

AFMA & SA FEED INDUSTRY

**De Wet Boshoff
SAGNET**

15 May 2017

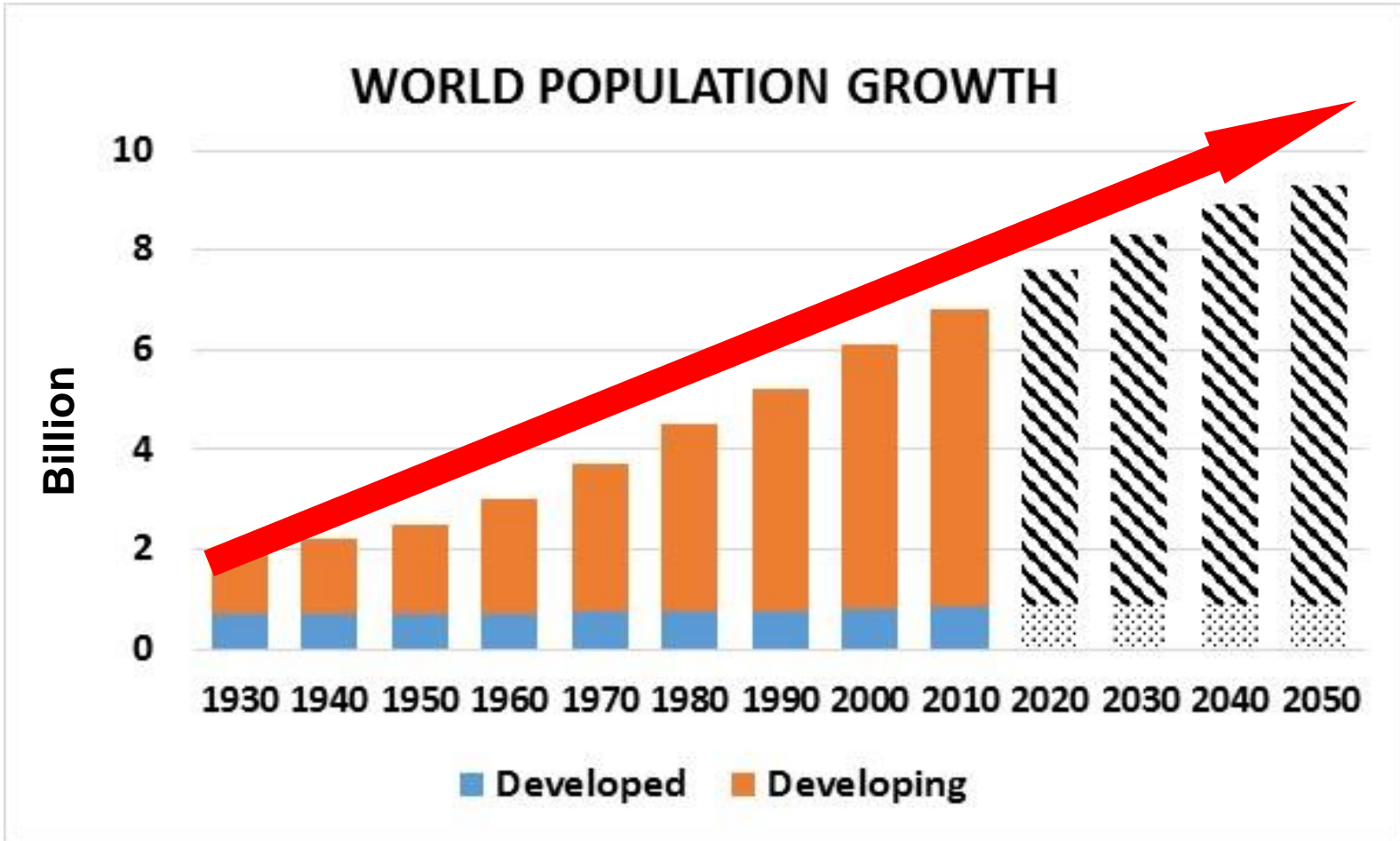


OUTLINE OF PRESENTATION:

- **INTRODUCTION & BACKGROUND**
- **DEVELOPMENT**
- **PROFILE & ROLE**
- **CHALLENGES**
- **FUTURE VISION**



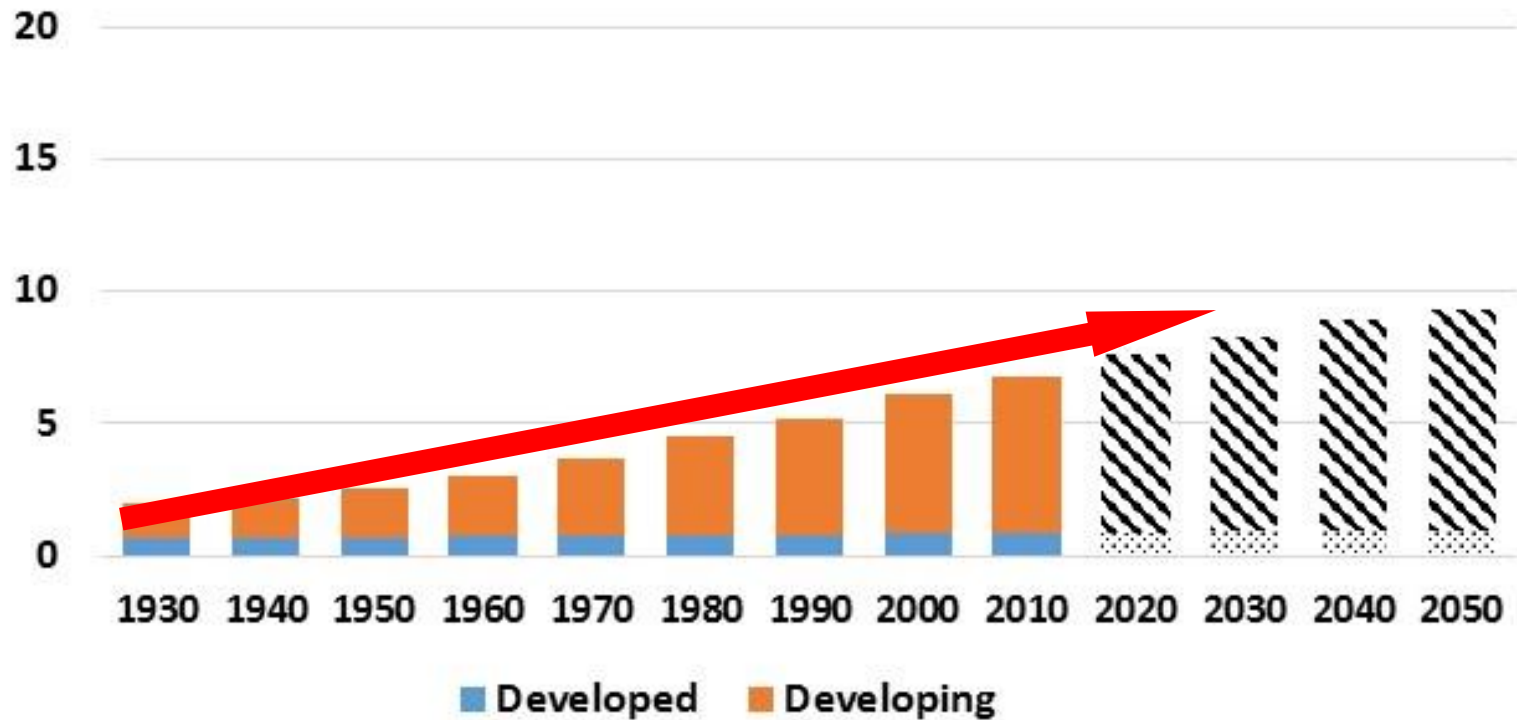
World Population Growth



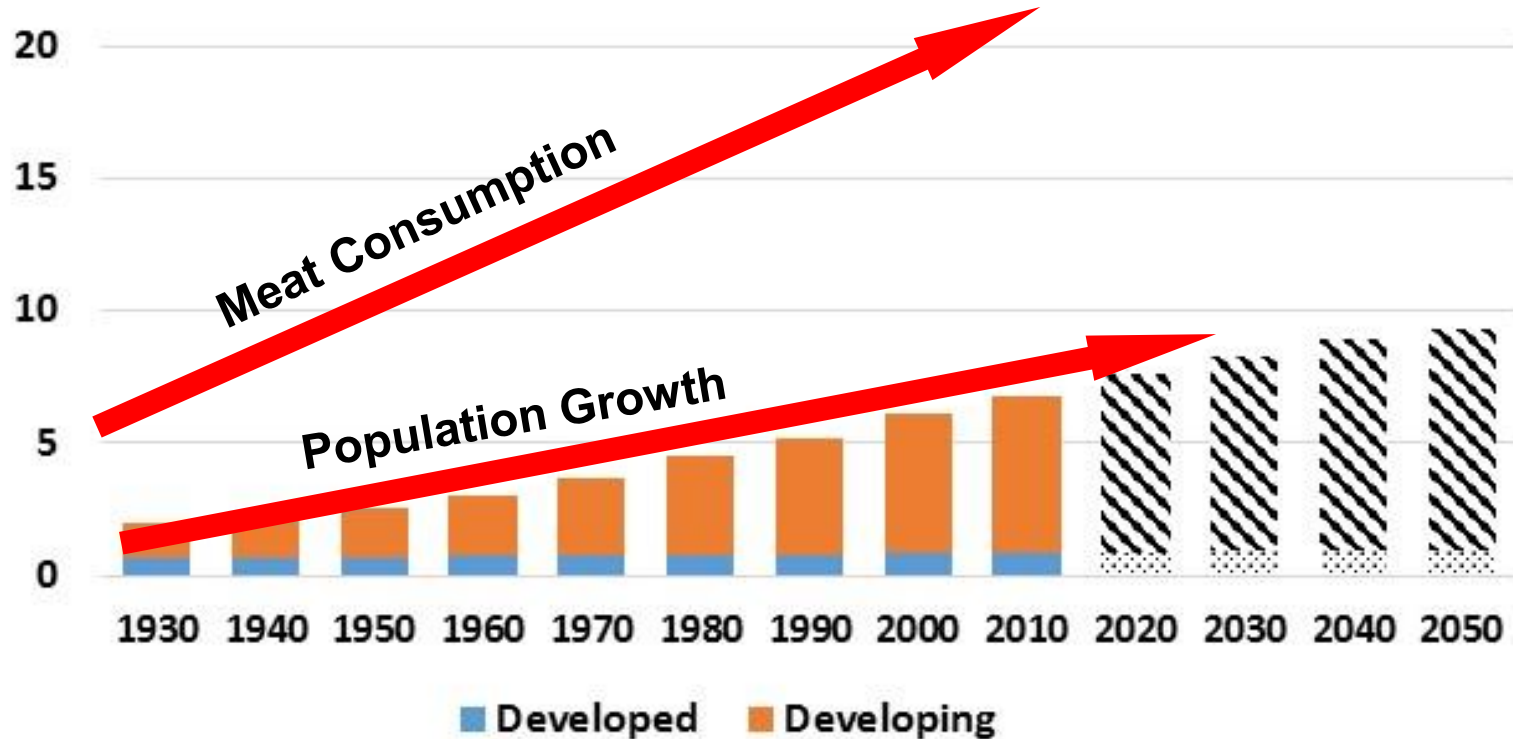
Source: IFIF



