

Key Priorities and Focus Areas in The Grain Sector in 2026

Agbiz Media Day

5 December 2025

Dr Charl van der Merwe



AGENDA

- Background regarding Agbiz Grain
- Grain Industry Overview
- Important aspects in 2026
- Current Agbiz Grain projects

SOUTH AFRICAN GRAIN INDUSTRY - STRUCTURES

COMMODITY TRUSTS/NPC

Maize, SAWCIA (Winter Cereals), Oil & Protein, Sorghum

INDUSTRY FORUMS

Maize forum
Wheat forum
Soya beans & Sunflower Forum
Groundnut Forum
Sorghum forum
Canola forum

INDUSTRY ORGANIZATIONS



VALUE CHAIN ASSOCIATIONS



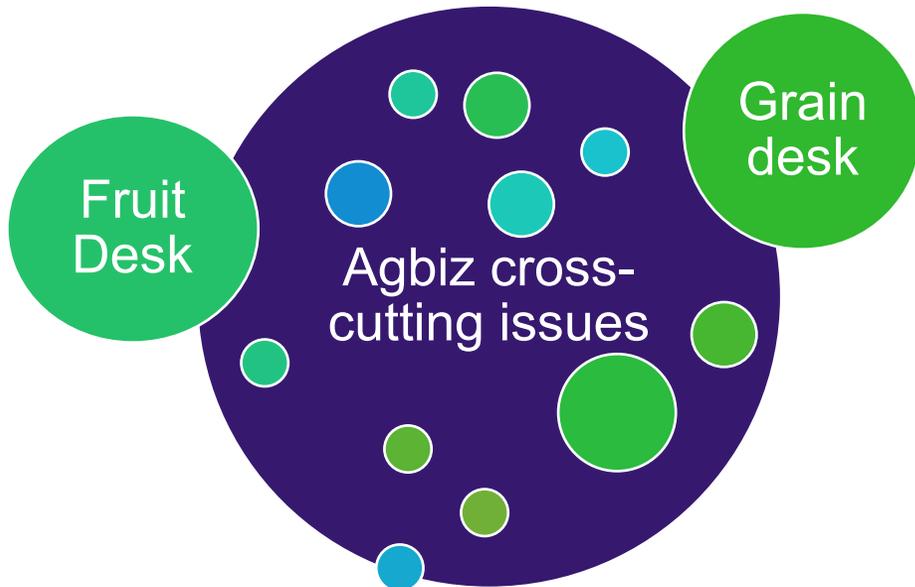
AGRICULTURE AND AGROPROCESSING MASTER PLAN

- Grain Value Chain Round Table
 - Regulation WG
 - Trade WG
 - Transport and Infrastructure WG
 - Research and Technology WG

DEPARTMENT OF AGRICULTURE STRUCTURES

- Crop Estimates Liaison Committee,
- Supply and Demand Liaison Committee
- Food Safety Forum
- Agriculture Trade Forum
- Assignee Committee

AGBIZ GRAIN / AGBIZ



- Focus on policy and regulatory issues in the grain handling and storage sector.
- Representing members at industry forums.
- Operates as a semi-autonomous desk within Agbiz.
 - Dedicate staff.
 - Dedicated ringfenced contributions from members.
 - Advisory Committee provides guidance and support.
- Support from Agbiz regarding
 - Financial management
 - Administration
 - Legal intelligence
 - Research support
 - Policy evaluation and recommendations.

AGBIZ GRAIN MEMBERS

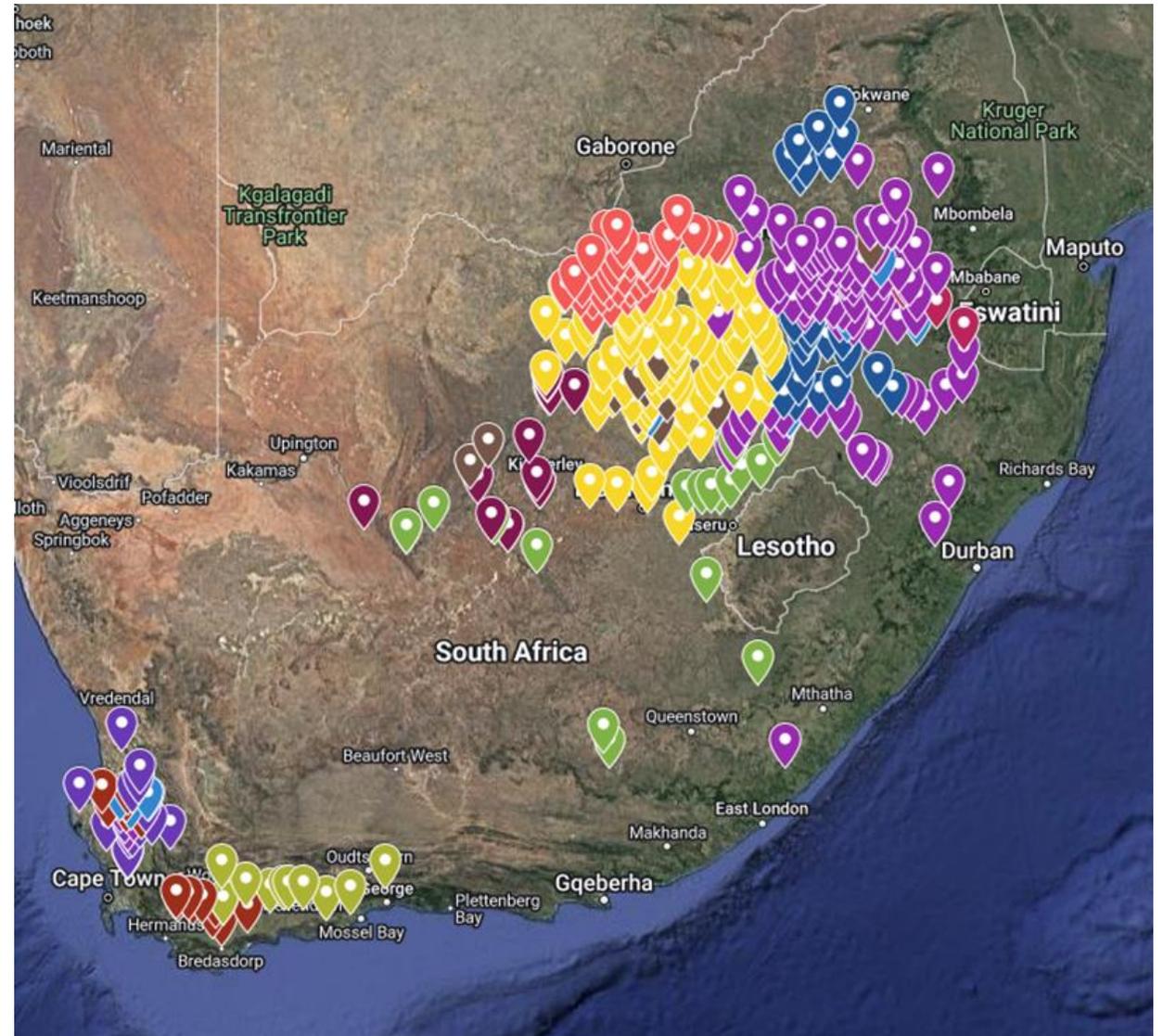


ASSOCIATE MEMBERS



AGBIZ GRAIN MEMBERS

- Our members jointly own 98% of all JSE-registered storage sites.
- Criteria for membership:
 - Commercial handling and storage
 - Silo's + alternative structures
 - > 15 000 ton
 - > 500 tons per day outloading



