459	7 205 550	↑ 2,74%

Source: AFMA statistics

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AFMA feed production by province and SADC region, 2025/26 (April–March) (tons)

Species	EC	FS	GP	KZN	LP	MP	NW	SADC	WC
Dairy Feed	241 693	62 781	27 480	223 761	169	17 771	16 401	1 344	405 948
Beef & Sheep Feed	27 248	94 238	17 152	244 515	3 169	247 650	18 573	18 728	88 276
Pig Feed	16 798	141 850	43 819	29 187	1 494	54 919	30 770	13 647	127 921
Layer Feed	31 270	224 275	267 242	50 237	5 151	97 531	107 039	16 595	129 670
Broiler Feed	193 401	561 365	585 312	283 092	106 446	447 130	459 258	116 966	476 200
Horse Feed	716	0	14 935	105	2 760	3 625	0	778	339
Breeder Feed	27 519	41 979	157 518	103 184	56	86 284	31 411	102 146	65 662
Aquaculture Feed	0	0	2 182	0	0	0	0	0	6 578
Ostrich Feed	193	0	196	0	74	195	0	0	13 386
Rabbit Feed	92	0	895	6	17	0	0	41	0
Game Feed	249	3 453	3 424	111	2 904	8 937	67	1 287	6 805
Other Feed	6 233	23 793	8 154	4 325	830	53 157	8 680	6 767	24 497

Source: AFMA statistics

The provincial distribution of AFMA feed production during 2025/26 (April 2025 to March 2026) was broadly consistent with the geographic concentration of the livestock and poultry value chains served by AFMA members. Broiler feed remained the dominant feed category across most of the major producing provinces, with the highest volumes recorded in Gauteng (585,312 tons), followed by the Free State (561,365 tons), Western Cape (476,200 tons), North West (459,258 tons) and Mpumalanga (447,130 tons).

Dairy feed production was concentrated mainly in the Western Cape (405,948 tons), Eastern Cape (241,693 tons) and KwaZulu-Natal (223,761 tons). Beef and sheep feed production was highest in Mpumalanga (247,650 tons) and KwaZulu-Natal (244,515 tons), followed by the Free State and Western Cape.

The distribution of the other major feed categories also shows clear regional concentration. Layer feed was concentrated in Gauteng and the Free State, while pig feed recorded its highest volumes in the Free State and Western Cape. Breeder feed was highest in Gauteng and KwaZulu-Natal, with substantial volumes also supplied to the SADC region, followed by Mpumalanga.

Among the smaller categories, aquaculture and ostrich feed were concentrated predominantly in the Western Cape. Feed supplied to the SADC region was particularly notable for broiler feed (116,966 tons) and breeder feed (102,146 tons).

Overall, the distribution of AFMA feed production shows clear geographic concentration across the major livestock and poultry feed categories.

2.2.3 National animal feed production

AFMA's total feed production, including feeds produced from concentrates, amounted to 7 446 378 tons, compared with total national feed production of 12 633 903 tons, representing an overall contribution of 58.9%. The strongest AFMA contribution was recorded in broiler feed, where production of 3 847 228 tons accounted for 99.9% of the national total of 3 849 623 tons, followed by aquaculture feed, where 8 761 tons represented 91.2% of national production. AFMA also maintained a particularly strong presence in layer feed, contributing 952 026 tons, or 76.5%, of the 1 244 988 tons produced nationally. In the major livestock feed categories, AFMA produced 1 039 681 tons of dairy feed, representing 39.1% of national production of 2 657 666 tons; 1 014 968 tons of beef and sheep feed, equivalent to 34.0% of 2 983 225 tons nationally; and 503 353 tons of pig feed, accounting for 42.0% of the national total of 1 198 208 tons. AFMA's contribution was lower in the more specialised feed categories, including horses at 16.9%, ostriches at 12.0%, and dogs at 0.8% of national production. In addition, AFMA recorded 39 518 tons under the "Other" category, for which no comparable national production figure was available (see infographic on next page).

National animal feed production versus AFMA member contribution

Feed Type	AFMA – Feeds Plus, Feeds Derived From Concentrates	** National Feed Production	AFMA Feed as % of National Production
Dairy	1 039 681	2 657 666	39,1
Beef & Sheep	1 014 968	2 983 225	34,0
Pigs	503 353	1 198 208	42,0
Layers	952 026	1 244 988	76,5
Broilers	3 847 228	3 849 623	99,9
Dogs	3 542	436 446	0,8
Horses	23 258	137 510	16,9
Ostriches	14 043	116 632	12,0
Aquaculture	8 761	9 605	91,2
Other	39 518	-	-
Total	7 446 378	12 633 903	58,9

Source: AFMA statistics & Dr Briedenhann Modelling

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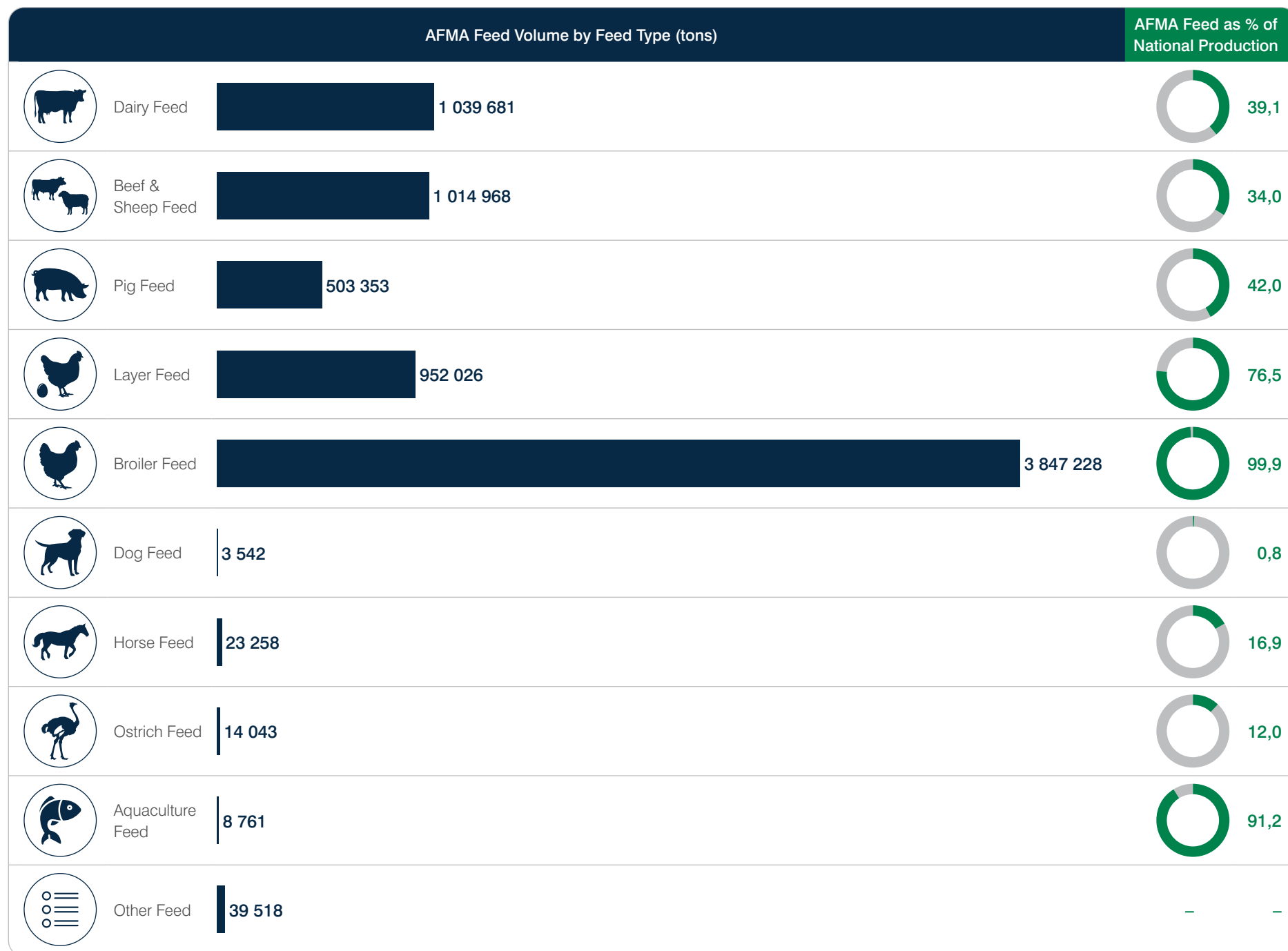
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AFMA feed production overview



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3. Trade Committee Matters

3.1 Strategic Focus Areas

The AFMA Trade Committee addresses trade-related matters that may influence the procurement, availability and supply of raw materials and feed ingredients used by the animal feed industry.



