

VOL 6 NO 3 • AUGUST 2026

agbiz GRAIN
QUARTERLY

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Wheat prices and marketing windows

Leading above the line: Workplace fears

Electricity tariffs hit the grain and silo sectors

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Published on behalf of

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Seeds of tomorrow: Cultivating innovation for a resilient agricultural future

By Dr Lukeshni Chetty, CEO, SANSOR

My career in the seed industry started with my studies at the University of the Free State, where I received my PhD in Genetics. My appointment as deputy director of Genetically Modified Organisms (GMO) Monitoring and Research at the South African National Biodiversity Institute entailed developing a GMO post-commercial monitoring framework for South Africa.

This prepared me well for my appointment at the South African National Seed Organisation (SANSOR), where I am responsible for the overall strategic objectives of the organisation, including capacity development in the seed sector, intellectual property protection, and policy development that supports innovation and global seed trade initiatives. I also represent South Africa's seed industry interests, especially seed trade, nationally and internationally.

The seed industry has long been recognised as the foundation of agriculture. Every harvest begins with a seed, and within every seed lies the remarkable potential to nourish communities, sustain economies, and safeguard the future of food production. Facing an era defined by unprecedented environmental, economic, and social challenges, the role of the seed sector has never been more significant.

Adapt and innovate

The sector operates in a highly complex environment. Climate change is altering rainfall patterns and intensifying extreme weather such as droughts and floods, while the emergence and spread of new pests and diseases continue to threaten crop production. At the same time, the global population continues to grow, placing greater pressure on agricultural systems to produce more food, feed, fibre, and fuel using fewer natural resources. Producers are expected to increase productivity while reducing their environmental footprint, conserving

biodiversity, protecting water resources, and contributing to more sustainable production systems.

These challenges demand bold thinking, collaborative action, and continuous innovation. The latter has always been at the heart of the seed industry. Generations of plant breeders have worked tirelessly to develop improved varieties that deliver higher yields, enhanced quality, improved resilience, and greater resistance to pests and diseases. Today, scientific advances are accelerating this progress at an unprecedented pace. From molecular breeding and advanced phenotyping to digital technologies and artificial intelligence, innovation is transforming the way improved seed varieties are developed and delivered to producers.

Among these advances, precision breeding represents one of the most promising tools available to modern agriculture. It offers plant breeders the ability to make precise, targeted improvements within a plant's own genetic makeup, allowing desirable traits to be developed more efficiently than through conventional breeding alone. This technology has the potential to make crops more resilient to drought, heat stress, emerging diseases, and evolving pest pressures while improving nutritional quality and resource use efficiency. In addition, precision breeding complements conventional breeding by providing breeders with an additional tool to address some of agriculture's most pressing challenges.

The responsible adoption of innovative breeding technologies is not simply about scientific progress; it is about building resilience. It is about equipping producers with varieties capable of performing under unpredictable climatic conditions. It is about strengthening food security in a world where production systems are under mounting pressure. It is about supporting environmental sustainability through crops that use water and nutrients more efficiently and require



Dr Lukeshni Chetty.

fewer crop protection interventions. Above all, it is about ensuring that agriculture is productive, profitable, and sustainable for generations to come.

Striking a balance

Innovation cannot succeed in isolation. A thriving seed industry depends on collaboration between researchers, breeders, seed companies, regulators, policymakers, producers, universities, and international partners. Science-based regulatory frameworks, effective intellectual property systems, strong phytosanitary measures, and open dialogue between public and private stakeholders all play a critical role in creating an environment where innovation can flourish.

It is also important to maintain public confidence through transparency, responsible stewardship, and evidence-based decision-making that balances innovation with safety and sustainability.