AGBIZ GRAIN

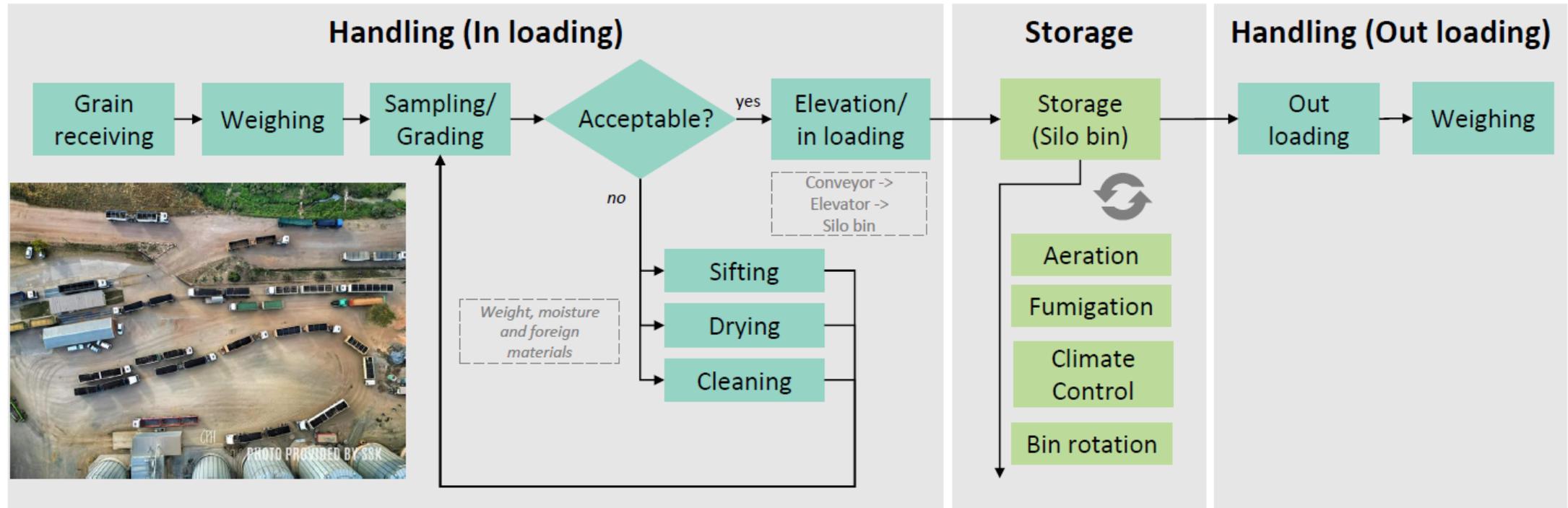


- Agricultural Product Standards Act (Act 119 of 1990)
- Agricultural Marketing Act, 1968 (Act 59 of 1968)
- Fertilizers, Farm Feeds, Seeds and Remedies Act (Act 36 of 1947).
- Foodstuffs, Cosmetics and Disinfectants Act (No. 54 of 1972)
- Various other acts.