The Committee's key focus areas include:

- > **monitoring** global and domestic commodity trends and developments that affect market dynamics;
- > **facilitating** industry procedures and requirements at both local and international levels;
- > **engaging** on import tariff negotiations; providing input on government policies that affect trade;
- > **addressing** agro-logistics and infrastructure matters; and
- > **fostering** strategic collaboration with value chain partners to advance the interests of AFMA members and support a stable and competitive feed industry.

During 2025/26, the committee continued to investigate and facilitate the soymeal import duty review, and JSE soymeal futures contract as strategic focus areas.

3.1.1 Soymeal import duty review

The Trade Committee continued its work on the possible review of the soybean oilcake import duty, with the objective of assessing its impact on feed costs and the competitiveness of the broader livestock value chain. Following the completion of an independent economic assessment

and engagements with the International Trade Administration Commission (ITAC), the Committee carefully considered the potential benefits and practical likelihood of securing a reduction in the existing import duty.

The assessment concluded that, while the economic benefits of reducing the duty were positive, the prevailing industrial policy environment and ITAC's policy criteria significantly reduced the prospects of a successful application. Consequently, the Committee recommended, and the AFMA Board subsequently endorsed, that AFMA should not proceed with a formal import duty application at this stage. Instead, the Committee agreed to engage proactively with the Department of Trade, Industry and Competition (the dtic) to explore rebate mechanisms and emergency import arrangements that could be activated during periods of domestic supply shortages or severe drought conditions. This approach ensures that the industry remains prepared to respond rapidly to future supply disruptions while maintaining constructive engagement with policymakers.

3.1.2 JSE soymeal futures contract

Significant progress was made towards the development of a physically settled soybean meal futures contract on the JSE. During the reporting period, the Trade Committee continued working closely with the JSE and industry stakeholders to refine the contract specifications, with particular emphasis on improving price transparency and strengthening price risk management within the feed industry. Key technical refinements included agreement to increase the contract size from 32 to 35 tonnes to better align with commercial truckload logistics, together with further work on delivery procedures, contract enforcement, storage requirements and operational management of delivery variances. The Committee reaffirmed its support for the initiative and will continue

collaborating with the JSE to finalise the legal, operational and market requirements necessary for the successful implementation of the contract.

3.2 Other Trade Matters

3.2.1 Maize supplier declaration

AFMA continued to participate in the Maize Forum and Maize Steering Committee initiatives aimed at strengthening industry-led food safety and traceability within the maize value chain, including the development of the Maize Supplier Declaration. The initiative was particularly relevant given the increased industry focus on the need for stronger traceability and food-safety assurance for maize supplied to the feed industry. Following engagement with relevant grain industry stakeholders, it was agreed that the existing industry Food Safety Code provides an appropriate foundation for implementing the supplier declaration, thereby avoiding the need to establish a separate grain passport system. While the initial project envisaged the development of a standardised grain passport and implementation framework, the initiative has since matured and is no longer considered a priority for AFMA as a standalone project.

3.2.2 Sulphate

The International Trade Administration Commission (ITAC) concluded its investigation into the proposed copper sulphate rebate facility during the reporting period. The investigation followed the increase in the customs duty on copper sulphate from duty free to 10% ad valorem and considered the potential unintended impact of the increased duty on the animal feed manufacturing sector.

In November 2025, ITAC decided not to recommend the creation of a rebate facility, based on its assessment that an established domestic manufacturer had sufficient installed production capacity to meet local demand. This was despite concerns raised by AFMA members regarding quality assurance and the continuous supply of suitable copper sulphate to the local industry. The matter was therefore concluded, with no further action required from AFMA at this stage.

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3.2.3 Wheat dollar-based reference price and trigger mechanism

AFMA continued monitoring the proposed amendments to South Africa's wheat tariff system, specifically the increase in the dollar-based reference price and the introduction of an automatic tariff trigger mechanism. Although AFMA has consistently supported greater predictability through an automated tariff adjustment process, ITAC did not support the proposed amendments during the reporting period. AFMA is awaiting the detailed reasons underpinning the decision and will continue engaging with stakeholders while monitoring any future policy developments affecting the wheat tariff framework.

3.2.4 Soybean multiple reference point

The JSE concluded its comprehensive review of the Multiple Reference Points (MRP) model, which had been piloted over the past two marketing seasons to calculate the location differential for soybean futures contracts. Following extensive stakeholder consultation and an assessment of

the model's performance, the JSE determined that the MRP model had not delivered the intended improvements in market efficiency or transparency. The review identified several structural and operational challenges, including difficulties in obtaining auditable crushing data, reliance on historical information that did not adequately reflect market dynamics, limited transparency arising from commercially sensitive data, and inconsistent industry confidence in the methodology. Consequently, the JSE resolved to revert to a single reference point model for determining location differentials on soybean futures contracts. In addition, the JSE has proposed replacing Randfontein with Driefontein as the soybean reference point, given its proximity to the country's major soybean consumption and processing areas. Subject to industry consultation, implementation is proposed for the marketing season commencing 1 March 2027.

3.2.5 Commitment of trader's report

AFMA continued advocating for the publication of a Commitment of Traders (CoT) report to improve

transparency within South Africa's agricultural futures markets. Progress has been made through continued engagement with the JSE, which is preparing a formal submission to National Treasury as part of the broader Financial Markets Act review process. While legislative amendments remain necessary before implementation, interim mechanisms continue to be explored to advance greater market transparency.

3.2.6 Dispute/sampling protocol

Work continued on the development of a standardised grain dispute and sampling protocol for the industry. Progress during the reporting period focused on advancing the complementary Sampling Protocol and assessing the proposed sampling methodology to support more consistent dispute resolution.

The next phase will focus on completing stakeholder consultations, finalising the protocol documentation and progressing implementation of the agreed sampling approach to promote greater consistency in the resolution of grain quality disputes. 

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The Trade Committee continued its work on the possible review of the soybean oilcake import duty, with the objective of assessing its impact on feed costs and the competitiveness of the broader livestock value chain.



4. Technical Committee Matters

4.1 Strategic Focus Areas

The Technical Committee continued to advance AFMA's strategic objective of enabling innovative, science-based animal nutrition while strengthening feed safety, responsible manufacturing and evidence-based industry decision-making.



The Committee's key initiatives:

- > During 2025/26, several key initiatives progressed from technical development towards practical application.
- > The Committee also continued its industry surveillance programmes for Salmonella, mycotoxins, dioxins and PCBs, providing valuable data to support proactive feed safety risk management.

4.1.1 Nutrient Guideline Revision Project (NGRP)
The Nutrient Guideline Revision Project (NGRP) reached an important transition point during 2025/26, moving from the development of revised nutritional standards towards regulatory alignment and publication, and ultimately industry implementation. Following publication of the draft amended Farm Feed Regulations in **January 2026**, AFMA continued working with the Registrar and Act 36 to finalise and align the supporting Farm Feed Guidelines and nutrient specification tables, including nutrient guarantees and associated labelling requirements for the different species.

The revised framework is intended to provide clearer and more practical requirements for product registration, nutrient guarantees and labelling, while allowing greater flexibility to accommodate

advances in nutritional science, new feed categories and changing industry practices. Importantly, the guideline-based approach should enable technical requirements to be updated more efficiently in future without requiring the Regulations themselves to be republished each time. The industry is now awaiting the formal publication of the final amended Regulations and completion of the supporting Guidelines. Once implemented, members will need to assess existing product registrations, nutrient guarantees and labels against the revised requirements and make amendments where applicable. AFMA will support members through this transition by publishing a practical, user-friendly Nutrient Guideline and providing implementation guidance, with a phased approach aimed at allowing sufficient time for the necessary changes. The NGRP is therefore entering its most important phase:



Turning almost a decade of collaborative scientific work into a modern, science-based and practical nutritional framework for the South African feed industry.

4.1.2 Antimicrobial Resistance (AMR) Alliance and Advocacy
Antimicrobial resistance (AMR) remained a key strategic priority during 2025/26, with the AFMA Board identifying this as one of the most important workstreams for the Technical Committee going forward. AMR continues to be a significant global and national priority. Against this background, it is increasingly important that AFMA has a clear industry position and credible feed-sector data to demonstrate how antimicrobials are used and responsibly managed, and to support meaningful engagement in future policy and regulatory discussions.

