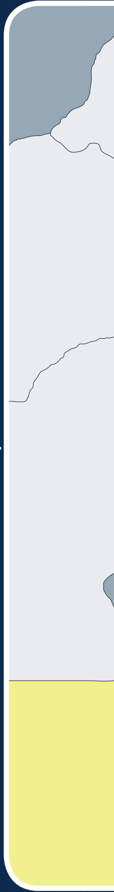
SOUTH AFRICAN SUGAR INDUSTRY

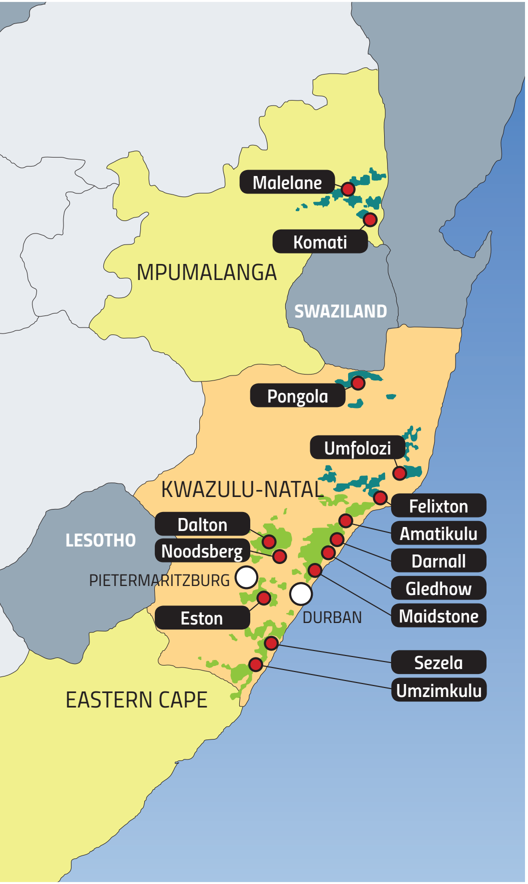
DIRECTORY

2019/2020

WHERE ARE WE LOCATED?

- 🟦 Irrigated Areas
- 🟩 Rainfed Areas
- 🔴 Sugar Mills




Malelane
Komati
MPUMALANGA
SWAZILAND
Pongola
Umfolozi
KWAZULU-NATAL
Felixton
Amatikulu
Darnall
Gledhow
Maidstone
Dalton
Noodsberg
LESOTHO
PIETERMARITZBURG
Eston
DURBAN
Sezela
Umzimkulu
EASTERN CAPE

CONTENTS

SA SUGAR INDUSTRY OVERVIEW

The South African sugar industry is one of the world's leading cost-competitive producers of high quality sugar, ranking in the top 15 out of approximately 120 sugar producing countries worldwide.

It is a diverse industry, combining the agricultural activities of sugarcane cultivation with the manufacture of raw and refined sugar, syrups, specialised sugars by-products and co-products. In line with developments in the global sugar sector, it has the potential to be a producer of renewable energy, bio-fuels and bio-plastics.

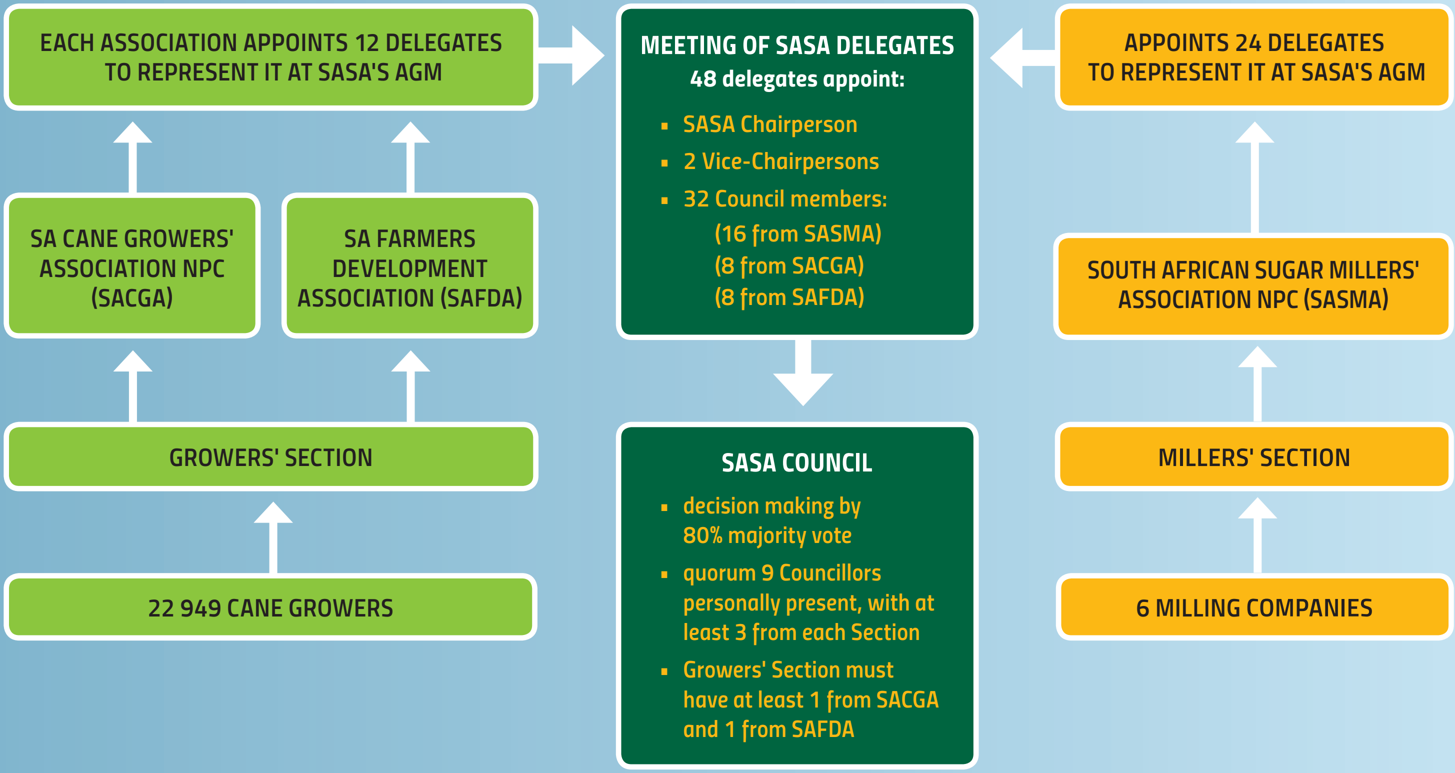
Sugarcane is grown by approximately 22 949 registered sugarcane growers and sugar is manufactured by six milling companies with 14 sugar mills operating in the cane-growing regions. Sugarcane is a strategic crop for Mpumalanga and KwaZulu-Natal, comprising nearly 50% of field crop gross farming income across these two provinces where sugarcane is grown.

The industry produces an average of 2,3 million tons of sugar per season however the drought that gripped eastern and central South Africa considered to be the worse since 1992, has had an adverse impact on the sugar industry and seen the crop decline to 1,6 million tons of sugar in the 2015/2016 season. Despite this drop, there is sufficient sugar to satisfy the domestic market in South Africa. The previous season 1 April 2014 to 31 March 2015 closed at 2,115 million tons sugar.

Approximately 75% of the area of sugarcane harvested in South Africa is dryland (relying on rainfall) and 25% is irrigated, and as such the impact of drought is widespread. In addition to the dryland regions some irrigated areas have been affected due to water restrictions. Irrigation is found predominantly in Mpumalanga and in Pongola in northern KwaZulu-Natal. Rainfall is most needed from December to March when the crop is growing actively and evaporative demand is high. Approximately 800mm per annum is needed. Rainfall has been very low in most of the industry from November 2014 to date.

The Growers and the Millers have partnered together to ensure the efficiency and sustainability of the sugar industry.

TRANSITIONAL PROVISIONS
SASA MEMBERSHIP AND REPRESENTATION



EACH ASSOCIATION APPOINTS 12 DELEGATES TO REPRESENT IT AT SASA'S AGM

SA CANE GROWERS' ASSOCIATION NPC (SACGA)

SA FARMERS DEVELOPMENT ASSOCIATION (SAFDA)

GROWERS' SECTION

22 949 CANE GROWERS

MEETING OF SASA DELEGATES

48 delegates appoint:

- SASA Chairperson
- 2 Vice-Chairpersons
- 32 Council members:
  - (16 from SASMA)
  - (8 from SACGA)
  - (8 from SAFDA)

SASA COUNCIL

- decision making by 80% majority vote
- quorum 9 Councillors personally present, with at least 3 from each Section
- Growers' Section must have at least 1 from SACGA and 1 from SAFDA

APPOINTS 24 DELEGATES TO REPRESENT IT AT SASA'S AGM

SOUTH AFRICAN SUGAR MILLERS' ASSOCIATION NPC (SASMA)

MILLERS' SECTION

6 MILLING COMPANIES

INDUSTRY STRUCTURE

The South African Sugar Association administers the partnership on behalf of the Growers and the Millers. The Growers' section comprises of the South African Cane Growers' Association (SACGA) and the South African Farmers Development Association (SAFDA). The Millers' Section comprises of all six Milling companies.

The South African Sugar Association (SASA) is an autonomous organisation. In terms of the Sugar Act and Sugar Industry Agreement, statutory powers of self-governance are granted to the sugar industry.

The South African Sugar Association's administrative, industrial activities and organisations are financed from the proceeds of the sale of local and export sugars. Its affairs are administered by the Council of the South African Sugar Association.

Following the recent industry developments, transitional arrangements have been introduced for the period of 1 April 2018 – 31 March 2020.

Consequently, the Association's Council shall comprise 32 Councillors appointed at a meeting of the Association: of whom 16 shall be nominated by the delegates of the Millers' Section, 8 shall be nominated by SACGA's delegates of the Growers' Section and 8 shall be nominated by SAFDA's delegates of the Growers' Section.