AGBIZ GRAIN

Grain silo: Handling and Storage Processes

Traditional concrete/ steel silo

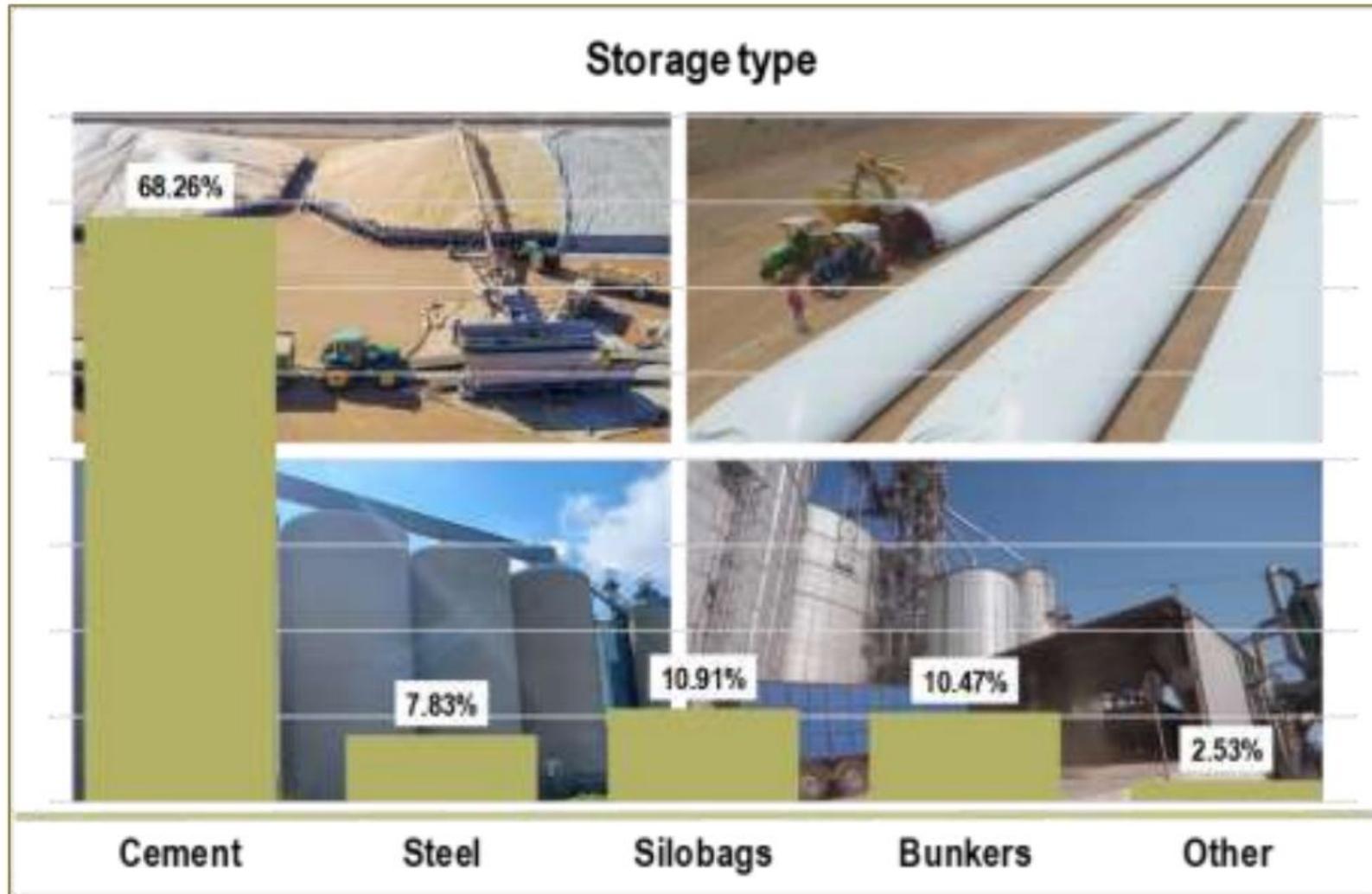


Getting grain within specification and into storage structures

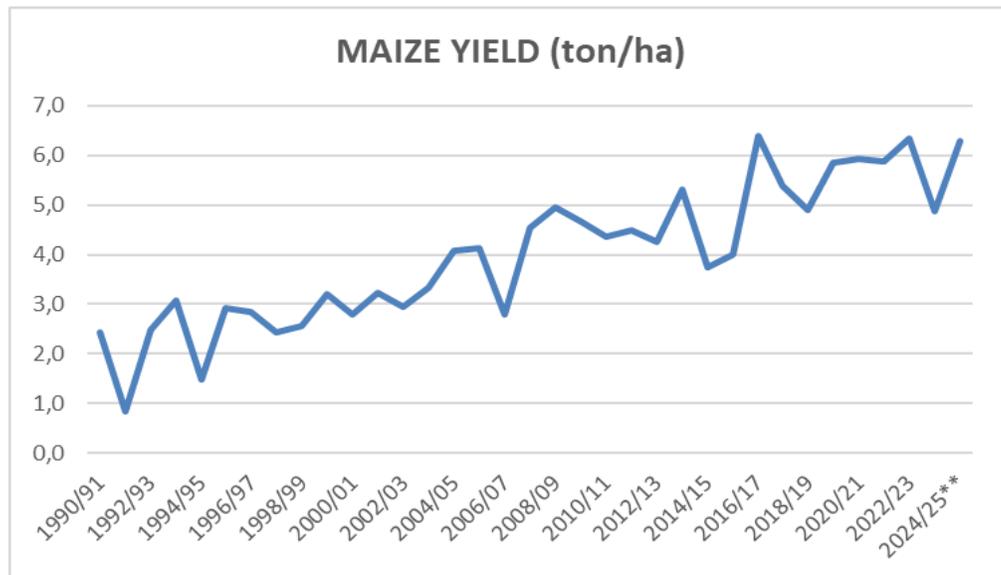
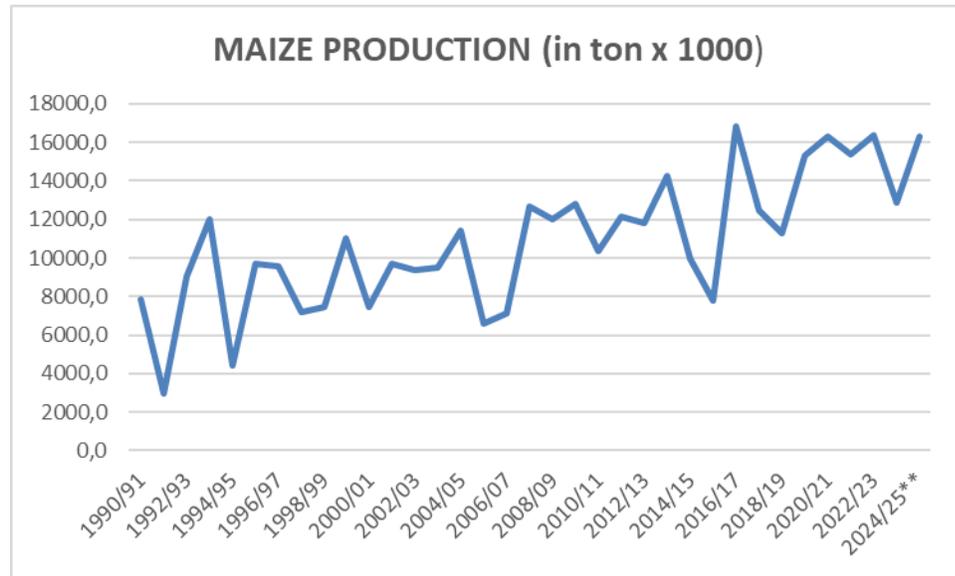
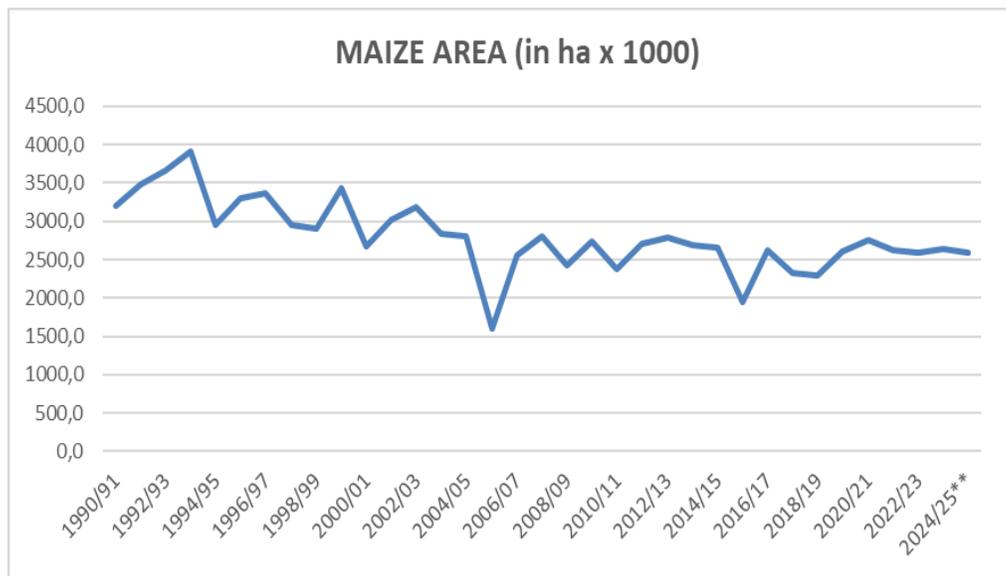
Holding and quality preservation