Building on AFMA's participation in the AMR Industry Alliance and broader national One Health discussions over the past year, AFMA substantially revised its AMR Position Statement during the year. The updated position adopts a broader prevention- and stewardship-based approach, recognising the feed industry's role not only in responsible antimicrobial use, but also in reducing the need for antimicrobials through adequate nutrition, nutritional innovation, feed safety and hygiene, biosecurity, animal resilience and responsible feed manufacturing practices. The revised Position Statement was approved by the Technical Committee in 2026 and proceeded to the AFMA Board for final adoption.

A significant challenge identified through national AMR discussions is the lack of reliable, standardised and comparable antimicrobial usage data. This presents a strategic risk for the feed industry: without credible sector-specific evidence, AFMA cannot effectively demonstrate the industry's actual antimicrobial use or meaningfully inform future policy and regulatory decisions.

The next phase will focus on practical implementation, including the development of *Prudent Use Guidelines* for the animal feed industry and a framework to determine what antimicrobial usage (AMU) data should be captured, monitored and verified. AFMA will also explore how existing systems and potential electronic reporting mechanisms could support standardised and confidential data collection.

4.1.3 Biosecurity in feed mills
Biosecurity remains an important component of feed safety and disease prevention, with feed mills playing a key role in preventing the introduction and spread of biological hazards through raw materials, people, vehicles, equipment and feed distribution. To strengthen industry awareness and practical implementation of biosecurity measures, AFMA launched its Biosecurity in Feed Mills Self-Study and Quiz in February 2026. Based on the International Feed Industry Federation (IFIF) Biosecurity Guideline, the initiative provides practical guidance across feed

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mill operations, including receiving, manufacturing, dispatch, transport and personnel. A CPD-accredited version is also available for SACNASP-registered animal scientists. The initiative aims to move biosecurity beyond theoretical awareness by encouraging behavioural change and the practical application of preventative measures within feed manufacturing facilities. Industry participation has been encouraging, with 114 participants having completed the quiz by June 2026. Building on this initiative, AFMA is developing a practical biosecurity self-assessment tool for feed mills, aligned with IFIF and FAO guidance, relevant international industry tools and the AFMA Code of Conduct. The tool is intended to assist members in assessing their biosecurity practices, identifying potential risks and gaps, and strengthening preventative controls throughout their operations. Together, these initiatives aim to provide members with practical resources to continually strengthen biosecurity from raw-material intake through to final dispatch, while supporting a stronger culture of prevention and responsible feed manufacturing across the industry.

4.2 Feed Safety Monitoring

AFMA's feed safety monitoring programmes

provide an industry-wide view of emerging contamination risks. These voluntary programmes support responsible manufacturing, regulatory compliance and early intervention.

Monitoring covers raw materials, finished feed and the feed-mill environment. Monitoring continues to focus on **Salmonella**, **mycotoxins**, **dioxins** and **PCBs**, with member data analysed to identify trends, strengthen risk-based controls and support informed industry decision-making.

4.2.1 Salmonella

Since 2005, **AFMA's Salmonella Monitoring Programme** has developed a substantial industry dataset covering raw materials, finished feed and feed-mill environmental samples. **AFMA's electronic Salmonella Monitoring System** now contains more than 195,000 sample records, providing a robust industry-wide database to support feed safety monitoring, risk assessment and informed decision-making. The programme represents an important resource for demonstrating industry due diligence and supporting the ongoing management of Salmonella risks across the feed supply chain. Going forward, AFMA aims to strengthen the reporting and use of these data, providing greater value to participating members and unlocking the full potential of this long-standing industry monitoring programme.

4.2.2 Mycotoxins

Now entering its 11th year, the **SAGL Maize Mycotoxin Monitoring Programme** continues to provide AFMA members with valuable insight into mycotoxin risks in maize after storage and upon delivery to food and feed processing facilities. The programme is conducted by the South African Grain Laboratory (SAGL) with funding from the Maize Trust and remains an important component of AFMA's proactive feed safety monitoring.

During Year 10, 362 maize samples were analysed, comprising 174 white and 188 yellow maize samples. HT-2 toxin, T-2 toxin and ochratoxin A were not detected, while only one white-maize sample recorded an elevated aflatoxin B₁ level. Fumonisin, deoxynivalenol (DON), zearalenone and Diplodia toxins remained the main contaminants of concern,

with and 95% of samples containing more than one highlighting the importance of continued monitoring for multiple mycotoxins. Elevated Diplodia levels also indicated an emerging risk that requires continued monitoring. The final Year 10 report was shared with participating members. The programme continued into Year 11 during 2026, with 109 samples submitted during the first sampling cycle by 22 AFMA members. It remains an important early-warning and benchmarking tool, helping members strengthen raw-material testing, storage controls, supplier management and risk-based feed formulation. Broader participation strengthens the national dataset, improves the identification of emerging and regional risks, and provides a more representative industry-wide view of mycotoxin risk.

4.2.3 Dioxin & PCBs

AFMA's Dioxin and PCB Monitoring Programme, established in 2011, supports risk-based monitoring of feed materials and assists members in demonstrating regulatory compliance, strengthening supplier assurance and protecting the integrity of the feed and food chain. The consolidated dataset now comprises more than 2,300 samples, including over 1,600 PCB screening results and almost 700 quantitative analyses. Reassuringly, all reported results remained within the applicable South African regulatory limits. Approximately 79% of samples represented higher-risk or regulatory-priority materials, including oils and fats, fish products and derivatives, and mineral or clay products. Participation remains an area for improvement, with 32 members contributing results. AFMA will continue encouraging wider participation, particularly among members handling higher-risk raw materials, and will align the monitoring framework with final regulatory requirements. 



5. Regulatory Committee Matters

5.1 Strategic Focus Areas

The Regulatory Committee continued to support AFMA's second and third strategic pillars by advocating for a modern, science-based and practical regulatory framework, while strengthening effective industry self-regulation.



During 2025/26, key focus areas included:

- > the Farm Feed Regulation amendments and supporting guidelines;
- > development of the Feeds and Pet Food Bill;
- > resolution of the Hominy Chop regulatory matter; and
- > modernisation of the AFMA Code of Conduct.

These workstreams are important to AFMA members as they directly influence regulatory compliance, feed safety, market access and industry competitiveness. Through continued technical and/or regulatory input, member consultation and engagement with regulatory authorities, AFMA aims to ensure that regulatory developments are practical, risk-based and informed by industry realities, while supporting members in preparing for both current requirements and South Africa's evolving feed regulatory framework.

5.1.1 Farm Feed Regulation amendments

The amendment of the Farm Feed Regulations under Act 36 of 1947 reached an important milestone during 2025/26, with the proposed amended Regulations published for public comment on 16 January 2026. AFMA coordinated an industry review through its advisory structures and a

dedicated member webinar, with consolidated comments submitted to the Department on 16 February 2026.

The updated Regulations will bring together the 2006 Farm Feed Regulations, the 2010 Undesirable Substances Regulations and subsequent amendments and correction notices into a single regulation, making the regulatory framework easier to navigate and apply. The amendments introduce an updated registration and amendment framework, with a clearer distinction between minor administrative and technical amendments, as well as revised definitions and updated provisions for labelling, advertising, Good Manufacturing Practices (GMP), traceability and recall, laboratory testing, imports and registration renewals. Feed safety requirements have also been strengthened through updated limits for certain undesirable substances and, for the first time, prescribed carry-over limits for authorised feed additives in non-target feed following unavoidable carry-over.

Several of the proposed changes should also provide practical benefits for industry. These include moving away from the pre-market approval of advertisements towards greater responsibility for compliant advertising, updating labelling requirements to better reflect current industry practices, and introducing a clearer distinction between technical and minor administrative amendments. Changes such as certain packaging and artwork updates, additional pack sizes, removal of claims or pictorials, foreign-language changes and updates to registration-holder contact details will follow a simplified notification process, reducing unnecessary regulatory administration where the technical nature of the registered product is unaffected.

Following publication, a small working group comprising AFMA, the Pet Food Industry Association

(PFI) and AIC reviewed the two supporting Regulatory Guidelines. The work focused on removing duplication and inconsistencies between the Regulations and Guidelines, restructuring feed-material categories, incorporating appropriate technical tables by reference, and aligning registration forms and administrative processes with the updated framework.