Within the pages of this issue, readers will discover stories of industry leadership, policy developments, market trends, and role-players in the grain storage and handling sector whose dedication continues to move the sector forward. The future of agriculture will be shaped by role-players who embrace innovation responsibly, investing in science, and strengthening collaboration across the value chain. [a](mailto:lukeshni@sansor.co.za)

For more information, send an email to Dr Lukeshni Chetty at lukeshni@sansor.co.za

Information being gathered for TRIM RFI

Agbiz Grain is currently liaising with various industry role-players to gather information regarding rail volumes used by its members. Industry bodies consulted include Grain SA, Sacota, the National Chamber of Milling (NCM) and the Animal Feed Manufacturers Association (AFMA). Agbiz Grain received 'in-scope' confirmation from the Competition Commission in December last year to proceed with the gathering of information. This came after Transnet in 2025 announced its intention to split Transnet Freight Rail into two entities, the Transnet Rail Infrastructure Manager (TRIM) and TRF which will function as an independent network operator.

TRIM representatives met with Agbiz, Sacota, and Agbiz Grain in July last year to discuss industry's buy-in in the process and provide more information regarding the opportunity for value chain role-players to bid for slots and operate branch lines effectively. The goal of the information-gathering exercise by Agbiz Grain is to map the potential flow of grain from Agbiz Grain member silos to mills, feed mills, and harbours using interactive maps. This will assist in identifying viable rail lines as part of the response to the request for interest (RFI) for the so-called B-lines of the South African railway network. – *Agbiz Grain*

Progress with SHEQ audit

The development by Agbiz Grain of a safety, health, environmental, and quality (SHEQ) audit tailored to the unique aspects of the grain handling and storage sector, is based on five pillars comprising a standards document, an audit questionnaire, an audit standard operating procedure, the audit process, and monitoring and evaluation. The first draft of the SHEQ standards has been approved by the Agbiz Grain advisory committee, and the first version of the audit questionnaire is currently in its final draft stage.

Pilot audits will be done at depots in September this year. Audits will address issues such as pest control, contractor management, construction work, emergency preparedness, SHEQ training records, and various other aspects. The audit-system will assist Agbiz Grain members in ensuring a safe working environment and minimising risks to food safety. – *Agbiz Grain*

Grain SA deeply disappointed by JSE decision

Grain SA said in a statement it is deeply disappointed by, and disagrees with, the decision by the Johannesburg Stock Exchange (JSE) not to retain the multiple reference point model for calculating soya bean location differentials and to revert to a single reference point system. The JSE's decision is set out in its *Market Notice* on the outcome of the multiple reference points model pilot.

Grain SA, together with independent scientists and technical specialists, invested significant time and resources in developing and testing an alternative methodology supported by independent scientific research, market data and practical analysis. This methodology sought to achieve a more equitable and accurate matching of demand to supply.

Grain SA said it cannot support the proposed return to a single reference point, nor the relocation of that reference point, without a comprehensive and transparent assessment of the potential financial consequences for producers across all soya bean-producing regions. The organisation will submit detailed comments on the proposal and will continue to advocate for a location differential methodology that is transparent, evidence-based and equitable to all market participants. – *Press release*

New hub boosts small farmer incomes

Thousands of smallholder grain farmers in Burundi are gaining improved access to formal markets through a partnership between TradeMark Africa (TMA) and the Netherlands that is helping them secure better prices, improve transparency in agricultural trade, and create new rural employment opportunities.

The initiative centres on the Umva Business Centre (UBC), an aggregation and marketing facility facilitated by TMA with funding from the Netherlands. The centre links farmers directly with verified buyers through a structured trading system that incorporates transparent weighing, quality inspections, digital transaction records, and prompt payments.

Every bag delivered to the centre is inspected for quality, each kg is weighed individually, and every transaction is digitally recorded through the Umva collection application. Farmers receive receipts immediately, while payments are made the following day, improving confidence in a market where transactions were previously opaque. – *Farmers Review Africa*



Far East buyers drive demand for South African maize

South Africa expects to harvest a record 17,3 million tonnes of maize this season. However, farmers had harvested and delivered only 27% of the crop to commercial silos by late June after heavy rains delayed field work. Despite the slower pace, the crop quality remains better than last season.