STRUCTURES USED DURING SAGIS AUDITS



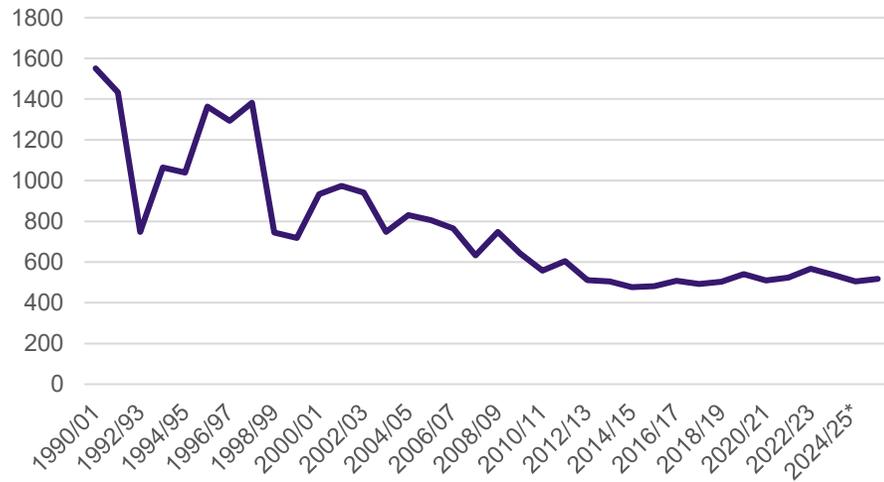
GRAIN INDUSTRY OVERVIEW: MAIZE



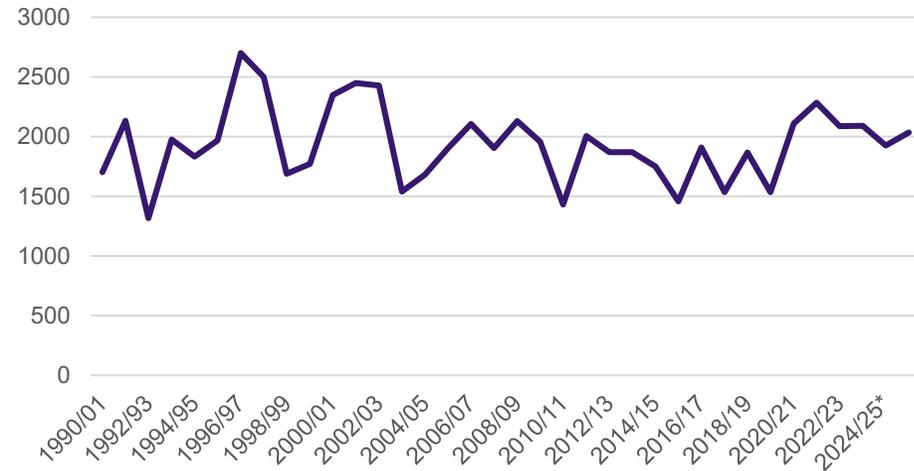
SOURCE: CEC

GRAIN INDUSTRY OVERVIEW: WHEAT

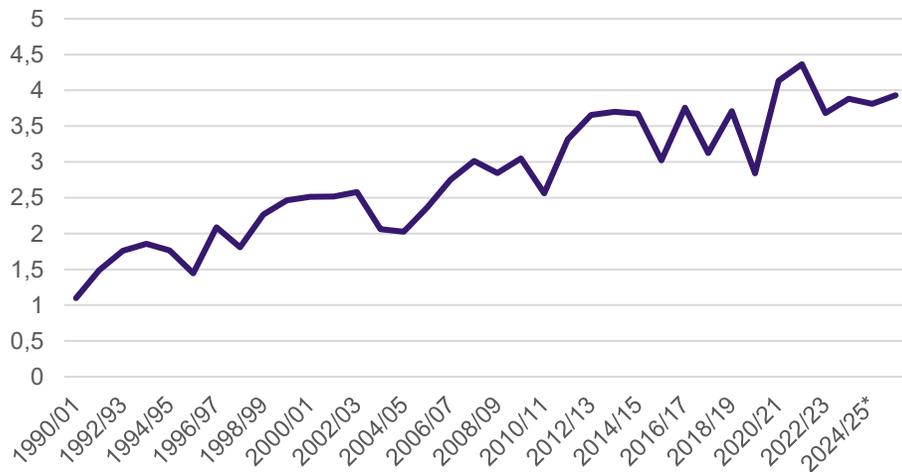
WHEAT AREA (ha x 1 000)



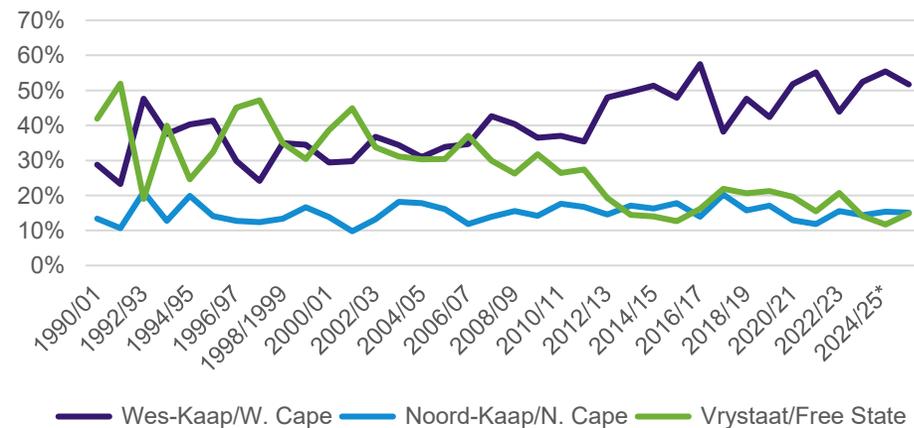
WHEAT: PRODUCTION (in ton x 1000)



WHEAT YIELD (ton/ha)