The Guidelines are also being restructured to provide a clearer separation between registration processes and technical feed requirements. The first Regulatory Guideline will focus on the registration and ongoing maintenance of farm feed registrations, while the second will consolidate the technical requirements for animal feeds, including feed ingredient standards, classification and labelling, nutrient guarantees and species-specific nutrient standards, pet food nutrient specifications, permissible claims, and requirements for stock remedies, veterinary medicines and medicated feeds.

As the Regulations and supporting Guidelines move towards finalisation, attention is increasingly focused on practical implementation. The proposed six-month implementation period will commence from final publication, and AFMA has recommended a phased approach to necessary label and registration amendments, where appropriate, to avoid unnecessary pressure on members and the registration system. AFMA will continue supporting members through implementation guidance, awareness webinars and registration workshops once the final framework and transitional arrangements are confirmed.

5.1.2 Hominy Chop Repeal Notice

Following more than a decade of consideration, the proposed repeal of the longstanding Hominy Chop exemption under Notice No. R.2054 of 14 September 1984 was withdrawn in 2026. The latest proposal to repeal Exemption Notice R.2054 of 14 September 1984 was formally published for public comment on 6 June 2025 under Government Notice No. 6284 (Government Gazette No. 52814).

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AFMA's industry response was supported by extensive technical work, including moisture surveys covering more than 2,800 samples, research with the University of the Free State and consultation across the feed and maize-milling value chain. The evidence demonstrated that the risks associated with Hominy Chop can be appropriately managed through existing quality-assurance and risk-management practices.

Following AFMA's consolidated industry recommendation, the Registrar notified industry and stakeholders on 18 May 2026 that the proposed repeal had been withdrawn, retaining the existing exemption. The outcome avoids unnecessary registration and regulatory burden, maintains access to an important feed ingredient and demonstrates the value of science-based, risk-proportionate regulation supported by industry data and constructive engagement. AFMA will continue engagement with relevant stakeholders on practical guidance for the appropriate storage, handling and quality management of bagged Hominy Chop.

5.1.3 Feeds and Pet Food Bill

The Feeds and Pet Food Bill remained a key focus in the modernisation of South Africa's animal feed regulatory framework during 2025/26. Modernisation is an important step towards replacing the outdated feed provisions under Act 36 of 1947 with dedicated legislation better equipped to respond to advances in feed science and technology, evolving feed and food safety risks, increasingly complex supply chains and international trade.

The modernisation process aims to establish a more science-based, risk-based and preventive regulatory framework, with greater emphasis on facility licensing, preventive controls, traceability and proportionate product registration. The intended outcome is to strengthen feed and food safety while reducing unnecessary regulatory burden, enabling innovation and supporting food security, competitiveness and market access.

AFMA will continue to engage constructively as the Bill progresses. Of particular importance will be the

development of the supporting regulatory framework alongside the Bill, as this will determine how the legislative principles are practically implemented. Consultation with AFMA members on the Bill and supporting framework will therefore be central to developing AFMA's final industry position.

AFMA remains committed to a practical, proportionate and internationally aligned regulatory framework that strengthens feed and food safety while reducing unnecessary regulatory burden and supporting innovation, competitiveness and the long-term sustainability of South Africa's animal feed industry.

5.2 Industry Self-Regulation

Industry self-regulation remains an important part of AFMA's commitment to safe, responsible and compliant feed production, complementing regulatory oversight through practical industry-led controls. AFMA's self-regulatory framework continues to centre on the AFMA Code of Conduct, Transport Protocol and Early Warning System (EWS), with significant attention during 2025/26 directed towards strengthening the Code of Conduct and its future role within a more risk-based regulatory environment.

5.2.1 Modernisation of the AFMA Code of Conduct

The AFMA Code of Conduct (CoC) remains a cornerstone of industry self-regulation, providing an industry-specific framework that translates South Africa's feed legislative requirements into practical requirements for responsible feed businesses. Compliance with Act 36 of 1947 and the Farm Feed Regulations, together with Good Manufacturing Practices (GMP), feed safety and responsible business practices, remains fundamental to the Code. At its core is AFMA's philosophy of Safe Feed for Safe Food - recognising that effective controls throughout the feed chain protect animal health, food safety and confidence in the industry.

The survey, benchmarking and pilot work identified opportunities to strengthen audit consistency and depth, feed-specific auditor competence, practical on-site verification and reporting, and recognition of



existing certification, while reducing unnecessary duplication. Importantly, AFMA's 2024-member survey showed that 57% of members assessed held no other formal quality or feed-safety certification, comprising 48% of Full Members and 65% of Associate Members. This reinforces the importance of a credible, industry-specific AFMA framework that provides a common foundation for demonstrating regulatory compliance, feed safety and responsible manufacturing across the membership.

The modernised framework will continue to support compliance with current legislation while increasingly applying a preventive, risk-based approach aligned with evolving global feed-safety practices and future anticipated legislative changes. It will encompass regulatory compliance, leadership and accountability, Preventive Control Programmes (PCPs) across the feed operation – from site and infrastructure, supplier approval and purchasing, through receiving and raw-material controls, equipment and maintenance, manufacturing and process controls, product verification and storage, to dispatch and transport. These foundational controls will be supported by a documented Preventive Control (Feed Safety) Plan, through which facilities identify and assess hazards, establish appropriate controls, validate and monitor their effectiveness, respond when control is lost, and continually verify and improve the system. Traceability, recall and withdrawal, non-conformance management and emergency preparedness will further strengthen the framework. The underlying principle is simple: **prevention is better than cure**.

A further improvement will be the implementation of an electronic audit-management system, incorporating electronic checklists, audit reporting, corrective-action and non-conformance management, automated reminders and escalation, and member dashboards. This will provide members

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with clearer visibility of audit outcomes, outstanding actions and compliance performance, while strengthening consistency and oversight across the programme.

Importantly, the modernisation is both grounded in today's regulatory requirements and designed with the future regulatory environment in mind. The framework reflects the international move towards risk- and outcome-based feed regulation, preventive controls and greater facility accountability, while also aligning with the direction of the proposed Feeds and Pet Food Bill. This should help members progressively prepare for future requirements, including the proposed move towards facility licensing and preventive controls.

AFMA's focus during the coming period will be to finalise and validate the audit framework and scoring methodology, undertake further pilot audits, configure the electronic system, strengthen auditor training and calibration, finalise supporting governance and audit documentation, and prepare members for implementation. Appropriate existing certifications will be recognised where possible to minimise unnecessary audit duplication.

In the longer term, AFMA will explore the potential for the CoC to develop into a formally recognised industry certification scheme, strengthening member

credibility and potentially supporting future facility licensing and risk-based regulatory recognition. Ultimately, the modernised CoC aims to provide a practical bridge between current legislative compliance, global good practice and South Africa's future feed regulatory framework, while continuing to give practical effect to Safe Feed for Safe Food.

5.2.2 AFMA Transport Protocol

The AFMA Transport Protocol continues to complement the AFMA Code of Conduct by extending feed-safety and risk-management principles into the transport of raw materials and feed ingredients. Introduced in 2017, the voluntary protocol provides practical, risk-based requirements for safe and hygienic road transport, including vehicle suitability, previous-load controls and appropriate cleaning regimes to minimise contamination and cross-contamination risks.



The Protocol recognises that feed integrity must be maintained throughout the supply chain, from collection and transport through to delivery at the feed manufacturing facility. Validated transport

providers demonstrate their commitment to responsible transport practices and contribute to greater confidence in the safe movement of feed materials.

As of 2024/2025, eight transporters remain compliant with the AFMA Transport Protocol and hold a current valid audit status, excluding transporters that have not renewed their audits. Compliant transporters are listed on the AFMA website and may display the AFMA logo as a mark of their commitment to responsible transport practices and the safe, hygienic movement of feed materials within the feed supply chain.

 [Compliant transporters list](#)

5.2.3 AFMA Early Warning System (EWS)

AFMA's Early Warning System (EWS), introduced in 2009, remains a proactive industry mechanism for the early identification and communication of potential feed-safety and feed-integrity risks associated with raw materials and feed products. The system enables members to confidentially report credible concerns, supporting timely industry awareness and response where required. Although the EWS was not formally activated during 2025/26, it remains an important safeguard within AFMA's broader self-regulatory framework and commitment to Safe Feed for Safe Food. 