Each Section may nominate a total of 6 alternates to its elected Councillors, provided that the delegates of SACGA may nominate a total of 3 alternates to its elected Councillors and the delegates of SAFDA may nominate a total of 3 alternates to its elected Councillors.

Council shall consist of a Chairperson and 2 Vice-Chairpersons. A person nominated by each of the Millers' Section, SACGA and SAFDA shall be elected as Chairperson and the 2 Vice-Chairpersons respectively.

SOCIO-ECONOMIC CONTRIBUTION OF THE SOUTH AFRICAN SUGAR INDUSTRY

The South African sugar industry makes an important contribution to the economy given its agricultural and industrial investments, labour intensity, and linkages with suppliers, support industries and customers. The industry is a catalyst to development and creates employment in rural and deep rural areas where there is often little other economic activity.

Direct employment in the sugarcane field and the sugar mills cuts across a diverse array of skills from farm labourer to agricultural scientist. There are approximately 85 000 direct jobs and 350 000 indirect jobs. Approximately one million people, or 2% of South Africa's population, depend on the canegrowing and milling activities of the industy.

Sugarcane is a bulky commodity which requires rapid post-harvest processing to preserve the sucrose in the cane stalk. As a result sugar mills are located as close as possible to cane supply. The financial viability of these significant capital investments is dependent on a sustainable supply of sugarcane in each mill supply area. The economic activity generated in rural areas because of sugarcane cultivation and production creates jobs in support industries and commerce.

The drought has affected the livelihoods of people employed directly and indirectly by the industry, particularly in rural areas where there is little employment. Some sugar mills in the industry were not opened, or remained closed for extended periods during the 2015-2016 season due to a lack of cane availability within the milling area signifying the severity of the drought. Although the drought affects all growers, small-scale growers, land reform growers and new entrant growers are the hardest hit.

BUILDING SUSTAINABLE COMMUNITIES

Despite the tough environment in which the sugar industry finds itself its focus remains on maintaining and building sustainable communities in which it operates through projects that include funding, training, support, administration and management in land reform, human resource development, education and training, skills development, social enterprise development, and health and welfare.

The South African sugar industry promotes diverse ownership of agricultural land under sugarcane, and recognises the need for support initiatives to promote the sustainable transfer of land.

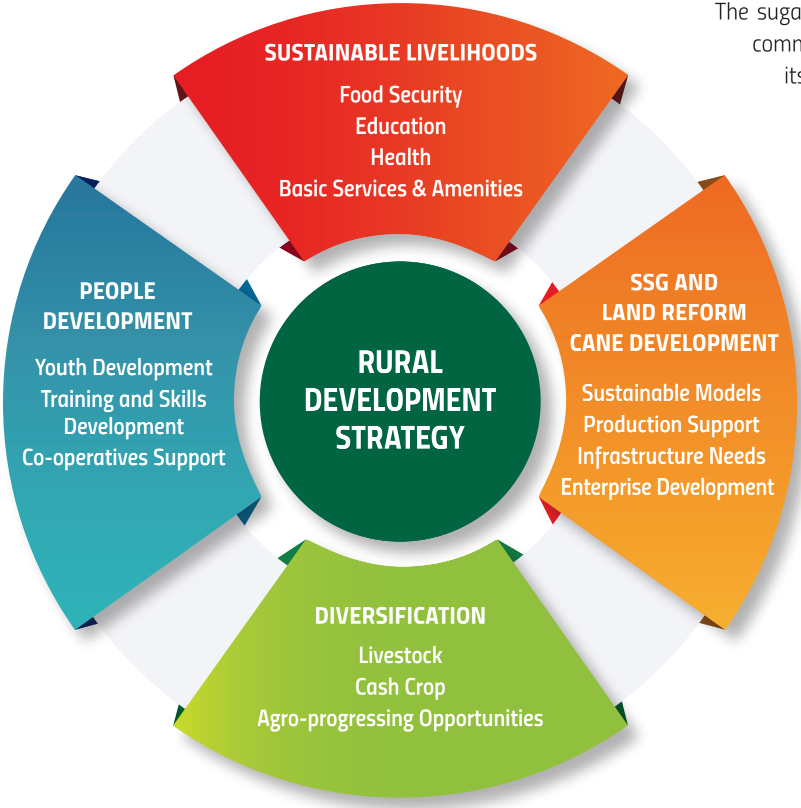
The sugar industry's ongoing commitment to land reform, its many initiatives and its partnering with government has contributed to the transfer of 22,3 % of freehold land under commercial sugar cane production from white growers to black growers.

There have been positive developments in land reform such as the settlement of outstanding restitution claims. The South African Sugar Association entered into an MoU with the Regional Land Claims Commission, confirming processes for the sustainable transfer of land.

Land reform in the industry commenced in 1996 when Illovo Sugar and Tongaat Hulett Sugar initiated land transfers of their properties to black growers. This led to 18 789 hectares being transferred to 170 black growers. Today there are more than 74 600 hectares of freehold land that have been transferred. Currently, approximately 130 000 hectares are under claim.

Robert Ntuli, standing left, Chairman of Ekhamazi Trust with fellow co-owners.

BUILDING RURAL COMMUNITIES



The sugar industry is primarily a rural based industry, and the rural communities that form part of its footprint are a key stakeholder to its sustainability. In order to maximize the development of both the people and the land, the sugar industry has formulated a rural development strategy that proposes an inclusive rural development model for the cane growing areas of communal land. The strategy provides a framework that will facilitate the coordinated implementation of interventions aimed at developing stable and prosperous rural communities.

The model proposes an integrated approach to sustainable cane development which is supported by the provision of strategic infrastructure, and support for the development of community based enterprises in the sugar cane production value chain. The model also acknowledges that other commodities like livestock and cash crops need to co-exist with sugar cane. It is envisaged that partnerships will be developed between government, communities and the industry in the implementation projects.

TECHNOLOGICAL EXCELLENCE

One of the industry's hallmarks is its technological excellence. The South African Sugarcane Research Institute (SASRI) and the Sugar Milling Research Institute NPC (SMRI) contribute to the industry remaining at the forefront of innovation.

SASRI is the leading sugarcane agricultural research institute in Africa, renowned for its research into the development of new sugarcane varieties and improvement of crop management and farming systems to enhance profitability of the industry.

Effective exchange of new knowledge and delivery of new technology make a significant contribution to the sustainability of the industry. Research is clustered within four multi-disciplinary programmes including variety improvement, crop protection, crop performance and management, and a systems design and optimisation programme. Further detail is provided in the South African Sugar Association section.

The SMRI is the central scientific organisation involved in research work and technical services for the southern African sugar milling and refining industries. All 14 raw sugar factories in South Africa and the central refinery are full members of the SMRI.

The South African Sugar Technologists' Association (SASTA) promotes the interchange of scientific knowledge and investigation of technical issues related to the production and processing of sugarcane. SASTA also promotes the accuracy and standardisation of factory chemical control methods and assists in improving the technical knowledge of persons engaged in the industry. While research into all aspects of sugarcane agriculture and milling practice is encouraged, an annual congress enables dissemination of new knowledge and assists in skills development.

SKILLS DEVELOPMENT AND PEOPLE EMPOWERMENT

The multifaceted contribution of skills development, training, and education by the South African sugar industry includes: direct skills development, specific training courses, bridging courses, agricultural and industrial training, the provision of bursaries, funding of programs that improve the quality of education in rural primary and high schools, provision of material on nutrition, and opportunities in the field of science and technology.

Divisions of the South African Sugar Association delivering on the objective of strengthening skills includes the South African Sugarcane Research Institute, the Shukela Training Centre, and the Nutrition Department. Other establishments that contribute to this objective include The Sugar Industry Trust Fund for Education, and the Sugar Milling Research Institute.

DEVELOPING THE NATIONAL SKILLS BASE

SASA's contribution to strengthening skills includes training courses offered at the Shukela Training Centre and opportunities in the field of science and technology.

Human resource development is a major area of social investment for the sugar industry. Numerous initiatives are maintained by the industry to promote human resource development, and are primarily focused on promoting Broad-Based Black Economic Empowerment. The initiatives are multidimensional and a brief overview is given below.

Ownership Profile – The industry's focus includes the progressing of transformation through the ownership profile of the sugar industry through land reform as well as initiatives by the milling sector which has resulted in increased black ownership of sugar manufacturing capacity, for example, the Gledhow Sugar Company (PTY) Limited has 34.9% black ownership.

Support Services – The industry has a long history of promoting and supporting small-scale farmers on tribal land. Building on the extensive infrastructure and network of the growers and millers, the industry has been able to engage effectively in ongoing delivery related projects.

Mentorship programmes focusing on business skills and grower support extension services are deployed to support cane growing activities.

The South African Sugar Association provides in-field training to small-scale growers, offers certified courses in sugarcane agriculture and provides technology transfer and extension services.

EMPLOYMENT EQUITY

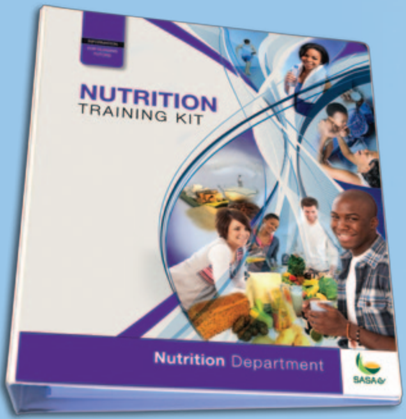
All participants in the industry promote compliance with the Employment Equity Act, and have integrated Employment Equity and Skills Development Plans in place that are monitored and updated annually. These have targets for recruiting, developing and promoting employees from designated groups.

Enterprise Development – The industry is involved in an array of projects that seek to accelerate access to employment opportunities and increase participation in the economy. The industry partners with organisations to contribute to economic growth.

Educational Support – The Sugar Industry Trust Fund for Education (SITFE) was launched in 1965 as a private sector initiative and is regarded as one of the oldest Trust Funds in South Africa. The mission of SITFE is to support, promote and advance sustainable, quality education in South African sugarcane growing areas.