Export activity has continued to improve as more maize reaches the market. During the week ending 19 June, South Africa exported 113 775 tonnes of maize. Vietnam received 76% of the shipments, while South Korea accounted for 11%. African countries received the remaining volumes.

The stronger demand from Far East buyers marks a change from the previous marketing year, when African countries led South Africa's export market. Zimbabwe bought almost half of the two million tonnes exported during the 2025 to 2026 marketing year, which ended in April 2026.

Since the start of the 2026 to 2027 marketing year in May, Far East countries have taken about 72% of the 607 228 tonnes of maize exported by South Africa. Analysts say buyers continue to favour South African maize because of its good quality, low moisture levels from natural sun drying, and competitive pricing. – *Milling Middle East & Africa*

Changes to Australian phosphine regulations

Australian grain role-players have been warned that changes to workplace exposure limits for phosphine, due to take effect from 1 December 2026, could significantly disrupt the grains supply chain and restrict insect management options. Phosphine is a chemical fumigant used to treat all types of pests in stored grain and commodities. It is the only widely available and cost-effective chemical treatment of its kind, with industry estimating phosphine is used to treat about 90% of stored grain in Australia.

Under current workplace health and safety regulations, Australian grain must not exceed a phosphine threshold limit value – time weighted average (TLV-TWA) of 0,3 parts per million (ppm). This is based on safe exposure levels for an individual working an eight-hour day over a five-day week.

As part of a broader review of chemical exposure limits, Safe Work Australia will reduce the workplace threshold for phosphine exposure to 0,05ppm from 1 December under the *Workplace exposure limits for airborne contaminants* regulation. The proposed threshold would be the lowest of its kind globally. – *Grain Central*

Ukraine may need additional storage for grain

Ukraine may require additional storage capacity for ten to 12 million tonnes of grain if export delays persist, agriculture minister Taras Vysotskyi said, adding that the current disruption to Black Sea shipping differs fundamentally from the full-scale blockade seen in 2022.

According to the minister, Ukraine's record monthly export volume without using deep-water ports was about 3,5 million tonnes, a level the country could theoretically reach again.

Vysotskyi said Ukraine currently has sufficient grain storage capacity for the expected harvest of spring crops. Harvesting started later than usual because of weather conditions, and farmers have not yet reached the midpoint of the campaign. A large maize harvest is expected this autumn, but storage capacity is still considered adequate at this stage. – *Latifundist.com*

Bangladesh to raise food grain storage capacity

The government has set a target to increase Bangladesh's public food grain storage capacity to 3,4 million metric tonnes over the next five years, despite maintaining food reserves well above the country's current safety threshold. Officials said the Ministry of Food has already begun implementing measures to achieve the expanded grain storage capacity, in line with the government's commitment to strengthening national food security.

Data from the Directorate General of Food show that public warehouses currently hold 1,96 million tonnes of rice, 295 689 tonnes of wheat, and 168 605 tonnes of paddy, while floating rice reserves stand at 8 735 tonnes.

During the first 23 days of the 2026-27 fiscal year, Bangladesh imported 320 800 tonnes of food grains. Public-sector imports accounted for 11 650 tonnes, while the private sector imported 309 150 tonnes, according to official data. – *Daily Sun* 

Leading above the line: How fear shapes workplace behaviour

By Lizelle Jacobs, MindAlive

One of the most common questions leaders ask me at the start of their leadership development journey is why managing people can feel so challenging. They often describe situations with a similar underlying theme: Team members are not taking full responsibility for execution, or they seem unwilling to go the extra mile. No combination of engagement strategies, one-on-one meetings, or Friday *boerewors braais* seems to move the needle in the right direction.