6. Training and Skills Development Committee Matters

6.1 Strategic Focus Areas

6.1.1 AFMA-Endorsed Feed Mill Operator Blended Learning Programme

The **Feed Mill Operator (FMO) Blended Learning Programme** remains a strategic skills development initiative aimed at strengthening operator competence within the animal feed manufacturing industry. The programme combines structured theoretical learning with supervised workplace-based training, enabling learners to develop practical competence within their own feed-mill environment while limiting disruption to normal production activities. Key learning areas include feed manufacturing processes, raw-material handling, quality assurance, occupational health and safety, equipment operation, process control and regulatory compliance.



During the year, AFMA also continued to strengthen the programme content. Outdated material was identified in Chapter 1, which was subsequently revised, adopted and implemented. The revised content strengthened the introductory industry context and incorporated relevant elements of the AFMA Code of Conduct and applicable legislation.

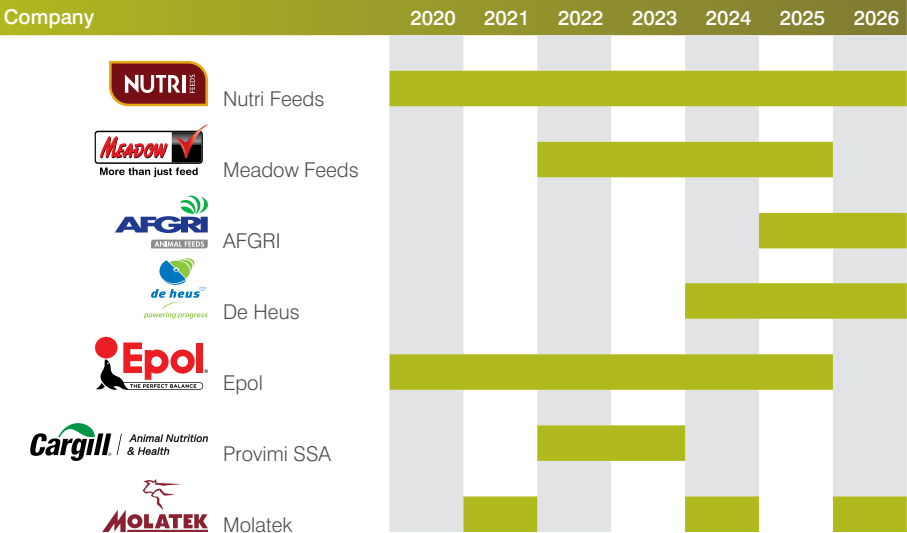
The curriculum equips learners with the knowledge and practical competencies required to operate confidently and competently at operator level, contributing to improved production efficiency, product quality and workplace safety.

A key strength of the programme is its integration of theoretical learning with practical workplace application. Learners remain actively involved in normal feed-mill operations while completing their training, allowing skills development to take place with minimal disruption to operational productivity.

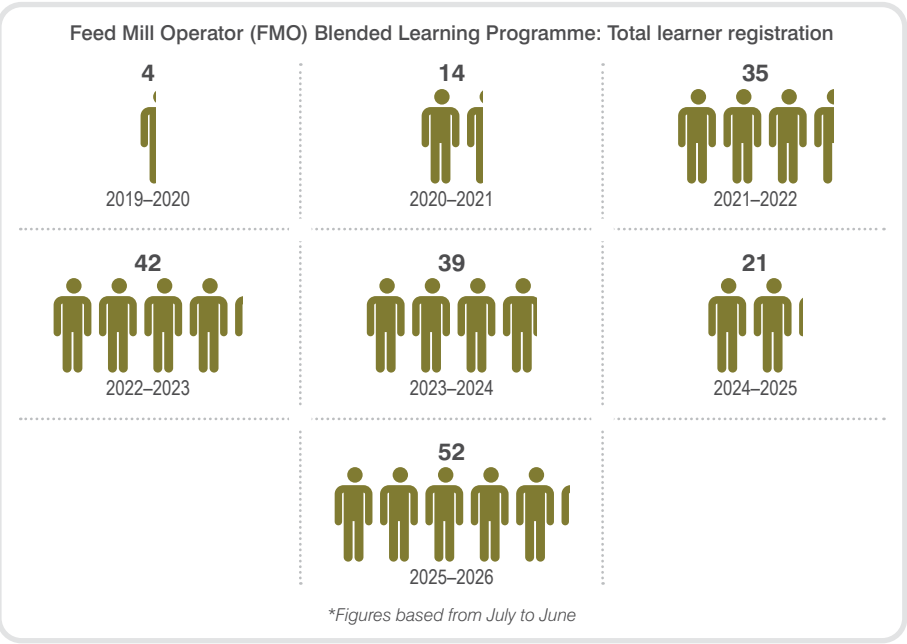
During 2025/26, 52 learners registered for the programme, compared with 21 in 2024/25, reflecting strong industry uptake.

AFMA remains committed to promoting the programme across the industry and encouraging broader participation as part of the sector's long-term skills development strategy. The growing uptake of learners reflects continued industry recognition of the programme's value in developing a skilled and sustainable workforce. The number of learners enrolled in the programme is presented in the table in the next column.

FMO participation by company (2020–2026)



* The companies listed enrolled three or more learners in the respective year.





Member feedback and programme impact

Feedback from participating AFMA members during the reporting period provided encouraging evidence of the programme's practical value. Companies reported that trained employees developed a broader understanding of feed mill processes, greater confidence in carrying out their responsibilities, stronger feed safety and quality awareness, and improved ability to identify and communicate operational deviations. Some members also reported fewer internal errors, improved efficiency and increased employee ownership, while the programme is increasingly being used to identify and develop employees with potential for future supervisory roles.

6.1.2 Student opportunities and outreach

AFMA remains committed to strengthening the future skills pipeline of the animal feed industry through

student outreach initiatives. These engagements aim to create meaningful interaction between students, universities and experienced industry professionals, with AFMA members serving as ambassadors for the animal feed sector.

During 2026, AFMA expanded its student outreach activities by hosting three initiatives in collaboration with selected member companies and universities. The programme involved students from North-West University, the University of Venda and the University of Limpopo, with industry engagements hosted at De Heus feed mills in Klerksdorp and Modimolle, as well as at Kemin Industries in Pretoria.

A total of 118 students participated in the programme, comprising 27 students from North-West University, 33 from the University of Venda and 58 from the University of Limpopo.

Through technical presentations, professional development sessions and guided plant tours, students gained practical insight into feed manufacturing processes, raw-material handling, quality control, feed safety, logistics and technical support functions. They also engaged directly with industry professionals, including plant managers, production personnel, technical advisors, safety officers and raw-material specialists.

Professional readiness formed an important part of the programme. Representatives from the South African Council for Natural Scientific Professions (SACNASP) provided guidance on professional registration and career development, while AgriJob shared practical advice on CV preparation, interview skills and entering the professional working environment.



Feedback from participating students was positive, particularly regarding the value of site visits and direct exposure to feed manufacturing facilities. These initiatives help strengthen the connection between academic learning and industry practice, increase awareness of career opportunities within the animal feed sector and contribute to developing the future skills pipeline of the industry.

6.2 Other Training & Skills Development Matters

6.2.1 Act 36 of 1947 in practice workshop

A sound understanding of the Fertilizers, Farm Feeds, Agricultural Remedies and Stock Remedies Act, 1947 (Act 36 of 1947) is fundamental to ensuring regulatory compliance, maintaining product integrity, and supporting best practice within South Africa's agricultural inputs sector. Given the complexity of the legislation and the practical challenges associated with its interpretation and implementation, AFMA identified the need to provide industry members with practical guidance through a dedicated training workshop.

AFMA hosted the Act 36 of 1947 in Practice Workshop on 12–13 February 2026, for the second time. The workshop was presented by Mr Herman van Zyl, a highly regarded industry expert with more than 45 years of experience in the interpretation, implementation, and practical application of Act 36 of 1947. Drawing on decades of regulatory and industry experience, Mr Van Zyl provided participants with valuable insights into the legislative framework, compliance requirements, and the practical implications of the Act for feed manufacturers and other stakeholders operating within the agricultural inputs industry.

The workshop generated exceptional interest across the industry, with all 21 available seats in the AFMA Boardroom being reserved within hours of registrations opening. The strong response demonstrated the industry's demand for high-quality, practical training on regulatory matters and highlighted the importance of continuous professional development in this area.

Participant feedback was overwhelmingly positive, with attendees commending the practical nature of the programme, the relevance of the topics covered, and the opportunity to engage directly with an acknowledged subject matter expert. Due to the significant level of interest, a waiting list was established for prospective delegates who were unable to secure a place.

Following strong member demand, AFMA will continue offering the programme every six months to support ongoing regulatory compliance.