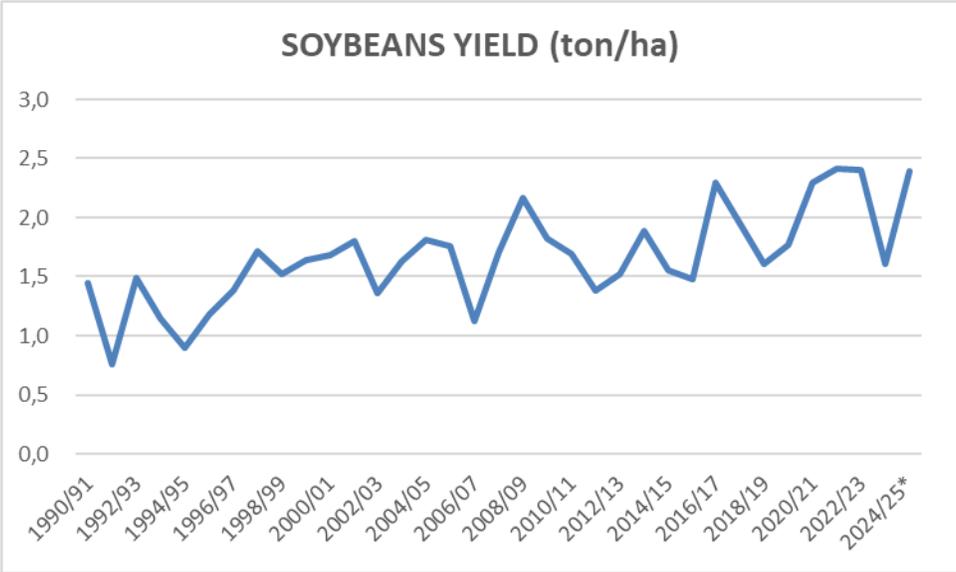
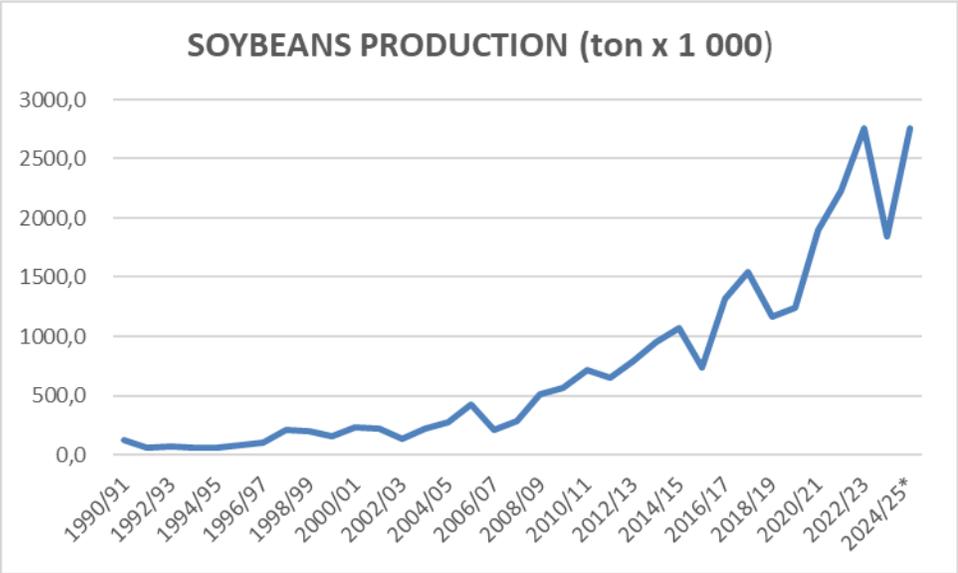
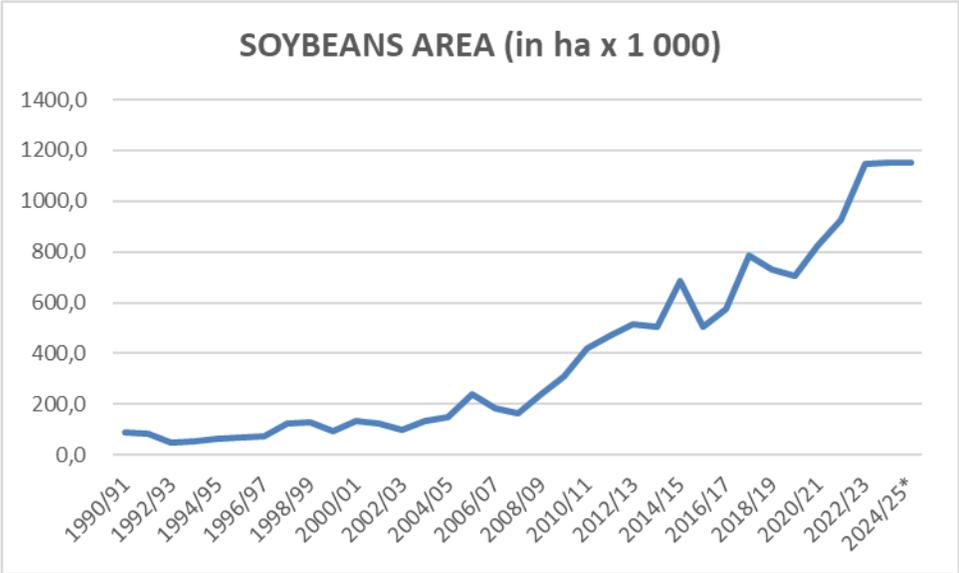


% OF SA WHEAT CROP FOR TOP THREE PROVINCES



— Wes-Kaap/W. Cape — Noord-Kaap/N. Cape — Vrystaat/Free State

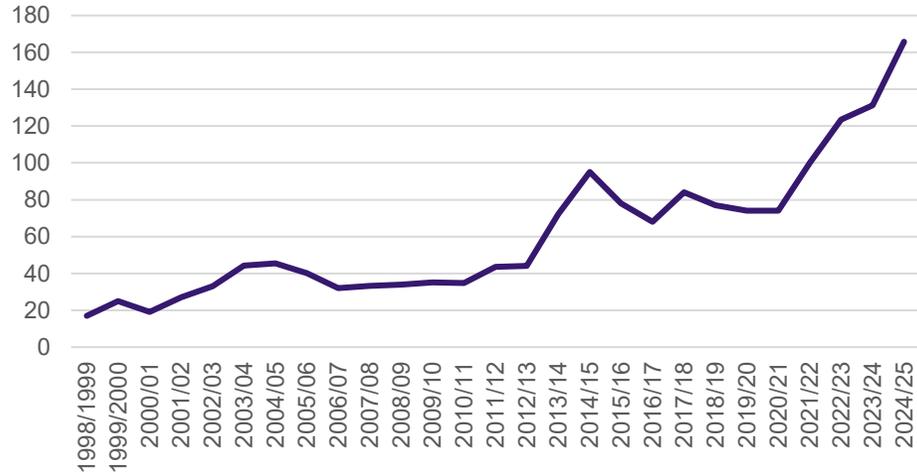
GRAIN INDUSTRY OVERVIEW: SOYBEANS



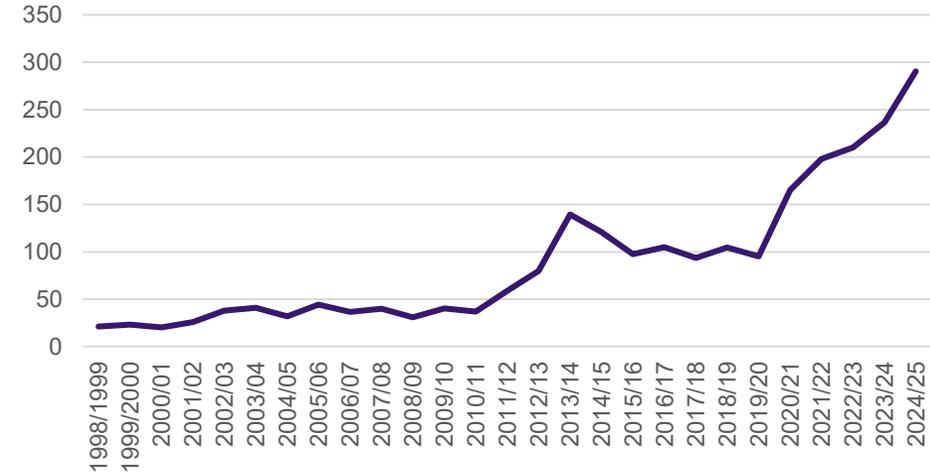
SOURCE: CEC

GRAIN INDUSTRY OVERVIEW: CANOLA

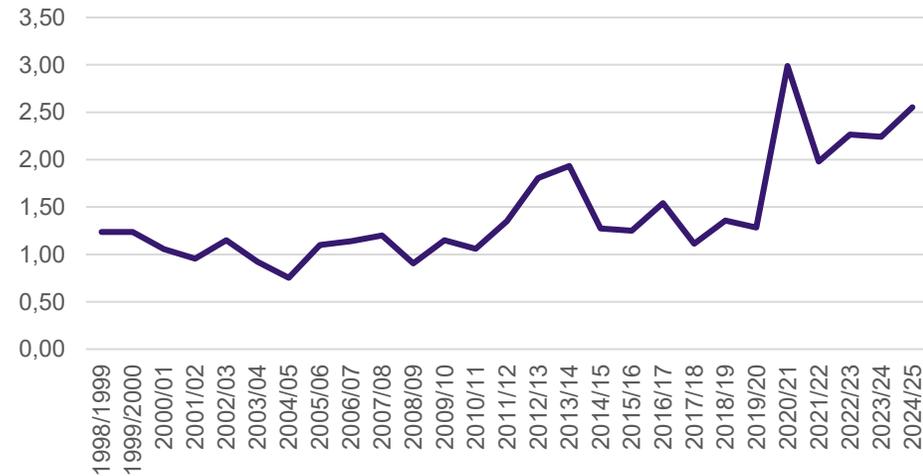
CANOLA AREA (ha x 1 000)