SITFE supports a wide range of programmes ranging from the school support programme; study assistance programme; in-whole school support programme; early childhood development programme; and an education centre development programme. These programmes are implemented in order to improve the quality of teaching and learning, educators and communities within the sugarcane growing communities.

Technology Exchange – The South African Sugarcane Research Institute contributes to the profitability and sustainability of the industry whilst encouraging environmentally responsible farming practices. Outputs from the research programmes are transformed into practical knowledge and technology products. Training and development takes place through courses and a series of interventions by a network of Extension Specialists.



IMPROVING THE HEALTH OF ALL SOUTH AFRICANS

Sugar has been part of our lives for centuries and can be enjoyed as part of a healthy balanced lifestyle which includes eating a variety of foods, physical activity and maintaining a healthy body weight.

The sugar industry communicates science-based information on the role of sugar, through its Nutrition Department at the South African Sugar Association, providing nutrition education material for the medical and education sectors and providing nutrition training of health workers.

The industry is committed to supporting nutrition research in South Africa through an independent panel of scientists that allocate grants for projects undertaken in tertiary institutions.

PROMOTING A HEALTHY LIFESTYLE

The sugar industry is aware of the increase in obesity in the South African population and contributions to decreasing national prevalence of obesity has become a priority. There is increasing evidence that insufficient physical poses a health risk especially for conditions such as diabetes and heart disease. The sugar industry has committed to promoting physical activity through building outdoor gyms in rural communities where there is no access to gym facilities. To date the industry has built six outdoor gyms in communities situated within the sugarcane growing belt. In partnership with Diabetes South Africa, the sugar industry contributes to increasing the awareness of diabetes at the annual Global Diabetes Walk.

YOU AND SUGAR

There is so much inaccurate information when it comes to nutrition, particularly on sugar and health, that it becomes difficult to tell fact from fiction. A visit to **www.sasa.org.za** will help clear misconceptions and myths about sugar as it contains science-based facts about sugar and health.

There is a considerable amount of information on the website including the South African Guidelines for Healthy Eating, science facts about sugar, about lifestyle diseases such as obesity and diabetes, information provided by specialists on exercise and how to develop healthy eating habits.

All the information has been reviewed by dieticians registered with the Health Professions Council of South Africa.

PURSUING INTERNATIONAL TRADE

Despite the South African sugar industry's production efficiencies, it operates within the context of a distorted world market, characterised by subsidy-induced overproduction in a number of major sugar-producing countries. Sugar remains one of the most distorted international commodities and will remain so in the absence of multilateral reform and liberalisation.

REGIONAL TRADE

The South African government's support in the area of regional trade is endorsed in the Department of Trade and Industry's Strategy for the Optimal Development of the Sugar Industry within the context of the South African Customs Union and the Southern African Development Community (SADC).

SADC is comprised of 15 member states of which 11 produce sugar. Within SADC, South Africa is the largest sugar producer. To advance the objectives of Annex VII (referred to as the Sugar Co-operation Agreement) of the SADC Trade Protocol, a Regional Sugar Strategy and Action Plan have been developed. The main objectives of Annex VII include promoting, within the region, production and consumption of sugar and sugar-containing products according to fair trading conditions and an orderly regional market in sugar for the survival of the sugar industries in all sugar producing member states, in anticipation of freer global trade.

INTERNATIONAL TRADE

Access to major markets for raw and refined sugar is restricted by high tariffs and preferential trade arrangements such as tariff-rate quotas. These global market distortions also threaten the maintenance of a profitable and sustainable sugar price on the domestic market. Less than 10% of the industry's production on average enters foreign markets under preferential market access arrangements. The majority of sugar exported must therefore be sold on the world market.

Government's strategic support for the South African sugar industry recognises the distorted nature of the world market for sugar, and the impact of prevalent producer support measures on price determination on the global market. Government support includes intervention in the following three areas: tariff protection; provision for the establishment of equitable export obligations; and support for the SADC Sugar Cooperation Agreement. When compared to its global partners, South Africa remains one of the least regulated producers of sugar.

TARIFF

Within the South African Customs Union (SACU), in which South Africa and Swaziland are the only sugar producers, the dollar-based reference price tariff system delivers a measure of protection when the world price drops below a reference price. The sugar industry addresses matters relating to the effectiveness of tariff protection with the Department of Trade and Industry and the International Trade Administration Commission (ITAC) on an on-going basis.

EQUITABLE EXPORT OBLIGATIONS

The profitability of the industry's exports to the world market is affected by subsidy-induced oversupply of global demand. The South African sugar industry typically exports more than 5% of its sugar production to the world market at prices which are normally substantially below the domestic sugar price. World market prices have historically trended below the average global cost of production. The Sugar Act and associated Sugar Industry Agreement provide regulatory support in the distribution of exposure to the world market equitably amongst growers and millers.

SUSTAINABLE RESOURCES

Increased climate variability manifesting through, for example prolonged droughts, changes in rainfall and temperature patterns, impact the sustainability of the South African sugar industry, an agricultural and agro-processing industry which is dependent upon natural resources. As a user of natural resources, the industry is committed to promoting sustainable resource use and management such that it does not create an imbalance within the environment in which it operates but also supports local socio-economic growth and development. Efforts to contain the demands for water using water conservation and demand management approaches, promoting sustainable environmental and agricultural practices, good catchment stewardship and compliance to regulations are essential.

Increased collaboration between industry, government and NGOs towards shared value partnerships and holistic catchment management (e.g. Umgeni Ecological Infrastructure Partnership, Mhlatuze Water Stewardship Partnership, Midlands Sustainable Sugar Supply Chain Collaboration), enhance the efforts in the sugarcane growing belt towards sustainable natural resource use and management. The continual development and application of sustainable management tools such as the Sustainable Sugarcane Farm Management System (SUSFARMS®) and other International Organisation for Standardisation (ISO) standards assist in such sustainability initiatives.

DIVERSIFICATION IN RENEWABLES

Diversification of the SA sugar industry is essential, if the industry is to remain a competitive part of the agricultural and agro-processing sectors of the South African economy into the future. It is a global fact that most sugar only industries are uncompetitive. Across the world, including BRICS countries or in Africa, cane or beet sugar industries have transitioned from being sugar producers only to become producers of sugar, energy (electricity and biofuels), and other biobased products (e.g. bioplastics, biochemicals). Global assessments indicate that various government programmes have had to be launched to enable electricity, biofuels and other biobased products, in countries that have successfully implemented such initiatives.

The SA sugar industry must diversify its product offerings into energy and other biobased niche product markets in order to be sustainable, grow the "revenue pie", and to contribute as a transformed, competitive and profitable, job creating industry. Diversification initiatives will work as catalyst for the participation of previously disadvantaged groups, accelerating the pace of transformation in the SA sugar industry, supporting black growers and enabling black industrialists.

The industry has identified four areas of diversification – cogeneration, biofuels, beneficiation of agricultural residues such as biogas and biobased products.

- Biofuels – implementation of greenfield and brownfield fuel ethanol projects in the SA sugar industry
- Cogeneration – operationalise sugarcane cogeneration independent power producers as part of the energy mix in South Africa
- Beneficiation of agricultural residues such as biogas – commercialisation of biogas plants on a range of biogas plants
- Biobased products – biobased niche products from sugarcane such as bioplastics and biochemical.

All four diversification areas aim to harness the full value of the sugarcane stalk producing sugarcane-based products which have already been manufactured in other parts of the African continent and the world.

The SA sugar industry is at a critical tipping point, where the policy environment is not conducive for the survival and growth of the sugar sector. The industry needs a "game changer" that allows for the swift introduction of proven technology and production, with significant impact on sugar volumes being uplifted through a new market. This is undoubtedly diversification into fuel ethanol production and other renewable products that will improve the sustainability of the industry as a whole. With enabling legislative, investment and market conditions, diversification projects will be realised in the SA sugar industry. These conditions will be informed by energy policies that promote fuel ethanol from sugarcane, procurement of sugarcane cogenerated electricity and mandatory interventions for biobased materials that stimulate market demand and uptake.

CANE GROWING IN SOUTH AFRICA

Sugarcane is a strategic crop for KwaZulu-Natal and Mpumalanga, where sugarcane production is located, comprising a substantial percentage of field crop gross farming income across the two provinces. The approximately 22 949 registered sugarcane growers who annually produce on average 20 million tons of sugarcane from 14 mill supply areas, extending from southern KwaZulu-Natal to the Mpumalanga Lowveld. Currently, growers are represented by the South African Cane Growers' Association (SACGA) and the South African Farmers Development Association (SAFDA). There are approximately 21 581 small-scale growers, of whom 12 019 delivered cane in the *2018/2019 season, producing 9.33% of the total crop. This includes 116 consolidated units, comprising co-operatives, trusts and projects, which are made up of 7 536 individual beneficiaries. There are approximately 1 368 large-scale growers – including 345 black emerging farmers – who produce 81,17% of total sugarcane. Milling companies with their own sugar estates produce 9.17 % of the crop.

**As at 7 January 2019.*

SA CANE GROWERS' ASSOCIATION

The South African Cane Growers' Association was established in 1927 to create a common platform to address grower issues.

As a registered non-profit company under the 2008 Companies Act the association assures growers of good governance, transparency and accountability with respect to their member contributions.

Today, SA Canegrowers protects the interests of its members by:

- lobbying for an appropriate legislative environment,
- negotiating the best price for their cane,
- ongoing research and analysis, and
- providing growers with critical information to allow them to make sound decisions at farm, mill and industry level.

Through advocacy and structural support, SA Canegrowers furthers the interests of all its members both at national and local government level as well as within the industry itself.

Information gleaned from the annual cost surveys is audited and used to defend the economic circumstances of all growers with:

- ITAC for tariff applications,
- SARS for special dispensations for smallscale growers such as the VAT flat rate and the diesel rebate,
- Bankers when considering their investment in sugarcane farming,
- the European Union when considering access to their market,
- the Department of Trade and Industry when considering the required in-flow of sugar from neighbouring countries.