6.2.2 Act 36 of 1947 Farm Feed registration workshop

AFMA hosted a reinvented Act 36 Farm Feed Registration Workshop on 26 March 2026 at Irene Country Club, focusing on the practical requirements for the registration of premixtures and feed additives under the Farm Feeds and Agricultural Stock Remedies Act, 1947 (Act 36 of 1947).

The workshop was designed to provide greater clarity on the registration process, strengthen the quality of submissions and address common challenges experienced by applicants.

Discussions highlighted recurring issues that can contribute to delays, including payment and service request errors, incomplete or incorrect documentation, outdated templates, poorly structured applications, inconsistent product information, label non-compliance, technical and analytical gaps, incorrect product classification and insufficient scientific supporting data.

Emphasis was placed on the importance of ensuring that submissions are complete, accurate and aligned with current local regulatory requirements. The workshop also highlighted that international approvals or information cannot simply be relied upon without ensuring compliance with applicable South African requirements.

The importance of timely responses to queries from the Registrar was another key focus. Prompt responses enable applications to be considered in

the next available assessment cycle, whereas delays can interrupt the review process, increase turnaround times and, in some cases, require applications to be re-evaluated after an extended period.

The workshop provided participants with practical insight into the registration process and the factors that can influence the efficient assessment and finalisation of applications. By addressing common challenges and promoting better-quality submissions, AFMA continues to support its members in navigating the regulatory requirements applicable to the animal feed industry.



From left to right: Mr Jonathan Mdzunga, Ms Liesl Breytenbach, Dr Cebisa Kumanda, Ms Elelwani Rathogwa, Ms Sonto Mlambo, Mr Simthembele Ngambu & Ms Bonita Cilliers.

6.2.3 AFMA Feed Miller Short Course

During the year, AFMA focused on securing the future continuity and further development of the Feed Miller Short Course following the final presentation by long-standing course facilitator Mr Ernst Nef in 2025.

Following engagement with potential international expertise, Mr Frédéric Mauny was identified to lead the next phase of the programme. Work commenced during the reporting period to reposition the course as the Advanced Feed Milling Technology Course, while retaining the strong technical foundation on which the programme has been built.

The redevelopment aims to modernise the learning experience through a more interactive training approach, supported by updated educational material and practical learning methods relevant to modern feed manufacturing environments.

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Detailed planning and development discussions were progressed during the year in preparation for the next presentation of the course.

The renewed course is planned for the first semester of 2027 and will continue to be presented on a biennial basis.

6.2.4 Career opportunities – platform

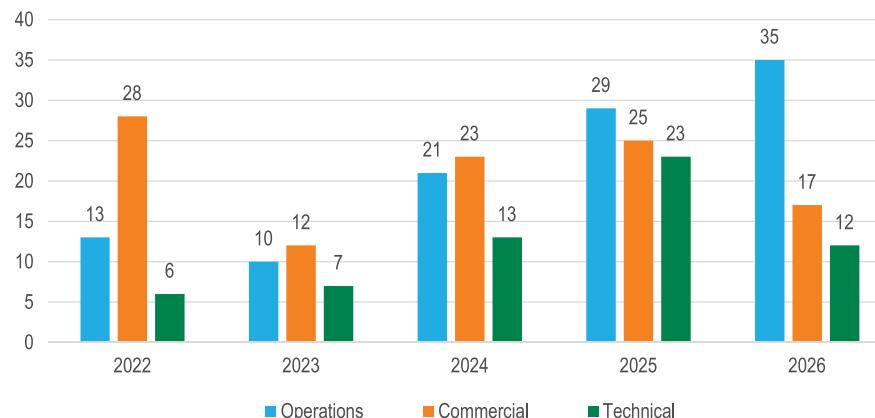
AFMA's collaboration with AgriJob continues to provide an important link between member companies and prospective employees, while increasing the visibility of career opportunities within the animal feed industry. Through the platform, AFMA members are able to advertise vacancies, internships and holiday work opportunities, supporting both industry recruitment and the development of the sector's future talent pipeline.

Between November 2025 and June 2026, 62 AFMA-related job advertisements were posted on AgriJob, with 15 companies making use of the platform during the period. Several companies advertised more than one position, reflecting continued industry use of AgriJob as a recruitment channel.

Vacancy trends also provide useful insight into the skills being sought across the animal feed and related animal industries. From January to June 2026, 64 positions were advertised, of which 35 (55%) were operational, 17 (27%) commercial and 12 (19%) technical. This indicates that the strongest recruitment demand was for operational skills, covering roles in feed mill and production management, logistics, quality assurance, safety and related functions. Commercial vacancies included technical sales, marketing, key account and management positions, while technical vacancies included nutrition and technical support roles.

Beyond vacancy advertising, AgriJob also supported AFMA's broader career-development initiatives. As part of the 2026 Student Outreach Programme, students received practical guidance on CV preparation, interview skills and transitioning into the professional working environment.

Animal industry job advertisements by category: January 2022 – June 2026



Operations: Operations and feed mill management, logistics, millwright, SHEQ, QA/QC, raw materials controller, feedlot, farm and broiler management.

Commercial: Technical sales, marketing, key account management, product management, CEO/GM, financial management and administration.

Technical: Nutritionist, technical service and technical support roles, excluding sales-related positions.

Going forward, greater emphasis will be placed on measuring recruitment outcomes. AgriJob will strengthen follow-up with participating companies to determine whether advertised positions were successfully filled and to provide improved insight into recruitment trends and potential skills shortages within the sector.

6.3 AFMA Awards

6.3.1 AFMA Intersivity Writer's Cup (IWC)

Launched in 2017, the AFMA Intersivity Writer's Cup promotes excellence in scientific and technical writing among undergraduate and postgraduate animal nutrition students. The competition provides students with an opportunity to research, analyse and communicate relevant industry topics while developing critical thinking and professional writing skills.

During the reporting period, the competition continued to attract participation from universities across South Africa and provided a platform for students to engage with contemporary issues relevant to the animal feed and animal nutrition sectors. The judging process also drew on industry participation, strengthening the link between academic work and practical industry relevance.

The 2025 competition concluded during the reporting period, with **Cherise Basson of Stellenbosch University** recognised as the overall winner. **Stellenbosch University** also secured the Intersivity Writer's Cup for a third consecutive year.



The 2026 competition also progressed during the reporting period, with entries received across the different rounds and continued industry participation in the judging process.

 List of previous recipients of the **AFMA Intersivity Writer's Cup**

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6.3.2 SASAS Student Nutrition Poster Award

AFMA continued its support of the AFMA Student Nutrition Poster Award during the 2025 SASAS Congress hosted at the University of Limpopo. The award recognises outstanding Animal Nutrition graduates who demonstrate excellence in communicating nutritional knowledge through a scientific poster presentation at the annual SASAS Congress.

Following evaluation of the eligible submissions by the appointed judging panel, **no award was made for 2025**, as the submissions did not sufficiently meet the required standard and evaluation criteria. The decision reflected AFMA's commitment to maintaining the credibility and standard of the award.

6.3.3 AFMA Student of the Year

The AFMA Student of the Year Award recognises outstanding graduate and postgraduate students who demonstrate academic excellence, a commitment to animal nutrition and the potential to contribute meaningfully to the animal feed and animal production industries. The award also honours the legacy of Dr Koos van der Merwe and his contribution to the development of South Africa's animal feed industry.

During the reporting period, nine nominations representing five South African universities were received for the award. At the 2025 AFMA Annual General Meeting, held on 5 September 2025, **Elzané Liebenberg** of the **University of the Free State** was announced as the 2025 AFMA Student of the Year.

Elzané was recognised for her research investigating the effect of genetically modified maize grain on the gut health and microbial diversity of finishing lambs. Her work contributes to a better understanding of nutrient utilisation, the potential role of GM maize as



a feed ingredient and its relationship with gut health and livestock production efficiency.

 List of previous recipients of the **AFMA Student of the Year Award**

6.3.4 AFMA Technical Person of the Year

The AFMA Technical Person of the Year Award honours the legacy of Dr Barney van Niekerk and recognises individuals who have made an outstanding technical contribution to South Africa's animal feed industry through scientific excellence, innovation, knowledge sharing and industry service.

Following the evaluation of nominations received, **no Technical Person of the Year Award was presented in 2025**, as no nominee sufficiently met the established award criteria. This reflects AFMA's commitment to maintaining the credibility and high standard associated with the award.