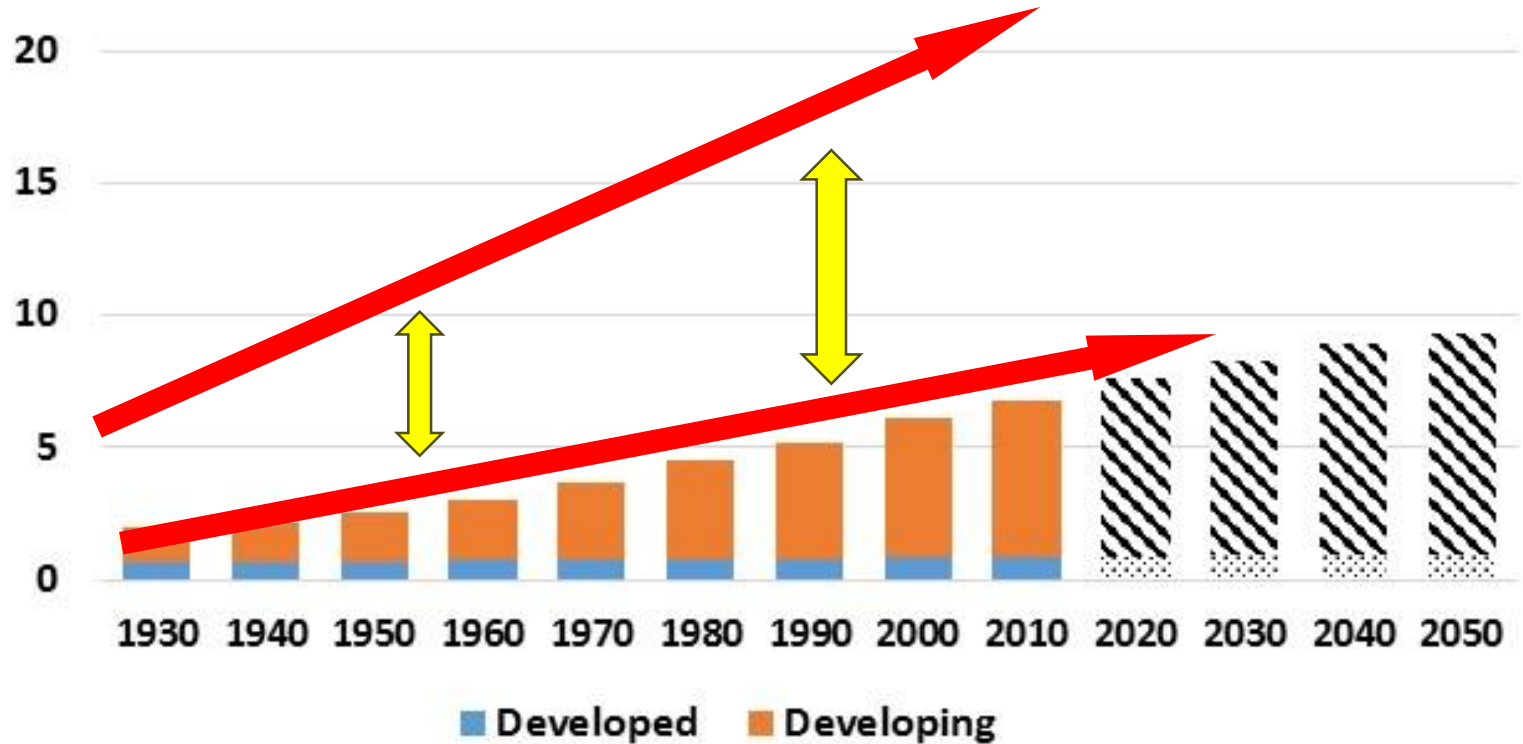
WORLD POPULATION vs GROWTH IN MEAT CONSUMED



WORLD POPULATION vs GROWTH IN MEAT CONSUMED



WORLD POPULATION vs GROWTH IN MEAT CONSUMED



**VISION: STRIVES TO DEVELOP PROFITABLE INDUSTRY THAT
ACTS RESPONSIBLY IN THE FOOD CHAIN**

- **Feed man. started after 1930's**
- **Lion Bridge – 1935**
- **Officially formed in 1945 and known as the
“Compound Feed Manufacturers”**



“FIRST BULK FEED DELIVERIES”



FEED DELIVERY – “BAGGED FEEDS”