This knowledge drives applications for:

- funding
- research
- innovation and development and
- any submission to the South African government on proposed legislation, the economic impact on growers is considered and lobbied.

SA Canegrowers is specifically structured to ensure equitable and fair representation of all growers in the industry.

No individuals are members of SA Canegrowers, instead, there are 26 member-organisations that constitute the members of SA Canegrowers.

SA Canegrowers has 14 local grower councils who assist and support growers within their communities and districts across the sugarcane growing regions of the country.

These grower councils are supported by the SA Canegrowers staff of which 50% are women. The association is strategically led by its Board and the SA Canegrowers Congress.

All growers are supported through key divisions of SA Canegrowers who have industrial oversight including the:

- protection of the local market from imports,
- export of surplus sugar,
- setting of the notional price of sugar,
- fixing of the recoverable value price,
- pest and disease control,
- the single export channel,
- the research on cane varieties and
- cane testing services.

Dedicated resources are provided to members by locally based:

- SA Canegrowers' Area Managers,
- Senior Agricultural Business Advisors and
- Agricultural Business Advisors in each of the 14 mill areas.

SA Canegrowers dedicates R15m of a R50m budget to support of smallscale and land reform beneficiary growers.

Of the 22 949 growers, 21 581 are small-scale growers and 1 368 farm sugarcane commercially.

These members employ 11% of South Africa's agricultural workforce creating 85 000 direct jobs.

Grower revenue totalling R9 billion impacts the economies of deep rural areas of KwaZulu-Natal and Mpumalanga.

In line with the South African government's policy to transform land ownership in the country, 22% of white owned land has been transferred to black ownership.

South Africa's sugarcane crop contributes 14% to the national GDP, pays 0.5% of the country's tax revenue and contributes 0.3% of the national salaries and wages bill.

SOUTH AFRICAN FARMERS DEVELOPMENT ASSOCIATION

The South African Farmers Development Association (SAFDA), which was established on 25 November 2015, is a registered not-for-profit development association of farmers.

SAFDA was provisionally recognized by the South African sugar industry at the end of December 2017, when it was given a voice but not a vote on the Sasa Council. This followed a protracted two-year battle to gain official recognition following concerns raised about the plight of small-scale and land reform farmers. In October 2018, SAFDA was officially recognised as a farmer representative body in the South African sugar industry through gazetting of transitional provisions by the dti.

Some of the key challenges that led to SAFDA's formation was the decrease in the number of small-scale farmers from 50 000 in the early 2000s to about 20 000 currently, as well as the lack of development and growth of land reform farmers.

The Association therefore sees itself as a case for South Africa's economic transformation in the agribusiness sector and a home for all progressive farmers – black and white, small, medium and large.

While serving the business interest of all its members, the Association pays special attention to improving profitability and sustainability of small-scale and land reform farmers.

This is at the heart of SAFDA's focus areas of:

- Transformation
- Land Reform and Small-scale Farmers
- Grower Capacity Development
- Grower Financing
- Bulk Buying, Diversification and Value-Chain Participation.

As part of its main functions, SAFDA offers economic research and business advisory services, grower training and development, lobbying and advocacy for policies thereby ensuring the sustainability of all farmers.

SAFDA's vision, mission and values focus on both short-term and long-term objectives. In the short term the focus is predominantly on the challenges facing small-scale and emerging farmers in the sugar industry. This can be traced back to the reason that SAFDA was borne – to be the voice for the voiceless and marginalised sugarcane farmers who felt excluded from effective participation in the traditional industry structures that have been in place for well over a century.

SAFDA aims to influence the full industry value chain, to ensure that like-minded farmers can realise value from greater participation in each link and make a sustainable contribution to the industry and the economic wellbeing of the country.

VISION

Thriving rural communities – thriving rural economy

MISSION

To work towards farmer driven partnerships for transformation, development and sustainability of all farmers and the enhancement of rural economies.

VALUES

- Co-operation
- Diversity
- Integrity
- Honesty
- Profitable Partnership
- Accountability
- Efficiency and Reliability
- Respect

SUGAR MILLING & REFINING

The milling sector employs upwards of 7 000 people at 14 sugar mills and at the companies' administration offices. Two of the mills are located in the Mpumalanga Province while the remainder are located in the KwaZulu-Natal Province. Illovo Sugar (South Africa) (Pty) Ltd and Tongaat Hulett Sugar South Africa Ltd own four mills each while RCL Foods Sugar & Milling (Pty) Ltd owns three mills. Gledhow Sugar Company (Pty) Ltd, UCL Company (Pty) Ltd and Umfolozi Sugar Mill (Pty) Ltd own one mill each.

There are five refineries in the industry manufacturing white sugar. Four of which are annexed to sugar mills whilst Tongaat Hulett Sugar South Africa Ltd operates a stand-alone refinery located in Durban. Not all milling companies own refineries.

Sugar which is not sold by milling companies in the domestic market is delivered to SASA for export. Some milling companies export raw bagged and refined sugar to countries which do not form part of the domestic market.

Utilising all the potential of the sugar cane plant is the key factor in today's highly integrated sugar milling operations. Other than producing high quality sugars of international standard, milling companies produce a range of other products from the processing of sugar cane. Amongst these are animal feeds and chemical products e.g. alcohol and furfural.

The milling sector, through the milling process, has significant potential to manufacture environmentally friendly renewable energy by generating electricity for the national grid and with the production of fuel grade ethanol. However, in order to achieve this, a legislative framework is required.

THE SOUTH AFRICAN SUGAR MILLERS' ASSOCIATION NPC

This Association represents the interests of all sugar millers and refiners in South Africa. The Association's objectives cover industry partnership administrative matters, legislative measures affecting the industry, and support for training and scientific and technological research.

The Association is administered by an executive and staff who undertake these activities and interact with the grower associations, the South African Sugar Association and various national government departments on sugar industry matters.

The members of the South African Sugar Millers' Association are:

- Gledhow Sugar Company (Pty) Ltd
- Illovo Sugar (South Africa) (Pty) Ltd
- RCL Foods Sugar & Milling (Pty) Ltd
- Tongaat Hulett Sugar South Africa Ltd
- UCL Company (Pty) Ltd
- Umfolozi Sugar Mill (Pty) Ltd

GLEDHOW SUGAR COMPANY (PTY) LTD

The youngest sugar company in South Africa, Gledhow is located 75kms north of Durban, at KwaDukuza. Ownership is spread across four distinct and complementary shareholders (Ushukela Milling, Illovo SA, the Gledhow Growers and Sappi). The Mill produces refined sugar to EEC2 standard, and supplies this sugar to the food and beverage industries in Southern Africa.

ILLOVO SUGAR (SOUTH AFRICA) (PTY) LTD

Illovo Sugar (South Africa) (Pty) Ltd ("Illovo SA") operates four sugar mills in South Africa, one of which has a refinery and three which have packaging plants. It also operates a fifth sugar mill and refinery in which the company has a 30% share. Illovo SA has three cane growing estates and, in addition to producing specialty sugars and syrup, also produces a variety of high-value downstream products.

RCL FOODS SUGAR & MILLING (PTY) LTD

RCL Foods Sugar & Milling (Pty) Ltd operates three sugar mills (two of which have refineries), a packaging plant, sugar estates, cane and sugar transport and an animal feed division. Over and above their involvement in the sugar industry, the company is a significant flour miller with bakery interests.

TONGAAT HULETT SUGAR SOUTH AFRICA LTD

Tongaat Hulett Sugar South Africa Ltd operates four sugar mills in South Africa two of which have packaging plants, a central refinery in Durban which has its own packaging plant, various sugar estates and an animal feeds operation.

UCL COMPANY (PTY) LTD

UCL Company (Pty) Ltd operates a sugar mill, a wattle extract factory, a saw mill, a number of mixed farms and a trading division.

UMFOLOZI SUGAR MILL (PTY) LTD

The Umfolozi Mill is owned by two shareholders. The first is a group of cane growers with cane growing interests comprising (1) a large cane growing company to the south, (2) a large cane grower in northern KwaZulu-Natal, (3) an unlisted public company whose shareholders grow sugar cane on the Umfolozi flats and (4) the Small Scale Grower Trust whose beneficiaries grow sugar cane on tribal land. The second shareholder is a large alcohol producing company in Durban. The Umfolozi Sugar Mill (Pty) Ltd bags high quality VHP brown sugar for sale into the industrial and retail markets.

SOUTH AFRICAN SUGAR ASSOCIATION

The South African Sugar Association (SASA) provides a range of specialist services that enhance the profitability, global competitiveness and sustainability of the South African sugar industry.

The Industry Affairs, Cane Testing Service, National Market, International Marketing and External Affairs divisions of SASA serve in support of the Sugar Act and the Sugar Industry Agreement, and SASA also operates the Sugarcane Research Institute and the Shukela Training Centre. These divisions, as well as the internal support functions within SASA, are described below in more detail.

INDUSTRY AFFAIRS

SASA's Industry Affairs division is responsible for the provision of a range of key support services to the Council of SASA as well as to SASA as an organisation. The division:

- Administers and is responsible for the assurance of compliance to the Sugar Act of 1978, the Sugar Industry Agreement, 2000 (SIA) and the SASA Constitution decision-making processes of the SASA Council, its numerous Committees, its wholly owned subsidiaries and the Sugar Industry Administration Board.
- Facilitates the complex decision-making processes of the SASA Council, its numerous Committees its wholly owned subsidiaries and the Sugar Industry Administration Board.

- Provides a range of legal, regulatory, compliance and secretariat services.
- Manages the application of enterprise risk and compliance processes to ensure that all risks that could prevent SASA from achieving its organisational objectives are identified and assessed, controls monitored and tasks implemented.