6.3.5 AFMA Person of the Year

The AFMA Person of the Year Award is one of the Association's highest honours and recognises an individual who has made an exceptional and measurable contribution to the South African animal feed or feed-related industry. The award acknowledges leadership, innovation, technical expertise and service that have had a significant and lasting impact on the industry.



The 2025 award attracted four nominations, reflecting the high calibre of individuals contributing to the sector. On 5 September 2025, **Wiana Louw** of the **Southern African Grain Laboratory (SAGL)** was named the 2025 AFMA Person of the Year.

Wiana was recognised for more than three decades of contribution to feed safety, food safety and regulatory science in South Africa. Through her work at Roodeplaat Research Laboratories, SABS, CSIR and SAGL, she contributed to the development and validation of analytical methods, national residue monitoring, internationally recognised laboratory accreditation and the strengthening of South Africa's scientific and regulatory capacity.

Her contribution to the grain and animal feed industries has extended beyond laboratory science to industry leadership and collaboration. She established the National Mycotoxin Monitoring Programme and SAGL's Crop Protection Division, while her involvement in AFMA and other agricultural industry structures has supported the development of scientific information used in standards, policy and regulatory decision-making. Her commitment to mentoring young scientists, supporting research and strengthening collaboration between industry, academia and government further reflects the lasting contribution for which the award recognises her. 

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7. Marketing and Promotion Committee Matters

7.1 Events

7.1.1 Annual General Meeting

AFMA's 2025 Annual General Meeting, held on 5 September 2025, brought members together to reflect on developments affecting the agricultural and animal feed sectors and to consider the challenges and opportunities ahead.

The programme featured valuable perspectives on issues relevant to the industry. Dr Tracy Davids, Director and Manager of Commodity Markets & Foresight at the Bureau for Food and Agricultural Policy (BFAP), presented an overview of South Africa's agricultural outlook, focusing on production trends, global competitiveness and the expected impact of changing economic conditions.

A soybean market panel, led by Prof Ferdi Meyer, Managing Director of BFAP, and featuring Dr Erhard Briedenhann, Founder and CEO of Management Investment and Distribution Services (MIDS); Peter Lovelace, Chief Executive Officer of Central Edible Oils (Pty) Ltd (CEOCO); Anina Hunter, Managing Director of Epol Feed and Chairperson of AFMA; and Kellie Becker, Managing Director of Southern Oil (Pty) Ltd, explored supply and demand trends, processing capacity, pricing pressures and opportunities for growth within the local value chain.

Ian Bird, Senior Executive at Business Unity South

Africa (BUSA), addressed South Africa's logistics sector, highlighting the importance of policy stability, infrastructure investment and collaborative industry engagement to support long-term reliability. The AGM provided members with an opportunity to engage with these important industry developments, exchange perspectives and consider their implications for the animal feed sector.

AFMA thanks all members who attended and contributed to a productive and engaging programme, as well as the sponsors whose continued support contributes to the success of AFMA's events and initiatives.



Anina Hunter, Chairperson of AFMA.



Ian Bird, Senior Executive, Business Unity South Africa (BUSA).



Dr Tracy Davids, Director and Manager of Commodity Markets & Foresight, BFAP



Left to right: Prof Ferdi Meyer, Managing Director, BFAP; Kellie Becker, Managing Director, Southern Oil (Pty) Ltd; Anina Hunter, Chairperson of AFMA; Peter Lovelace, Chief Executive Officer, Central Edible Oils (Pty) Ltd (CEOCO); and Dr Erhard Briedenhann, Founder and CEO, Management Investment and Distribution Services (MIDS).

With appreciation to our 2025 AGM sponsors:



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7.1.2 AFMA 80th Anniversary Gala Dinner

AFMA celebrated a significant milestone in 2025 with a special **80th Anniversary Gala Dinner**, bringing members and industry stakeholders together to recognise eight decades of the organisation's contribution to the animal feed industry.

The evening provided an opportunity to reflect on AFMA's history and to recognise the leaders who have guided the organisation through important periods of its development and helped shape the industry over the years.

Previous AFMA Chairpersons were recognised for their contribution to the organisation:

- **Gerhard Scholtemeijer** (1977–1983)
- **Dr Erhard Briedenhann** (2002–2005 and 2007–2010)
- **Dr Hinner Köster** (2005–2007)
- **Loutjie Dunn** (2010–2018)
- **Wouter de Wet** (2018–2022)
- **Anina Hunter** (2022–present)

The evening also recognised AFMA's Executive Directors, including **Hansie Bekker** (1990–2006), **De Wet Boshoff** (2006–2022) and **Liesl Breytenbach** (2023–present), acknowledging the leadership and continuity provided at executive level.

The 80th Anniversary Gala Dinner was a fitting celebration of AFMA's history and an opportunity to acknowledge the people who have contributed to building the organisation and the industry it represents today.



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7.1.3 AFMA Media & Industry Day

AFMA hosted its second Media & Industry Day on 28 May 2026 in Pretoria, bringing together media representatives, AFMA members and industry stakeholders to strengthen engagement and provide greater insight into the animal feed industry and its role within the broader agricultural value chain.

Discussions highlighted the growing interconnection between the feed and food chains and the role of the formal feed industry in supporting food security, animal health and consumer confidence. A key focus was industry assurance, including AFMA's work to strengthen its Code of Conduct through a more risk-based approach, improved traceability, electronic auditing and enhanced reporting.

Thea Laufs, Director of CPG, provided insight into how modern assurance systems can support regulatory efficiency and industry responsiveness, while Karla Zietsman, General Manager of SAPPO, shared Pork 360 as a practical example of industry-led assurance in action.

A key message from the day was that effective assurance depends not only on standards and systems, but also on the skills, implementation capacity and collaboration required to apply them effectively across the value chain.

The event provided AFMA with an important platform to engage directly with the media and industry stakeholders, strengthen understanding of the feed industry and highlight its role within the broader food production system.



Left to right: Petru Fourie, Operations Manager, AFMA; Thea Laufs, Director of CPG; Dr Lucius Phaleng, Trade Advisor, AFMA; Karla Zietsman, General Manager, SAPPO; and Liesl Breytenbach, Executive Director, AFMA.



7.1.4 AFMA Golf Day

The annual AFMA Golf Day took place on 5 August 2026 at Centurion Country Club in Pretoria, bringing together members and industry partners for a day of networking and friendly competition.



The event welcomed 140 players representing 32 sponsor companies, highlighting the strong support of AFMA's members and partners for this annual industry event. The Golf Day also incorporated a Women's Month theme, providing an opportunity to recognise and celebrate the contribution of women within the agricultural and broader industry.

A special feature of the day was the "Beat the Pro" initiative, with professional golfer Shawnelle de Lange

joining participants on the course. The initiative added an engaging competitive element to the day and provided players with an opportunity to test their skills alongside a professional golfer.

The day concluded with a prize-giving dinner attended by 198 guests, providing an opportunity to acknowledge the achievements of participants and thank the sponsors and partners whose support contributed to the success of the event.

The AFMA Golf Day continues to provide an important platform for members, sponsors and industry colleagues to connect outside the formal business environment, while strengthening relationships and supporting engagement across the industry.

7.2 Digital Communications

7.2.1 AFMA website

AFMA launched its redesigned website during the reporting period, providing members and industry stakeholders with a more modern and accessible platform for industry information and services. The upgraded website includes a secure member area, improved navigation and functionality, and integrated Power BI dashboards providing access to feed production and raw-material statistics.

The platform also provides greater visibility of AFMA's role across the feed-to-food value chain and improved access to Association initiatives, publications, member information and industry resources. The website will continue to be developed as an important platform for strengthening member communication, access to information and AFMA's digital service offering.

7.2.2 Event microsites

AFMA continued to strengthen its digital presence through dedicated microsites for key events and initiatives. These platforms provide members, delegates, sponsors and other stakeholders with a central source of information, including event details, programmes, registration information and other relevant resources.

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Dedicated microsites were maintained for the AFMA AGM, AFMA Symposium, AFMA Forum, AFMA Technical Writing Skills Workshop and AFMA Golf Day:

- **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

The use of dedicated event platforms supports AFMA's broader communication efforts and provides a consistent and accessible way for stakeholders to access information relating to AFMA's events and activities.

7.2.3 Social media and digital communication

AFMA continued to use its social media platforms as an important channel for communicating with members and stakeholders and increasing awareness of the Association and the broader animal feed industry.

Throughout the year, AFMA shared information relating to industry developments, regulatory and technical matters, training and skills development, student initiatives, events, member activities and other relevant Association news. Social media also provided a platform for highlighting AFMA's work and keeping stakeholders informed of opportunities to participate in the Association's programmes and initiatives.