MODERN FEED MILLS



MODERN FEED DELIVERY



**VISION: STRIVES TO DEVELOP PROFITABLE INDUSTRY THAT
ACTS RESPONSIBLY IN THE FOOD CHAIN (Cont.)**

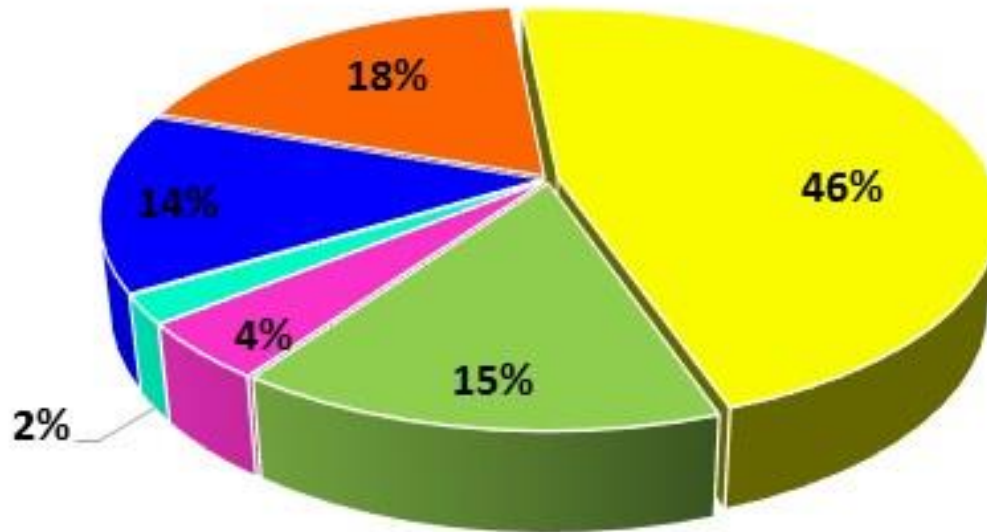
- **Transformed in 1988 – “Animal Feed Manufacturers Association”**
- **AFMA – Art 21 Company, not for gain – financed by membership levy.**
- **AFMA represents the Formal feed industry.**



- **AFMA's 150 members include the following:**
 - **Full members (Feed Manufacturers) - 71**
 - **Associate members (Supply to Industry) - 79**
 - **Traders**
 - **Premix Manufacturers**
 - **Producer suppliers**
 - **Equipment Suppliers**
 - **Other**
- **SADC – Members**