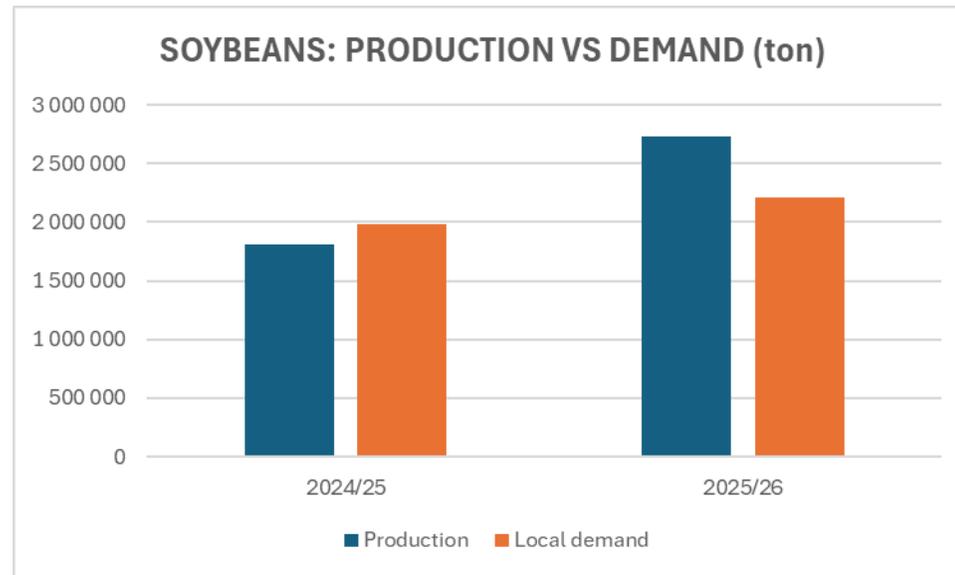
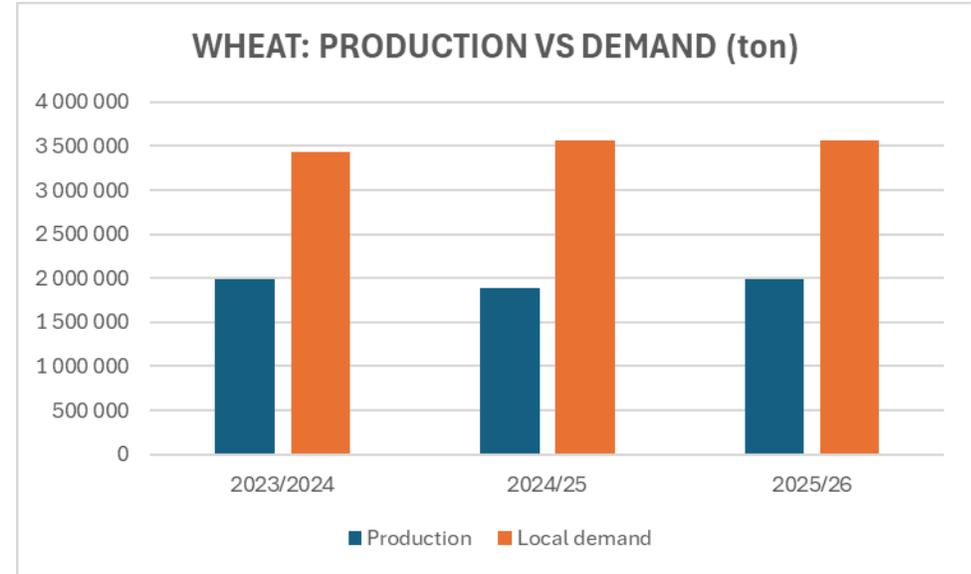
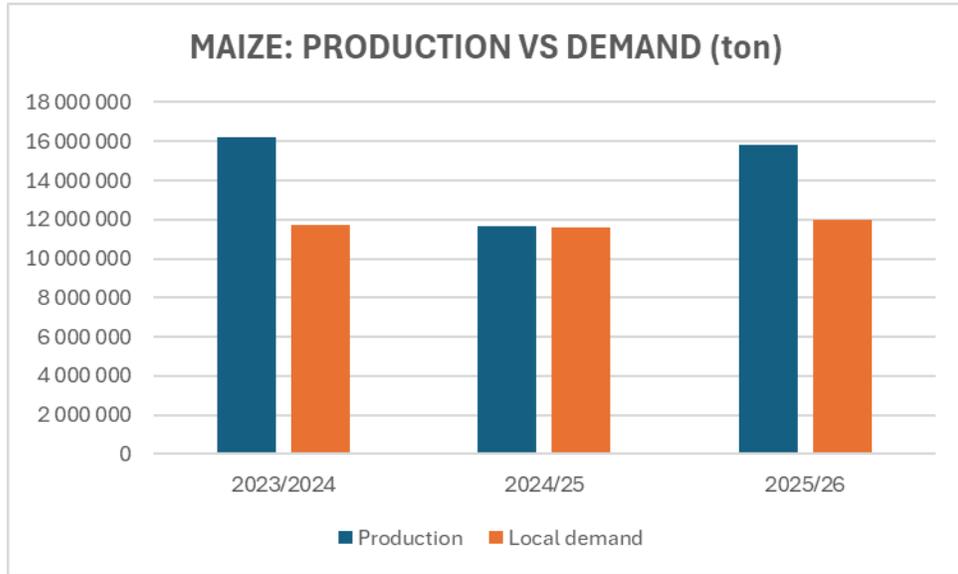
CANOLA PRODUCTION (ton x 1 000)