The Association's social media activity complemented its newsletters, website and other digital communication channels, providing regular and accessible communication with the industry.

AFMA will continue to develop its digital communication channels to strengthen engagement with members and stakeholders and to increase awareness of the Association's role and activities within the animal feed industry.



7.2.4 AFMA Newsletter

AFMA continued to use its newsletter as an important communication channel to keep members and industry stakeholders informed of developments within the Association and the broader animal feed industry.

The newsletters provided updates on AFMA initiatives, industry developments, regulatory matters, training opportunities, student engagement, upcoming events and other relevant information for members and stakeholders. They also provided a platform for sharing news and activities from across AFMA and highlighting opportunities for industry participation.

The newsletter complements AFMA's website, social media platforms and other communication channels, helping to ensure that members remain informed and

connected to the Association's activities and the wider industry.

AFMA will continue to develop its communication channels to provide members with relevant, timely and useful information.



Previous editions of the **AFMA Newsletter**

7.3 Print Media

7.3.1 AFMA Matrix

The **AFMA Matrix** continued to serve as an important communication and knowledge-sharing platform for the Association and the broader animal feed industry. The publication provides an opportunity to share industry developments, technical and scientific information, AFMA initiatives and perspectives from industry stakeholders.

During the reporting period, the Matrix featured content covering key developments and activities within the animal feed sector, while also providing a platform for recognising industry contributions and highlighting the work undertaken by AFMA and its members.

A special **80th Anniversary edition of AFMA Matrix** was published in 2025 to commemorate AFMA's eight decades of service to the animal feed industry. The edition reflected on the Association's history and recognised the individuals and milestones that have contributed to its development over the years.

The Matrix complements AFMA's other communication channels, including the newsletter, website and social media platforms, and remains an important resource for sharing information and maintaining engagement across the industry.



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8. AFMA Membership

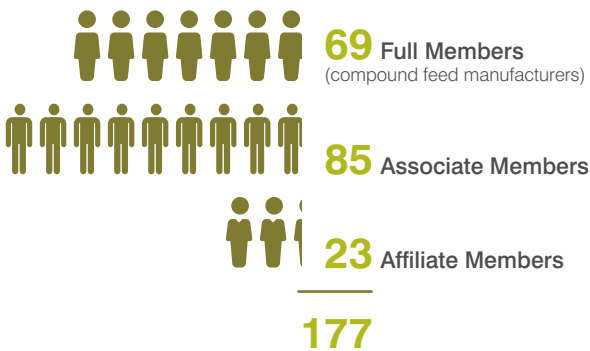
8.1 AFMA Membership Summary

During the reporting period, AFMA received a total of 49 new membership applications, broken down as follows:

- 15 applications for potential Full Membership
- 15 applications for potential Associate Membership
- 19 applications for Affiliate Membership

In the same period, two Affiliate and two Associate Members resigned from AFMA.

As of the 2025/26 financial year, AFMA's total membership stands at 177, comprising:



Breakdown of Associate Membership Categories:



Breakdown of Affiliate Membership Categories:



8.2 New Members

The following new member companies joined AFMA this year, after successfully meeting the compliance requirements of the AFMA Code of Conduct, and have been awarded AFMA Membership certificates:

Full Members



RCL Foods Ltd t/a RCL Foods Sugar and Milling Molatek-Pongola



Ubuntu Trans Logistics



Suthile Animal Feeds



Molare
Nourishing Humanity

SIS Molare Feedlot



Molare
Nourishing Humanity

Rockdale Molare Feedlot



Associate Members



Phibro Animal Health



PUREFERT

Purefert South Africa



Essential Quality Premix



Orchem



Revo Feeds



DH Brothers Industries t/a
Willowton Group Quality Road, Isando

dsm-firmenich ●●● Animal Nutrition and Health South Africa



Biochem South-East Africa

Affiliate Members



Credeq Africa



Andritz Delkor



Bessemer Africa



Anton Paar South Africa

The following members reported name changes during this period:

- Feed First changed to Feed Hub
- dsm-firmenich to Animal Nutrition and Health South Africa

8.3 Membership Renewals

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

- 49 renewal applications were received
- 44 members were confirmed compliant
- 5 renewal applications are currently being processed

The complete AFMA Membership Lists, including the Code of Conduct compliance status of Full and Associate Members, are available on the AFMA website.



[AFMA Membership List](#)

Additionally, **ten (10)** transport companies participated in the AFMA Transport Protocol Audit during the reporting period.



List of [Approved Transporters](#)



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9. AFMA Organisational Structure

9.1 Board of Directors



Back row (from left to right): Mr Ruan Stander (Meadow Feeds), Mr Paul Saunders (Sovereign Foods), Mr Brett Roosendaal (Epol), Mr Dieter Fleischmann (AFGRI Animal Feeds), Mr Francois du Toit (NOVA Feeds), Dr Francois Crots (Country Bird Holdings) and Mr Martin Oosthuizen (De Heus).

Front row (from left to right): Mr Michael Schmitz (Meadow Feeds), Mrs Anina Hunter (Epol; Chairperson), Mr Thinus van Lill (NOVA Feeds; Vice-Chairperson) and Mrs Liesl Breytenbach, (AFMA; Executive Director).

Absent: Dr Josef van Wyngaard (Voermol)

9.2 AFMA Committees

AFMA's five committees provide the principal structure through which members can participate in addressing matters of importance to the animal feed industry. Led by Chairpersons and Vice-Chairpersons nominated and elected by members, the committees play an integral role in advancing AFMA's strategic priorities and projects. Their work is supported by specialised working groups and subcommittees responsible for specific initiatives that contribute to AFMA's broader strategic objectives.

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 Marjorie Potgieter
(Cargill)

Administrator: Ms Bonita Cilliers

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Regulatory Committee



Chairperson:
Ms Liza Burger
(Epol)



Vice-Chairperson:
Ms Nikki Moodley
(Meadow Feeds)

Administrator: Ms Bonita Cilliers

Training & Skills Development Committee

Chairperson: Ms Petru Fourie

Administrator: Ms Wimpie Groenewald

Marketing & Promotion Committee

Chairperson: Ms Petru Fourie

Administrator: Ms Benita "Bee" Oelofsen

9.3 Meet our Team

The AFMA team supports the Association's members and delivers the programmes, services and initiatives that underpin AFMA's role as the representative body for the formal animal feed industry.

The team consists of:



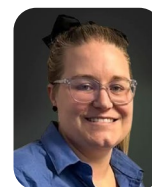
Liesl Breytenbach
Executive Director



Petru Fourie
Operations Manager



Dr Lucius Phaleng
Trade Advisor



Bonita Cilliers
Technical &
Regulatory Advisor



Cilé-Mari Bredenkamp
Technical Intern



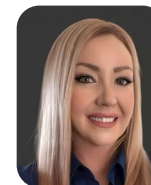
Bee Oelofsen
Marketing & Events
Coordinator



**Mandy Jansen
van Vuuren**
Finance Officer



Wimpie Groenewald
Member Liaison Officer



Anneli Liebenberg
Office Administrator



10. Acknowledgements

I wish to acknowledge my fellow members of the AFMA Board of Directors for their guidance, support and commitment throughout the year. Their collective leadership remains central to strengthening AFMA's role as an effective and credible representative of the animal feed industry.

My sincere appreciation goes to all AFMA members. Your continued participation, technical expertise and willingness to contribute through AFMA's committees, working groups, events and industry initiatives enable the Association to represent the sector effectively. AFMA's progress and influence depend on the active involvement

and collective voice of its membership.

I also thank the Chairpersons, Vice-Chairpersons and members of AFMA's committees and specialised working groups for their dedication in advancing the Association's strategic priorities. Their contribution is instrumental in addressing industry matters and translating shared objectives into meaningful action.

I further extend AFMA's appreciation to our stakeholders and partners across the agricultural, feed and food value chains, including government departments, regulatory authorities, producer organisations, research

and academic institutions, industry associations and other collaborating organisations. Their engagement and cooperation are essential to addressing shared challenges, strengthening the sector and advancing the interests of the broader value chain.

Finally, I extend my sincere appreciation to AFMA's Executive Director, Liesl Breytenbach, for her leadership and commitment, and to the entire AFMA staff team for their dedication, professionalism and positive spirit. Their collective efforts have been central to AFMA's achievements and the successful implementation of its strategic priorities throughout the year. 



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