CANE TESTING SERVICE

The Cane Testing Service (CTS) provides a specialist service under contract to individual Mill Group Boards to determine the quality of individual grower cane deliveries to the mill for cane payment purposes. This analytical chemistry service assesses the recoverable value content in cane delivered to the mill by growers, providing a neutral and objective basis on which to calculate recoverable value payment by miller to grower. The CTS also provides a technical audit of the distribution between millers and growers ensuring fair and equitable division of proceeds.

AUTOLAB

Autolab is a division of SASA that provides high quality, innovative and cost effective information technology solutions in the development, configuration and support services for customised computerised Laboratory Information Management System (LIMS) in cane testing and factory laboratories and for customised weighbridge software for massmeter operations. Its customers are geographically dispersed with the South African customers based at all 14 sugar mills while the non-South African customers are in Mozambique, Zimbabwe, Malawi and Kenya.

The Autolab LIMS is designed to manage growers' estimates and allocations, enables the analysis of cane and factory products to determine grower payment in accordance with official methods and provides for the transfer of cane payment data into customer financial systems or centralised cane payment processing systems. Autolab also develops and maintains the systems that track sugarcane through the milling process for the purpose of sampling and testing by the Cane Testing Service (CTS) laboratories.

The Autolab LIMS is also used by process, refinery, downstream, sugar terminal and fertiliser advisory service laboratories. The sugar mill process functionality includes analysis of factory products, calculating factory stock and recoveries and the calculation of factory efficiencies. The laboratory modules interfaces with laboratory instruments to enable the automatic capture of sample results.

Autolab provides 24/7 LIMS support to the sugar industry during the crushing season and undertakes projects to develop new functionality and enhance system reliability.

SUGAR MARKETS AND LOGISTICS

The division is responsible for managing industry matters that affect the national market for sugar, including statistically analysing sugar sales, supplies and demand, researching drivers of sugar demand, monitoring of the sugar tariff regime, administering aspects of SACU/ SADC sugar agreements and the administration of industrial rebates.

The marketing, sales and logistics related to South Africa's bulk raw sugar is performed by the division. The division focuses on achieving maximum net proceeds within an acceptable level of risk. The raw sugar is sold to refineries in South Africa for export, to the European Union, the United States, Japan, China, Malaysia, Indonesia and other markets, either directly or through international trade houses. Price risk is managed by hedging the value of raw sugar exports on the InterContinental Exchange ICE US Futures No 11. Bulk raw sugar is exported through SASA's Sugar Terminal in Durban and the STAM Terminal in Maputo, in which SASA is a shareholder.

EXTERNAL AFFAIRS

The External Affairs Division supports the sustainability of the sugar industry through policy advocacy, stakeholder engagement, communications and media and, the development and implementation of industry strategies. The Division provides strategic support by identifying and addressing constraints, opportunities, relationships and perceptions impacting all dimensions of the industry. This is done by developing and maintaining a well informed and effective network of stakeholder contacts (in particular those responsible for formulating policies that may affect the industry) and pro-actively communicating strategic positions in specific areas to these stakeholders. By doing this, the Division enables the industry to manage threats as well as utilise opportunities at the regional and international level. The External Affairs Division provides specialised support in the fields of Policy Liaison, International Affairs, Renewable Energy, Nutrition, Natural Resources, Land Reform and Rural Development and Corporate Social Investment and Communications, Publications and Public Relations.

SOUTH AFRICAN SUGARCANE RESEARCH INSTITUTE

The South African Sugarcane Research Institute (SASRI) is the leading sugarcane agricultural research institute in Africa. The Institute is world renowned for its research into the development of new sugarcane varieties and improvement of crop management and farming systems to enhance profitability. Effective technology development and knowledge exchange make a significant contribution to the sustainability of the industry.

Research at SASRI is clustered within four multi-disciplinary programmes:

- Variety Improvement seeks to breed and select high yielding, pest and disease resistant varieties that meet industry requirements, using both conventional breeding and modern molecular technologies. Improving efficiencies in the development of superior sugarcane varieties and enabling appropriate variety choices for cultivation are key focus areas.
- Crop Protection research is aimed at minimising the impact of weeds, pests and diseases on crop yields in environmentally and economically sustainable ways. Emphasis is placed on:

  (1) developing integrated pest and disease management practices; and

  (2) mitigating potential biosecurity threats through the development of proactive countermeasures and threat-specific incursion plans.

- The Crop Performance and Management programme focuses on enabling production of high quality sugarcane through the development of management practices to support appropriate use of chemical ripeners, fertilisers and soil amendments. Additional focus is placed on optimising water use and harvesting practices.
- The Systems Design and Optimisation programme is directed towards investigating and developing innovative systems that optimise crop production through modeling, technology design and a farming systems approach. Development of appropriate technology transfer tools and practices is recognised as fundamental to improved adoption of research advice and sustainable sugarcane production.

SASRI's Extension Service provides the essential link between SASRI researchers and farmers through consultation and feedback. The Extension Service's role is to facilitate the adoption of technology and better management practices that encourage responsible and sustainable land use and deliver optimal productivity and profitability. The Extension Service also communicates stakeholder needs back to SASRI.

The Industry's Biosecurity function as prescribed in the Sugar Industry Agreement is also integrated into SASRI's portfolio. The purpose of this function is to manage and protect the industry from known biosecurity threats including the monitoring for potential incursions from new pests and diseases.

A range of advisory services, is enabled by the research that is conducted at SASRI. These services include advice on agrochemical stewardship, quarantine facilities and expertise, alien invasive weed biocontrol, crop forecasting, climate and related data, real time irrigation advice, mechanisation advice, GIS and mapping support. Other specialist services are provided on a user-pays basis including specialist advice on grower problems as well as soil, leaf, fertiliser and water analyses through the Fertiliser Advisory Service (FAS), RSD and nematode diagnostic services, variety fingerprinting and testing of new agrochemicals. Short courses in sugarcane agriculture at the junior and senior levels are also held annually.

SHUKELA TRAINING CENTRE

The Shukela Training Centre (STC) is a wholly owned subsidiary of the South African Sugar Association (SASA). STC was established in 1972 and is dedicated to the provision of agricultural skills and qualifications and apprentice/artisan and maintenance-worker training. The STC is the preferred training provider for South African and SADC sugarcane farmers and sugar producing companies as well as numerous other companies and some private individuals.

The STC offers qualifications accredited by various Sector Education and Training Authorities (SETAs), and the Quality Council for Trades and Occupations (QCTO). As such, STC is an accredited non-sector based skills development provider and an accredited trade test centre. The STC keeps abreast with the changing skills development landscape by having its senior employees participating in the national curriculum development initiatives.

The STC has expanded its scope of agricultural training to include other levels and certificate courses in farming. Agricultural skills training that is conducted on-farm continues to be a popular method to assist with the improvement in farm productivity. The on-site accommodation and associated catering service allow companies from a wide geographical area to benefit from the services of our excellent facility.

FINANCE

The Finance Division ensures the responsible custodianship of budgets and resources made available to SASA by the industry. In achieving this, it provides expert and comprehensive centralised financial services to the SASA divisions, such as the provision of financial advice, budgeting, financial reporting, procurement, treasury, payroll and taxation. It manages SASA's ability to obtain credit facilities and SASA's exposure to financial loss, financial risk, market risk, fraud and error. In addition, the division is responsible for Umthombo Agricultural Finance which contributes mainly to the sustainability of small-scale grower sectors through the provision of financial services.

INFORMATION SYSTEMS

The Information Systems Department provides technical support to computer users in the SASA divisions. The department is responsible for the design, implementation and maintenance of all computer network services. The weekly processing of the Industrial Systems that determine cane payment amounts for growers who have delivered sugarcane to the mills is also performed by the department.

HUMAN RESOURCES

As a provider of specialist services, SASA's performance and service levels are highly reliant upon the performance and service of SASA's employees. The diversity of the skills SASA employs, ranging from high level specialists to unionised industrial and agricultural labour, and the wide geographical spread of our operations, makes the effective management of people, their knowledge and their performance particularly important.

In support of this need, the Human Resources Division provides a comprehensive range of services to managers and employees in SASA, all of which aim to resource the organisation with highly competent and effective people who are committed to serving the best interests of the South African sugar industry.

FACTS & FIGURES

TOTAL CANE/SUGAR PRODUCTION

TOTAL CANE/SUGAR PRODUCTION: 2005/2006 TO 2018/2019*

Season	Cane crushed (tons)	Saleable sugar produced		
		National Market (tons)	International Market (tons)	Total (tons)
2005/2006	21 052 266	1 261 808	1 238 696	2 500 504
2006/2007	20 278 603	1 340 524	886 329	2 226 853
2007/2008	19 723 916	1 399 657	873 842	2 273 499
2008/2009	19 255 404	1 438 587	821 657	2 260 244
2009/2010	18 655 089	1 412 273	766 177	2 178 450
2010/2011	16 015 649	1 583 457	325 779	1 909 236
2011/2012	16 800 277	1 685 312	137 176	1 822 488
2012/2013	17 278 020	1 701 731	249 785	1 951 516
2013/2014	20 032 969	1 543 264	800 386	2 343 650
2014/2015	17 755 537	1 649 056	458 617	2 107 673
2015/2016	14 861 401	1 573 504	46 826	1 620 330
2016/2017	15 074 610	1 534 741	4 998	1 539 739
2017/2018	17 388 177	1 190 281	795 434	1 985 715
2018/2019*	19 031 688	1 241 479	939 682	2 181 161

*estimates

SA SUGAR SALES/TONS: 2005/2006 TO 2018/2019*

Season	White sugar (tons)	Brown sugar (tons)	Direct sales (tons)	%	Industrial sales (tons)	%
2005/2006	1 112 153	215 640	810 017	61,0	517 776	39,0
2006/2007	1 121 273	224 297	771 216	57,3	574 354	42,7
2007/2008	1 121 263	241 292	784 293	57,6	578 263	42,4
2008/2009	1 162 113	264 949	822 224	57,6	604 838	42,4
2009/2010	1 191 342	307510	867 616	57,9	631 236	42,1
2010/2011	1 230 945	319 132	861 273	56,03	675 882	43,97
2011/2012	1 296 866	392 697	930 119	55,05	759 443	44,95
2012/2013	1 200 970	409 712	877 553	54,48	733 128	45,52
2013/2014	1 156 505	393 409	788 553	50,87	761 361	49,13
2014/2015	1 169 842	384 349	567 401	41,19	810 015	58,81
2015/2016	1 205 069	386 077	538 977	39,88	812 414	60,12
2016/2017	1 180 432	462 568	625 517	42,84	834 679	57,16
2017/2018	844 037	334 262	461 647	43,23	606 275	56,77
2018/2019*	864 255	447 228	575 745	49,45	588 666	50,55

