OUTLINE OF PRESENTATION:

- INTRODUCTION & BACKGROUND
- DEVELOPMENT
- PROFILE & ROLE
- CHALLENGES
- FUTURE VISION
World Population Growth

Source: IFIF
WORLD POPULATION vs GROWTH IN MEAT CONSUMED


- Developed
- Developing
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
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: 18%
- Beef & Sheep: 14%
- Broilers: 2%
- Layers: 15%
- Pigs: 46%
- Other: 2%

AFMA SAFE FEED FOR SAFE FOOD
Animal Feed Manufacturers Association
SA FEED PRODUCTION FOR RE-SALE
2015/16

AFMA
OTHER

95%
5%
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)

<table>
<thead>
<tr>
<th>Year</th>
<th>Tons</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007/08</td>
<td>5,158,785</td>
<td>10.1%</td>
</tr>
<tr>
<td>2008/09</td>
<td>5,262,693</td>
<td>2.0%</td>
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<tr>
<td>2009/10</td>
<td>5,499,331</td>
<td>4.5%</td>
</tr>
<tr>
<td>2010/11</td>
<td>5,750,578</td>
<td>4.6%</td>
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<tr>
<td>2011/12</td>
<td>6,142,821</td>
<td>6.8%</td>
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<tr>
<td>2012/13</td>
<td>6,176,152</td>
<td>0.5%</td>
</tr>
<tr>
<td>2013/14</td>
<td>6,431,328</td>
<td>4.1%</td>
</tr>
<tr>
<td>2014/15</td>
<td>6,714,004</td>
<td>4.9%</td>
</tr>
<tr>
<td>2015/16</td>
<td>7,183,107</td>
<td>2.9%</td>
</tr>
</tbody>
</table>
INTERNATIONAL LINKS

CODEX ALIMENTARIUS
International Food Standards

World Health Organization
FAO of the United Nations

IFIF
Feed the world
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
Future Focus (Strategic)

- Facilitate and Overcome challenges - Maize
- FeedRegistrations 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 !!