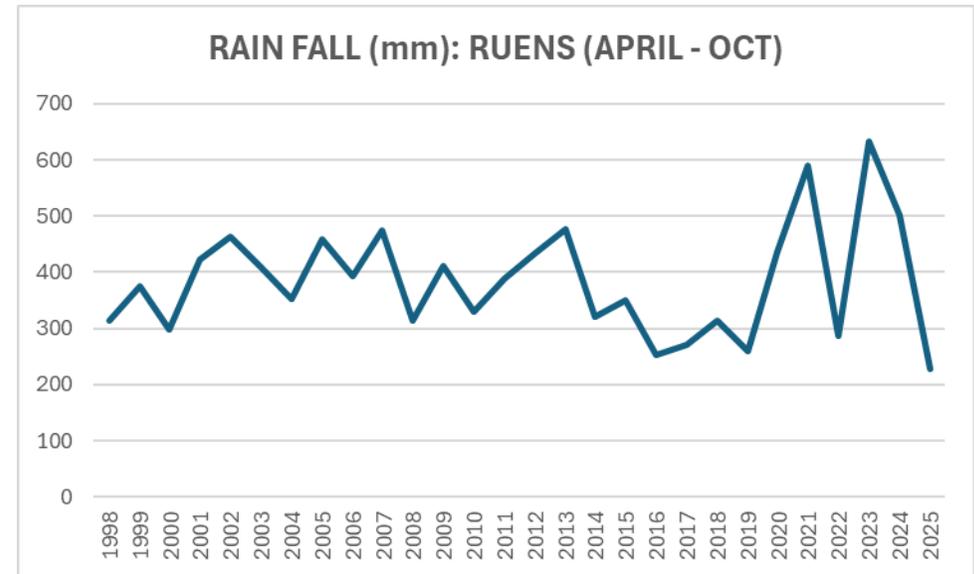
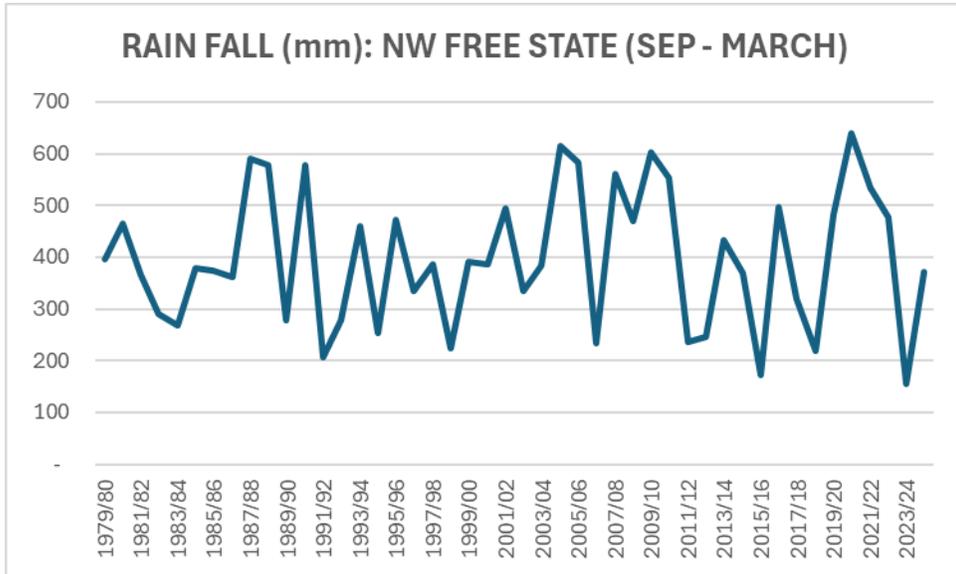
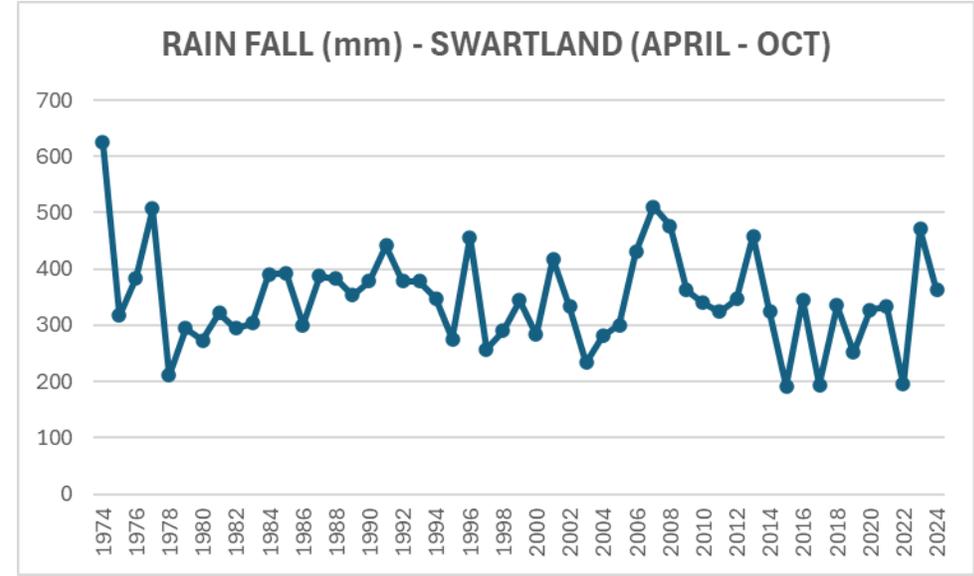
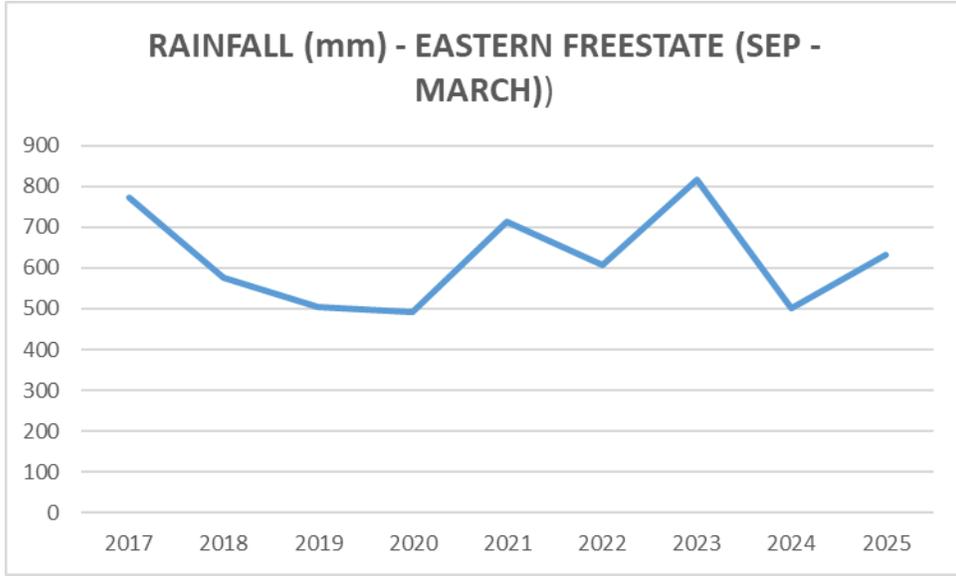
CANOLA YIELD (ton/ha)