*estimates

CROP DATA

CROP DATA: 2005/2006 TO 2018/2019*

Season	Yields				Yields per hectare of harvested cane (tons)	Rainfall June to May (mm)
	Sucrose % Cane	Tons cane to 1 ton sugar	Tons cane crushed	Tons sugar made		
2005/2006	13,74	8,40	21 052 266	2 507 203	66,02	921
2006/2007	12,92	9,07	20 278 603	2 235 287	66,36	982
2007/2008	13,47	8,64	19 723 916	2 281 765	64,17	1026
2008/2009	13,69	8,49	19 255 404	2 269 087	67,00	941
2009/2010	13,68	8,53	18 655 089	2 187 542	67,07	832
2010/2011	14,14	8,35	16 015 649	1 919 116	59,08	883
2011/2012	12,94	9,17	16 800 277	1 832 438	66,46	992,00
2012/2013	13,46	8,81	17 278 020	1 961 031	67,20	1 224,00
2013/2014	13,83	8,51	20 032 969	2 352 878	75,33	807,00
2014/2015	14,25	8,38	17 755 504	2 118 232	65,06	598,00
2015/2016	13,41	9,12	14 861 401	1 627 395	60,57	655,00
2016/2017	12,97	9,65	15 074 610	1 553 229	58,94	1 081,00
2017/2018	13,82	8,72	17 388 177	2 169 660	68,48	912,00
2018/2019*	13,86	8,67	19 031 688	2 190 661	74,944	

*estimates

RECOVERABLE VALUE AND CANE PRICES 2005/2006 TO 2018/2019*

Season	Recoverable Value✦	Cane (Rand per ton)
2005/2006	1 389,80	173,59
2006/2007	1 701,86	198,78
2007/2008	1 701,90	208,82
2008/2009	2 011,18	251,00
2009/2010	2 284,20	284,15
2010/2011	2 572,14	331,55
2011/2012	3 017,51	352,38
2012/2013	3 197,32	389,08
2013/2014	3 137,87	394,63
2014/2015	3 437,97	443,50
2015/2016	3 979,22	475,89
2016/2017	4 931,91	564,39
2017/2018	4 187,11	522,46
2018/2019*	3 701,61	466,36

✦The recoverable value is a measure of the rand value of the sugar and molasses that will be recovered from the sugar cane delivered by the individual grower.

SUGARCANE CRUSHED BY MILLS (TONS)

SUGARCANE CRUSHED: 2011/2012 TO 2018/2019*

REGION	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19*
NORTHERN IRRIGATED								
Malelane	1 658 943	1 556 390	1 685 846	1 655 413	1 718 777	1 327 829	1 312 874	1 597 041
Komati	2 358 719	2 075 805	2 360 039	2 330 859	2 183 539	1 713 307	1 896 859	2 362 678
Pongola	1 176 158	1 189 869	1 320 453	1 185 297	1 250 826	907 586	1 159 182	1 257 740
Total Northern Irrigated	5 193 820	4 822 064	5 366 338	5 171 569	5 153 142	3 948 722	4 368 915	5 217 459
ZULULAND								
Umfolozi	1 130 078	1 029 298	1 121 817	1 105 047	1 076 588	772 047	1 030 416	1 234 114
Felixton	1 705 537	1 464 812	2 088 930	1 877 159	1 571 884	1 556 670	1 670 459	1 793 981
Amatikulu	1 142 650	1 164 581	1 268 101	1 003 230	650 603	377 301	1 138 088	1 256 000
Total Zululand	3 978 265	3 658 691	4 478 848	3 985 436	3 299 070	2 706 018	3 838 963	4 284 095
NORTH COAST								
Darnall	876 867	915 110	1 064 473	860 544	0	834 418	866 923	1 037 171
Gledhow (KwaDukuza)	1 078 925	1 109 374	1 507 969	1 257 948	938 523	1 227 606	1 238 956	1 310 350
Maidstone	808 565	906 131	1 059 728	849 936	869 646	950 180	975 136	1 152 095
Total North Coast	2 764 357	2 930 615	3 632 170	2 968 428	1 808 169	3 012 204	3 081 015	3 499 616
MIDLANDS								
Eston	1 141 932	1 252 853	1 359 680	1 124 488	875 337	1 085 777	1 247 157	1 229 689
Noodsberg	1 088 697	1 425 584	1 467 088	1 326 214	1 083 751	1 356 427	1 375 221	1 485 659
UCL Company	643 533	746 706	696 049	712 257	587 168	721 550	800 773	811 667
Total Midlands	2 874 162	3 425 143	3 522 817	3 162 959	2 546 256	3 163 754	3 423 151	3 527 015
SOUTH COAST								
Sezela	1 989 673	1 668 931	2 062 966	1 755 129	2 054 759	2 069 201	2 091 272	1 909 484
Umzimkulu	0	772 576	969 830	711 983	0	174 711	584 861	594 019
Total South Coast	1 989 673	2 441 507	3 032 796	2 467 112	2 054 759	2 243 912	2 676 133	2 503 503
TOTAL	**16 800 277**	**17 278 020**	**20 032 969**	**17 755 504**	**14 861 401**	**15 074 610**	**17 388 177**	**19 031 688**

*estimates

DIRECTORY

SA SUGAR ASSOCIATION

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Cane Testing Service Managers

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Eston	J Gurney	PO Box 112, Eston 3740	031 781 2000
Felixton	N Kok	PO Box 1338, Empangeni 3880	035 772 3110
Gledhow	S Sathdeo	PO Box 55, Stanger 4450	032 437 4515
Maidstone	U Hemraj	PO Box 770, Umhlali 4390	032 944 2783
Mpumalanga	O Lourens	PO Box 1379, Malelane 1320	013 790 0230
Noodsberg	G Diack	PO Box 487, Wartburg 3233	033 503 1818
Pongola	D Bosman	PO Box 200, Pongola 3170	034 413 1215
Sezela	W Gillham	PO Box 224, Sezela 4215	039 975 2078
Umfolozi	C Coetser	PO Box 179, Mtubatuba 3935	035 550 0237
Umzimkulu	E Berry	PO Box 26639, Port Shepstone 4240	039 682 5122
Union	SP Love	PO Box 1, Dalton 3236	033 501 1600

Regional Managers

Mpumalanga	Malelane	J Schoeman	013 790 0320
	Komati	C Gemmell	013 723 4179
North Coast	Darnall/Maidstone/ Gledhow	B Nothard	032 947 0176
South Coast	Umzimkulu	M Kadwa	039 682 5122
	Sezela	W Gillham	039 975 2078
Zululand	Felixton	R Howes	035 772 3110
	Pongola	T Theunissen	034 413 1215
	Umfolozi	M Gina	035 550 0315
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SOUTH AFRICAN FARMERS DEVELOPMENT ASSOCIATION

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Grower Financing	A Buthelezi	abuthelezi@sa-fda.org.za
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SAFDA Farmer Support Officers

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Eston/Noorsberg	P Bhengu	pbhengu@sa-fda.org.za
Felixton	D Sithole	dsithole@sa-fda.org.za

Area	Name	Email
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Malelane	D Mthembu	dsithole@sa-fda.org.za
Pongola/ Makhathini	N Qwabe	nqwabe@sa-fda.org.za
Umfolozi	N Dlodlo	ndlodlo@sa-fda.org.za

SOUTH AFRICAN FARMERS DEVELOPMENT ASSOCIATION continued

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Pongola	M Mhlanga	mmhlanga@sa-fda.org.za
Malelane	M Mpanza	mmpaza@sa-fda.org.za
Mzimkhulu	N Tlale	ntlale@sa-fda.org.za

Provincial Manager

Area	Name	Email
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Mpumalanga	M Mkhabela	mmkhabela@sa-fda.org.za

GROCANE AGRICULTURAL FIRE INSURANCE PRIMARY CO-OP LTD

Physical Address	170 Flanders Drive, Mount Edgecombe 4302	Telephone	031 508 7161
Postal Address	PO Box 557, Mount Edgecombe 4300	Email	grocane@grocane.co.za

Chairman	CJ Alexander
Vice-Chairman	LA Arde
Field Manager	IM Stewart

SA SUGAR MILLERS’ ASSOCIATION NPC

KWA-SHUKELA

Physical Address	170 Flanders Drive, Mount Edgecombe 4300	Telephone	031 508 7300
Postal Address	PO Box 1000, Mount Edgecombe 4300	Email	sasmal@sasa.org.za

Chief Executive Officer	DP Rossler

SUGAR MILLING COMPANIES

GLEDHOW SUGAR COMPANY (PTY) LTD

Postal Address	PO Box 55, KwaDukuza 4450	Telephone	032 437 4400	Email	Caroline@gledhow.co.za

Directors	LW Riddle	PB McGrady	MM Mahlare	SG Dlamini
	Dr MP Sokhela	AD Goble	GO O’Connor	

Alternate	GC Heenan
General Manager	AL Francis

ILLOVO SUGAR (SOUTH AFRICA) (PTY) LTD

Physical Address	1 Nokwe Avenue, Ridgeside, Umhlanga Ridge 4319	Telephone	031 508 4300
Postal Address	PO Box 194, Durban 4000	Website	www.illovosugar.com

Chairman	M Makwana	
Managing Director	MM Mahlare	mmahlare@illovo.co.za
Finance Director	M Gounder	mgounder@illovo.co.za
Operations Director	–	
Commercial Director	M Nkala	Mnkala@illovo.co.za