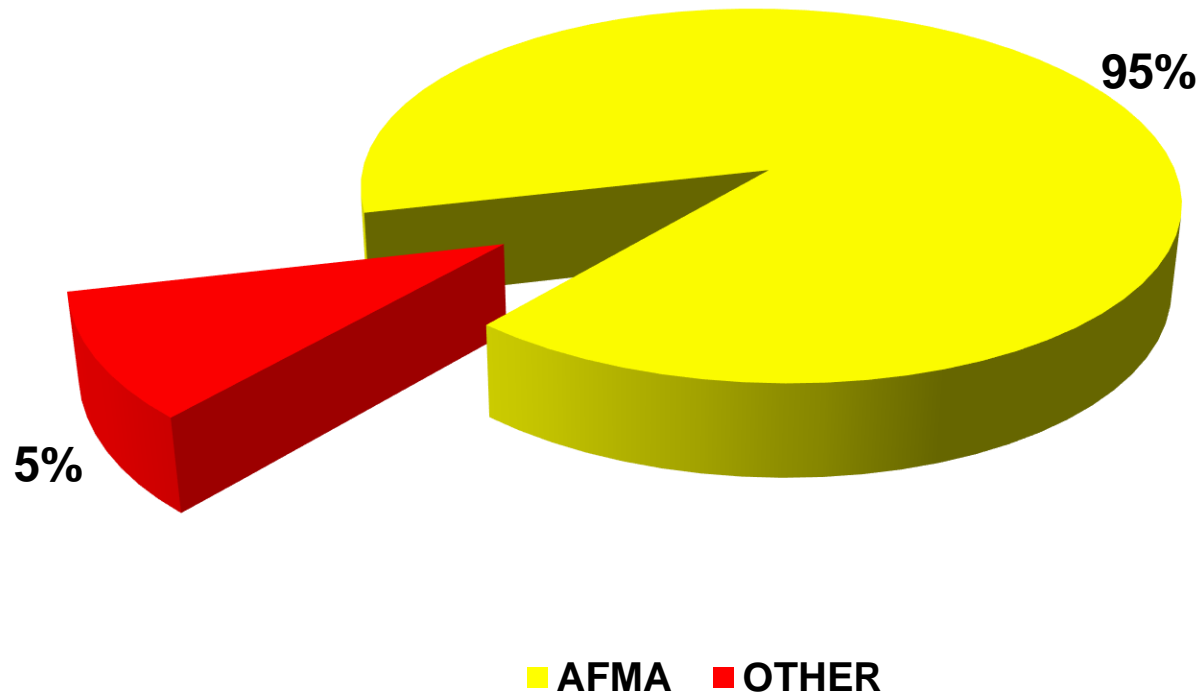
AFMA FEED SALES - 2015/16



■ DAIRY ■ BEEF & SHEEP ■ BROILERS ■ LAYERS ■ PIGS ■ OTHER



SA FEED PRODUCTION FOR RE-SALE 2015/16



NATIONAL FEED PRODUCTION 2015/16

- **AFMA members:** **± 7.2 mil tons - 62%**
 - **SA Feedlots (B & S) :** **± 2.2 mil tons - 19%**
 - **Pig Producers:** **± 0.6 mil tons - 5%**
 - **Dairy Farmers:** **± 1.1 mil tons - 9%**
 - **Other manufacturers:** **± 0.6 mil tons - 5%**
- ▶ **Gross Turnover Value of +/- R 50 Billion**



GROWTH IN ANIMAL FEED SALES (AFMA) (Tons)

• 2007/08	5 158 785	10.1%
• 2008/09	5 262 693	2.0%
• 2009/10	5 499 331	4.5%
• 2010/11	5 750 578	4.6%
• 2011/12	6 142 821	6.8%
• 2012/13	6 176 152	0.5%
• 2013/14	6 431 328	4.1%
• 2014/15	6 714 004	4.9%
• 2015/16	7 183 107	2.9%



BUSINESS MODEL



AFMA Board of Directors

Technical
Committee

Trade
Committee

Marketing &
Promotion
Committee

Skills
Development
Committee

Legal
Committee

Information
Committee



INTERNATIONAL LINKS

C O D E X A L I M E N T A R I U S
International Food Standards



World Health Organization



Food and Agriculture Organization of the United Nations



World Health Organization



INDUSTRY SELF REGULATION

- ▶ **AFMA CODE OF CONDUCT**
- ▶ **AFMA TRANSPORT PROTOCOL**



INDUSTRY SELF REGULATION

AFMA CODE OF CONDUCT

- ▶ **ALL LEGAL REQUIREMENTS**
- ▶ **ALL AFMA MEMBERS (FULL + ASS.)**
- ▶ **3rd PARTY CERTIFICATION**
 - ▶ **EXTERNAL COMPLIANCE AUDITORS**
 - ▶ **INTERNATIONAL ACCREDITED**
 - ▶ **LOCAL COMPANY**





AFMA

SAFE FEED FOR SAFE FOOD

CODE OF CONDUCT COMPLIANCE





International
Food
Industry
Federation



4th
global feed
and food congress
South Africa 2013

8 to 12 April 2013
Sun City, South Africa

safe feed & food for all



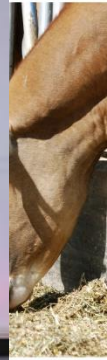
AFMA FORUM 2016



AFMA

SAFE FEED FOR SAFE FOOD

Animal Feed Manufacturers Association









Future Focus (Strategic)

- **Facilitate and Overcome challenges - Maize**
- **Feed Registrations on time**
- **AFMA Feed Registration Service (FRS)**
- **AFMA Code of Conduct - Modernisation**
- **SA's Feeds Bill Process – on track**
- **Research & Training Feed Mill – AFMA / UP**





Future Vision - Regional

- **Regional Feed Association (SAFMA)**
- **All inclusive legislative framework**
- **Regional Feed Legislative Equivalence – SADC**
- **Regional Food Value Chain Integration – SADC**
 - **Grain producers**
 - **Storage & handling**
 - **Feed role players**
 - **Food role players**
- **Increased Regional Trade and Coop.**



Thank you !!