GRAIN INDUSTRY OVERVIEW: SUPPLY AND DEMAND



GRAIN INDUSTRY OVERVIEW: HISTORICAL RAINFALL

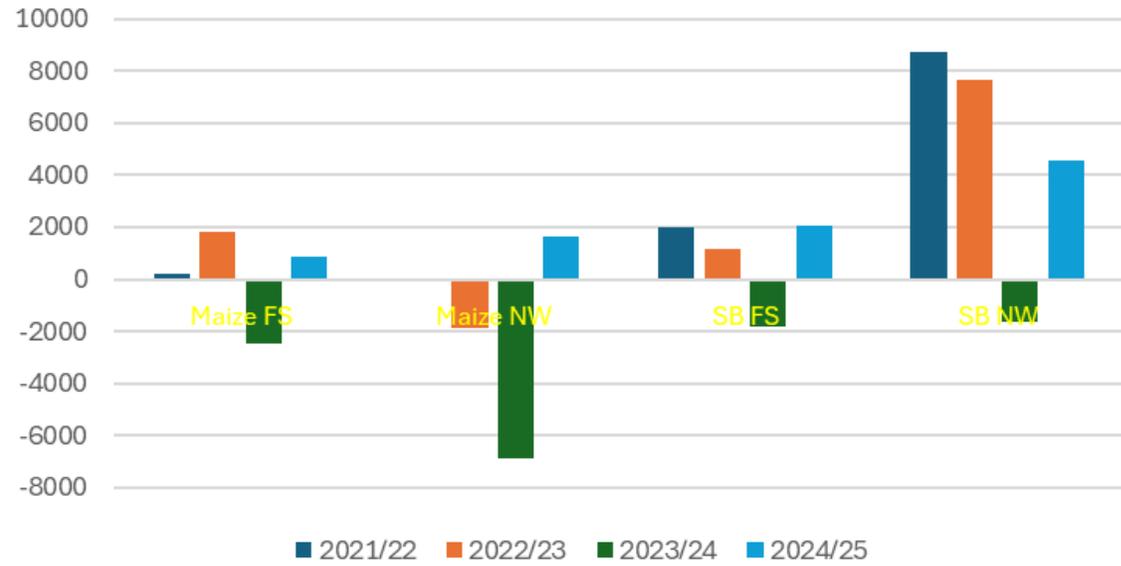


Representing a specific location in the region.

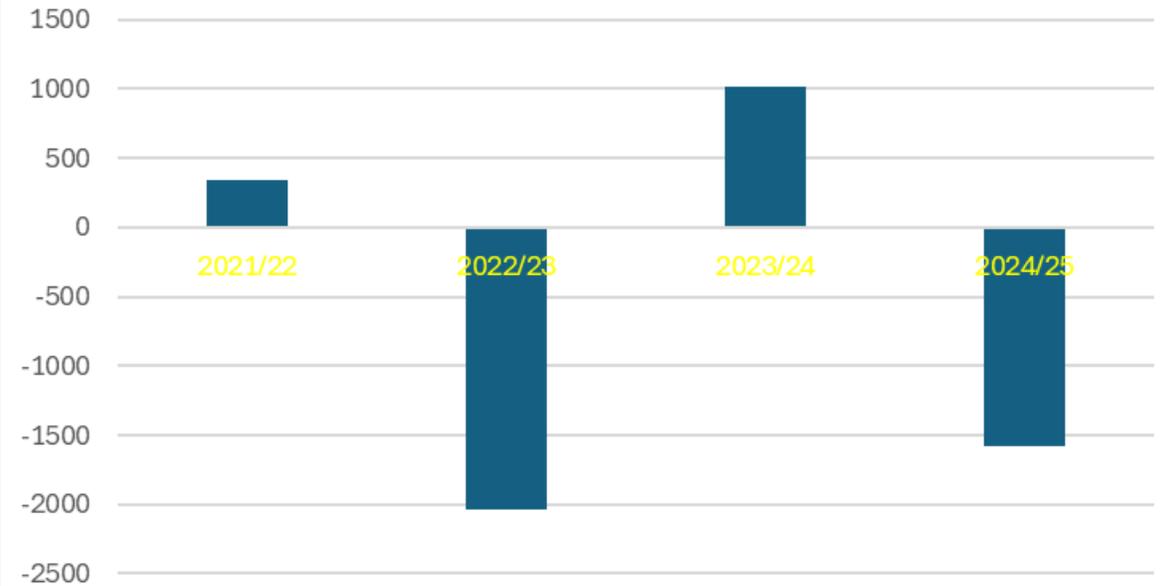
SOURCE: Agbiz Grain Members

GRAIN INDUSTRY OVERVIEW: GRAIN ECONOMICS

NET MARGIN/HA: MAIZE & SOYBEANS



NET MARGIN/ha: WHEAT (SWARTLAND)



SOURCE: GRAIN SA & AGBIZ GRAIN.

Marketing strategies, yield, cost structures and prices can influence individual figures.

IMPORTANT ASPECTS IN 2026

- **Price and Production risks**
 - Production Systems – Conservation Agriculture
 - Continuous Research
 - New technologies – NBT, AI, Precision farming.
 - Accurate and timely market information.
 - Fair and sound market system.
 - Transformation
- **Infrastructure**
 - Roads
 - Rail
 - Local government

IMPORTANT ASPECTS IN 2026

- **Legal aspects**

- Focus on the use of agro-chemicals and campaign for the banning of all chemicals.
- Grading Regulations – Canola grading regulations are currently being reviewed.
- Standards Regarding Food Hygiene and Food Safety (Agricultural Product Standards ACT, 1990 (ACT No. 119 of 1990).

- Wheat Tariff system.

- White wheat.

AGBIZ GRAIN CURRENT PROJECTS: TRAINING

- Shortage of Grain Depot Managers.
- Need for standardised and accredited training.
- **Grain Depot Manager Course (QCTO accredited)**
 - In conjunction with Peritum.
 - Combination of in-person, teams, self-study (online), and practical learning.
 - Started in 2024.
 - First students will complete the course in 2026.

AGBIZ GRAIN CURRENT PROJECTS: TRAINING

- **Fumigation Program**

- Program curriculum was developed and submitted to the QCTO in July 2025.
- Waiting for final approval by QCTO.

- **Silo Operator**

- Skills development program.
- Curriculum development in 2026.

AGBIZ GRAIN CURRENT PROJECTS: SHEQ AUDIT

- Storage facilities are unique with different requirements compared to factories, mining, and other industries.
- The Agbiz Grain SHEQ Audit will focus on grain handling and storage facilities.
- Five pillars:
 - the Standards document
 - the Audit Questionnaire
 - the Audit SOP
 - the Audit Process
 - and Monitoring & Evaluation.

AGBIZ GRAIN CURRENT PROJECTS: ROAD TO RAIL

- **Road to Rail**

- TFR split into TFR (rolling stock) and TRIM (Transnet Railway Infrastructure Manager).
- TFR and Private Operators will operate on the Trim Infrastructure.
- TRIM will focus on the A-lines that include the mineral lines and the Container lines.
- An RFI (Request for Information) is expected regarding the B-lines that include the lines that connect the silo's with the main lines.
- RFP (Request for Proposal) is based on RFI.
- The possibility that the RFI can include the maintenance of the B-lines and the operational side.
- Consortia between Agbiz Grain members, traders, and private operators are possible.

AGBIZ GRAIN CURRENT PROJECTS

- **Food Safety Protocol**

- Rising customer demands for transparency and reassurance regarding food safety and hygiene.
- The document offers a practical framework for demonstrating compliance with food safety standards and legal obligations.

- **Grain theft/fraud – Grain Theft Forum**

- The intensity and frequency of grain theft and fraud are increasing.
- Grain theft/fraud has evolved into well-planned and sophisticated operations.
- Grain Theft Forum, which will coordinate strategies at a more formal and national level.

AGBIZ GRAIN CURRENT PROJECTS

- **Emergency preparedness**

- Critical part of the SHEQ process.
- Specialised equipment and personnel are required due to the unique circumstances of grain storage infrastructure, - extreme heights (40m), confined spaces, traffic on site that includes tractors and trucks, and hazardous chemicals.
- Can be impacted by the quality and availability of services provided by the local government.
- Agbiz Grain is investigating the potential role of private service providers to support emergency response capacity.

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