Human Resources Director	C Mdletshe	cmdletshe@illovo.co.za
Growers Affairs Director	EA Brüggeman	ebruggemann@illovo.co.za
Corporate Affairs Director	SB Hlela	shlela@illovo.co.za
Company Secretary	JJ van Rooyen	jvanrooyen@illovo.co.za
Industry Affairs Manager	R L Richards	rorichards@illovo.co.za

ESTON MILL

Postal Address	Private Bag 2, Eston 3740	Telephone	031 781 8300

General Manager	P Nkosi	pnkosi@illovo.co.za
Administration Manager	P Naidoo	panaidoo@illovo.co.za
Agricultural Manager	G Shange	gshange@illovo.co.za

Factory Manager	L Haggie	lhaggie@illovo.co.za
Human Resources Manager	C Mdakane	cmdakane@illovo.co.za

NOODSBERG MILL

Postal Address	Private Bag X501, Dalton 3236	Telephone	033 502 9500

General Manager	J van Rensburg	jvrensburg@illovo.co.za
Administration Manager	C Hockley	chockley@illovo.co.za
Cane Supply Manager	J De Lange	jdlange@illovo.co.za

Factory Manager	C Moonsamy	cmoonsamy@illovo.co.za
Human Resources Manager	E Sibiya	esibiya@illovo.co.za

SEZELA MILL

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Factory Manager	M Sutton	msutton@illovo.co.za
Human Resources Manager	C Gwala	cgwala@illovo.co.za

UMZIMKULU MILL

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Administration Manager	A Fouché	afouche@illovo.co.za
Factory Manager	H van der Heever	nvdheever@illovo.co.za

Human Resources Manager	C Gwala	cgwala@illovo.co.za
Cane Supply Manager	I Massey	imassey@illovo.co.za

RCL FOODS SUGAR & MILLING (PTY) LTD

Head Office	PO Box 2734 Westway Office Park 3635
Telephone	031 242 8600
Website	www.rclfoods.com

Managing Director – Sugar & Milling	JM du Plessis

KOMATI MILL

Postal Address	PO Box 69, Komatipoort 1340
Telephone	013 723 4860

Manufacturing Executive – Sugar	P van Greunen

MALELANE MILL

Postal Address	PO Box 47, Malelane 1320
Telephone	013 791 1000

Manufacturing Executive – Sugar	L Govender

PONGOLA MILL

Postal Address	PO Box 23, Pongola 3170
Telephone	034 413 8100

Manufacturing Executive – Sugar	A Williamson

TONGAAT HULETT SUGAR SOUTH AFRICA LIMITED

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Postal Address	Private Bag 3, Glenashley 4022	Website	www.huletts.co.za		

Managing Director (SA)	Vacant
TH Executive	DL Marokane
TH Internal Consultant	BG Dunlop
Milling Executive Director	D van den Berg

Executive Director – Technology Management	DM Meadows
Executive Director – Human Resources (SA)	JD Bhana
Executive Director – Business Services (SA)	Vacant
TH Executive – Cane Rural Development	SJ Saunders

TECHNOLOGY GROUP

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Head of Engineering	R Govender
Head of Sugar Technology	Vacant

Head of Technology Development	Dr CJ Jensen
Head of Operations Support	S Peacock

TONGAAT HULETT SUGAR – REFINERY

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General Manager	M Moodley
Engineering Manager	D Dlamini

Human Resources Manager	TM Campbell
Financial Manager	M Naidoo
Technical Manager	N Padayachee

TONGAAT HULETT SUGAR – MARKETING, SALES AND DISTRIBUTION

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General Manager – Marketing	PM Dickinson
Marketing Manager	Z Sithole
Trade Marketing Manager	R Zwane

National Sales Manager – Industrial	E Nkambule
Human Resources Manager	TM Campbell
Warehousing and Distribution Manager	M Mayola

VOERMOL FEEDS (PTY) LTD

Postal Address	PO Box 13, Maidstone 4380	Telephone	032 439 5856	Email	madelaine.penn@tongaat.com

Managing Director	PT Strydom
Technical Manager	Vacant

Business Services Manager	Vacant
Human Resources Manager	MD Cele

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General Manager	PW Russell
Land Reform Manager	S Shabalala

Business Services Manager	M Ngcobo
Human Resources Manager	A Nkabane

AMATIKULU MILL

Postal Address	Private Bag Amatikulu 3801	Telephone	035 331 9000	Email	letticia.nzuza@tongaat.com

General Manager	M Ninela
Production Manager	S Zuma
Cane Supply and Transport Manager	D Beath

Engineering Manager	M Sithole
Human Resources Manager	B Lane

FELIXTON MILL

Postal Address	Private Bag X02, Felixton 3875	Telephone	035 791 5000	Email	nontando.brown@tongaat.com

General Manager	P Masinga
Production Manager	W Dlamini
Cane Supply and Transport Manager	B Robertson

Engineering Manager	C Lewis
Human Resources Manager	BV Lane

DARNALL MILL

Postal Address	PO Darnall 4480	Telephone	032 439 9111	Email	glenda.bailey@tongaat.com

General Manager	N Sharma
Production Manager	S Maharaj
Supply Chain Manager	J Mhlungu

Engineering Manager	O Selaletse
Human Resources Manager	K Nxele

MAIDSTONE MILL

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General Manager	CN Soji
Production Manager	
Mill Manager	A Bindoff

Supply Chain Manager	C Naidoo
Engineering Manager	M Nzama
Human Resources Manager	K Nxele

UCL COMPANY (PTY) LTD

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Chairman	CE Klipp
Chief Executive Officer	RB Lütge
Chief Marketing Officer	M van der Merwe
General Manager Agri Services	FM Eggers
General Manager Manufacturing	C Vermeulen

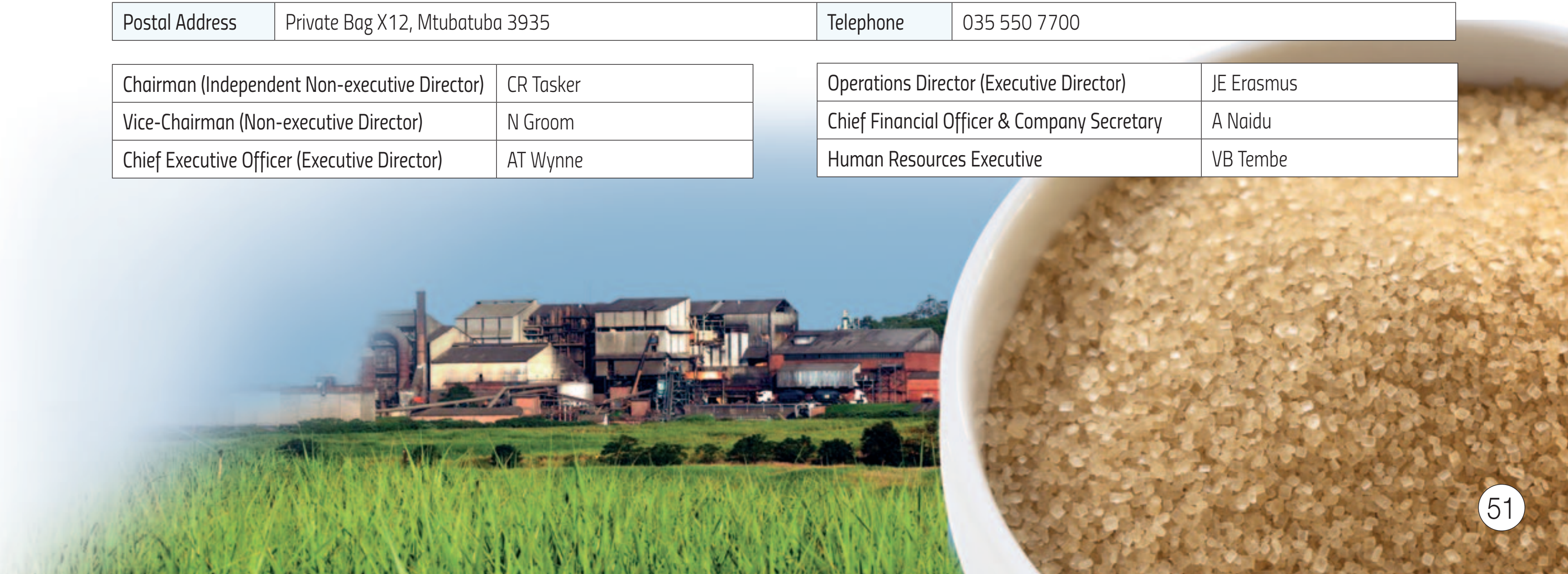
General Manager Sawmilling & Subsidiaries	S Casey
Chief Financial Officer	H Tredoux
Production Manager	TK Kistan
Engineering Manager	R Van Zyl
Human Resources Executive	A de Vries

UMFOLOZI SUGAR MILL (PTY) LTD

Postal Address	Private Bag X12, Mtubatuba 3935	Telephone	035 550 7700

Chairman (Independent Non-executive Director)	CR Tasker
Vice-Chairman (Non-executive Director)	N Groom
Chief Executive Officer (Executive Director)	AT Wynne

Operations Director (Executive Director)	JE Erasmus
Chief Financial Officer & Company Secretary	A Naidu
Human Resources Executive	VB Tembe



MILL GROUP BOARDS				
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Felixton	N Kok	PO Box 1338, Empangeni 3880	035 772 3110	mgb@fca.org.za / admin@fca.org.za
Gledhow	R Jeevanath	PO Box 55, Kwa-Dukuza 4450	032 437 4515	rmunien@Gledhow.co.za
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Pongola	A Stock	PO Box 200, Pongola 3170	034 413 1215	astock@bundunet.co.za
Sezela	H Mcleod	PO Box 224, Sezela 4215	039 975 2078	heather@scga.co.za
UCL Company	S Love	PO Box 26639, Port Shepstone 4240	033 501 1600	loves@ucl.co.za
Umfolozi	C Coetser	PO Box 179, Mtubatuba 3935	035 550 0135	mgb@wpd.co.za / umfcane@wpd.co.za
Umzimkulu	E Berry	PO Box 26639, Port Shepstone 4240	039 682 5121	berrye@telkomsa.net

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Factory Support Manager	S Madho

Research & Development Manager	SB Davis
Finance & Administration Manager	GA Hart-Jones

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President	GT Smith	Vice President	CM Baker

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Secretaries	South African Sugar Millers' Association NPC

NATIONAL BARGAINING COUNCIL FOR THE SUGAR MANUFACTURING AND REFINING INDUSTRY

Postal Address	PO Box 472, Mount Edgecombe 4300	Telephone	031 508 7331/2

Chairman	EV Nene	Secretary	Y Motala
Vice-Chairman	L Mthobisi		

THE S.A. SUGAR JOURNAL—April, 1940

Sugar Technologists in Congress

A Successful Conference

Dr. E. P. Hedley elected President

SOUTH AFRICAN SUGAR JOURNAL

THE OFFICIAL ORGAN OF THE SOUTH AFRICAN SUGAR ASSOCIAT

See page 231 for our competition.

DELICIOUS KING'S CUP TEA THERE'S NOTHING "JUST AS GOOD."

The South African Sugar Journal

Vol. 14

DURBAN, APRIL 30, 1930.

No. 4

GEORGE FLETCHER & CO., LTD.

SOUTH AFRICAN AGENTS:
ASSOCIATED ENGINEERS' CO., LTD.
TOWER BUILDINGS,
WEST STREET, DURBAN

DERBY,
ENGLAND.
RESIDENT ENGINEER
R. C. CARTIN

CANE LEVEL

HISTORICAL HIGHLIGHTS

1848	Edmund Morewood plants the first sugarcane on the KwaZulu-Natal North Coast
1853	First shipment of KwaZulu-Natal sugar to the Cape
1861	Indentured workers from India arrive
1865	First black owned steam mill at American Board of Missions station at Amanzimtoti
1896	Locusts destroy 40% of sugarcane crop
1900	Sugar output reaches 16 000 tons per annum with 30 mills in operation and 2 600 hectares under sugarcane
1910	Natal Sugar Association formed
1916	Agricultural News and Sugar Planters Gazette launched (Sugar Journal)
1920	Natal Sugar Millers' Association founded
1925	South African Research Institute – formerly Experiment Station – established
1927	South African Cane Growers' Association formed
1936	Sugar Act promulgated and first Sugar Industry Agreement published
1937	South Africa becomes foundation member of the first International Sugar Agreement with quota of 209 000 tons
1939	Annual production reaches 475 000 tons with 23 factories operating and 145 000 hectares under cane
1945	Variety NCo310, with more than 40% more sucrose than other varieties, released by SASA
1949	Sugar Milling Research Institute and Grocane Fire Insurance Co-operative Limited established
1950	First bulk shipment of 5 750 tons of raw sugar
1953	South Africa joins post-war International Sugar Agreement (ISA)
1955	Variety NCo376 released by SASA – the dominant variety over the next 40 years
1961	South Africa leaves British Commonwealth but negotiates new bilateral agreement to supply Britain 150 000 tons annually
1962	New markets developed in Canada and Japan
1964	Bilateral agreement with Britain terminated.
	South African Sugar Millers' Association registered – formerly Natal Sugar Millers' Association
1965	Bulk Sugar Terminal erected with storage capacity of 180 000 tons
	Sugar Industry Trust Fund for Education launched
1968	First N variety of cane – bred and selected in Natal – released by SASA
1973	SASA launches Small Growers' Financial Aid Fund with R5m grant
1974	Industrial Training Centre opened
1975	Domestic consumption reaches one million tons
1981	Bulk Sugar Facility established in Gauteng for domestic market
1983	Severe drought cuts production by 750 000 tons
1984	Price Stabilisation Fund borrowings reach R327 million
	Cane transport scheme transfers cost responsibility to growers
	Quarantine glasshouse moved from Botanic Gardens to Mt Edgecombe
1985	A and B pool systems introduced Record sugar production of 2,370 million tons
1986	Political sanctions lead to loss of Canadian and USA markets
1987	Small-scale grower production exceeds 1,5 million tons (worth R51m)
	Floods disrupt mills and cane areas in KwaZulu-Natal
1988	N21 released – first eldana resistant variety
1989	R1 m project to expand industry production by 300 000 tons
1990	Industry proceeds exceed R2 billion for one season
1991	USA quota restored at 2,3% equating to 26 000 tons per annum
1992	First year of four-year drought reduces production to 1,5m tons
	Small Grower Development Trust launched
1993	Drought in 1993/94 season reduces production to 1,171m tons
1994	Introduction of phased deregulation programme
	Sugar Industry Central Board disbanded
1995	Drought restricts production to 1,67m tons in 1995/96
	R12 million Siyakha programme launched by President Mandela
1996	Production increases to 2,2m tons
1997	Illovo Sugar Ltd consolidates its leading position in southern Africa with the acquisition of Lonrho's sugar division for R1,62 billion
1998	Pools system of sucrose payments ends
1999	Record crop in 1998/99 at 2,646 m tons of sugar SASA, growers and millers move to KwaShukela in Mt Edgecombe
2001	Record crop in 2000/2001 at 2,729 million tons of sugar Launch of Umthombo Agricultural Finance (formerly Financial Aid Fund)

2002 SA chairs the International Sugar Organisation (ISO) for the first time

ISO Council held in Durban in May 2002

2003 Record crop of 2,763 tons of sugar

2004 Industrial Training Centre (ITC) changes name to Shukela Training Centre (STC)

Illovo Sugar Ltd sells Gledhow Mill to a black empowerment group

South African Sugar Experiment Station (SASEX) changes name to South African Sugarcane Research Institute (SASRI)

Inkezo Land Company established

2005 Illovo Sugar Ltd sells Umfolozi Mill to a black empowerment group – Umvoti Transport Ltd

SASA purchases 25% share in Maputo Sugar Terminal

2006 Highest world sugar price in twenty-five years

Opening of STAM Terminal in Maputo

Sugar Journal turns 90 years old

2007 The 2006/07 season dips to the lowest level in 10 years with 2,226 million tons of sugar

2008 Shukela Training Centre changes from a division of SASA to a wholly owned subsidiary of SASA now called Shukela Training Centre (Pty) Ltd

SASA appointed as the implementing agent for a KZN Government fertiliser project whereby R60 million of fertiliser is distributed to embattled KZN small scale growers

2009 The 2009/2010 season production drops further to a 15-year low of 2,178 million tons of sugar

The world raw sugar market price reaches a 29-year high of 30.33 US c/lb2010

Sugar production for 2010/11 season drops to 1,909 million tons

150th Year Commemoration of the arrival of Indian people in SA

2012 National Minister of Land Reform and Rural Development commends industry on the transfer of 21% of freehold land under sugarcane production to black growers

2013 The lack of an effective tariff for several years sees sugar imports of some 350 000 tons per annum, displacing SA sugar and threatening the industry's sustainability

2014 The Dollar Based Reference Price is reviewed after six years and set at US$ 566 per ton, up from US$ 358 per ton gazetted in 2008. Deep sea imports have slowed somewhat

2015 Drought takes its toll on the industry as the 2015/2016 crop drops to 1,634 tons sugar making it the lowest crop since 1995 when drought restricted production to 1,667 tons sugar

2016 Low world price and ineffective import protection results in significant increase in deep sea imports into South Africa. The International Trade Administration Commission reviews the methodology of tariff protection, reducing the effective duty on sugar

2017 Over 500 000 tons of deep sea imports enter South Africa, SASA makes urgent appeal to government departments for assistance

2018 With support from the Department of Trade and Industry and the Department of Economic Development, SASA makes an urgent application to the International Trade Administration Commission to review the Dollar-Based Reference Price to stop the flood of imports. Over 2000 industry stakeholders, mainly small-scale black farmers, march to Pretoria in support of the application. In August 2018, a new DBRP of $680 is gazetted

On 9 October 2018 the government gazettes the notice for transitional provisions in terms of the Sugar Act 1978. Signed by Dr Rob Davies, Minister of Trade and Industry, the notice amends the Constitution of the South African Sugar Association (SASA); and the Sugar Industry Agreement, and is effective from 1 April 2018.
As a result SASA now has three members – the South African Sugar Millers' Association, South African Farmers Development Association and South African Cane Growers' Association

SASRI PUBLICATIONS LIST

INFORMATION DISTRIBUTED BY THE SOUTH AFRICAN SUGARCANE RESEARCH INSTITUTE

Please contact the Librarian at 031 508 7514 or write to:
The Librarian, South African Sugarcane Research Institute,
Private Bag X02, Mount Edgecombe 4300.
Email: library@sugar.org.za

All publications are available in printed and e-versions.

Books

- Understanding and Managing Soils in the South African Sugar Industry
- Identification and Management of Soils of the SA Sugar Industry

Booklets

- Careers in Sugarcane Agriculture
- IPM for Eldana Control
- Plant Breeding – Crossing and Selection Programmes
- SASRI Visitors' Guide
- Pest and Disease Identification Pocket Guide
- Annual RD&E Feedback Booklets
- Izithombe eziwumhlahlandlela ekulimeni umoba (Illustrative Guide to Sugarcane Farming)

Technical Guides (Updated annually)

- Herbicide Guide
- Mechanisation Reports

Information Sheets

Newsletters

- Ingede (Zulu Newsletter)
- The Link

SASRI Poster Series

SASRI Annual Progress Report

Technical Manuals

- Guidelines and Recommendations for Eldana Control in the South African Sugar Industry
- Green Manuring
- Manual of Seedcane Production
- Sugarcane Diseases in southern Africa
- Weeds of the South African Sugar Industry
- Integrated Weed Management of Creeping Grasses in Sugarcane

WEBSITE

For further information visit the SASRI Website: **http://www.sasri.org.za**

SASA