Yet when I engage with teams and explain the dynamics of healthy leadership, they often ask whether the same training will be provided to their managers as well. Over time, I have realised that, despite the considerable effort invested in leadership development and engagement strategies, there is often a gap between what managers do and what team members need. This is in many ways a human pattern and becomes easier to understand when viewed through the lens of neuropsychology.

The above-/below-the-line practice is a tool I use to help leaders and teams recognise their behaviour, understand the choices available to them, and intentionally change their responses for greater impact. The 'line' represents fear. When we are above the line, we may still experience fear, but we can notice it, name it, and choose not to let it unconsciously affect our behaviour. When we are below the line, fear takes control of our behaviour, often without us even realising it.

Above/below the line in practise

Below the line, our behaviour typically falls into one of three roles, namely hero, villain, or victim. These roles align with psychologist Dr Stephen Karpman's Drama Triangle, first developed in 1968. Above the line, the corresponding roles are creator, challenger, and coach, as described by David Emerald in *The Power of TED (The Empowerment Dynamic)*.

To bring this concept to life, consider a typical workplace scenario. It is peak intake season at the grain silo. A conveyor fault has been logged three times over two weeks – each instance minor enough for production to continue, yet significant enough to warrant escalation through the maintenance team's reporting channel. However, the issue is not escalated.

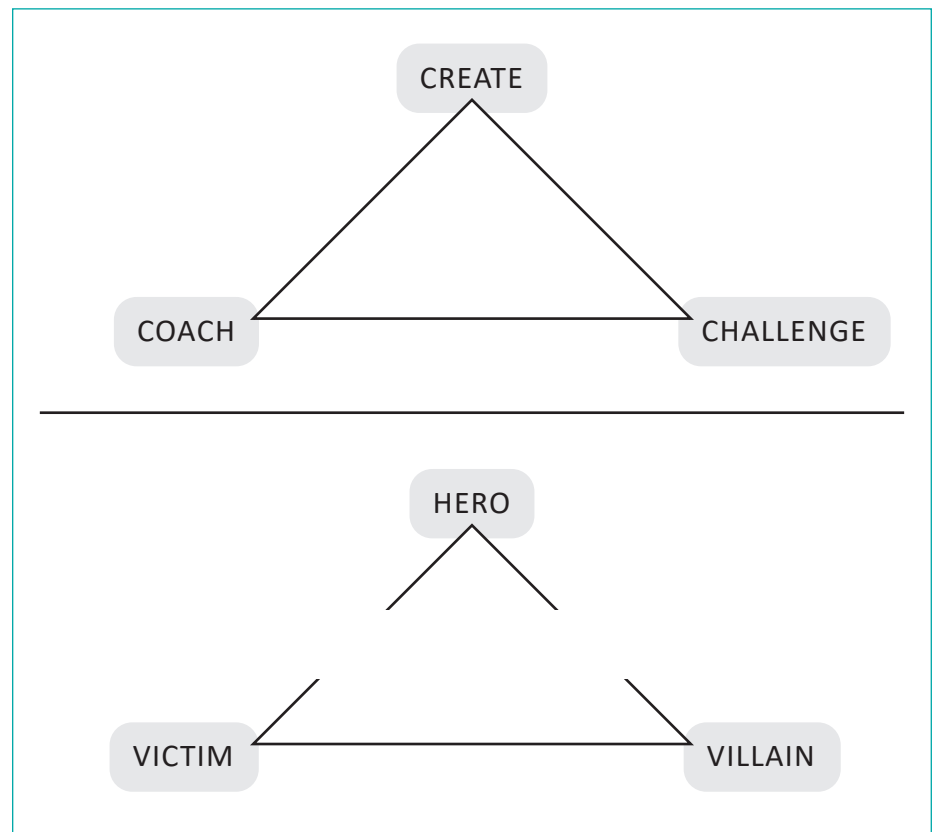
The depot manager begins checking it himself, heading straight for that conveyor every morning. He identifies the fault before it becomes a problem but says nothing to the maintenance team about the pattern because he is too busy. By week three, the conveyor fault is under control, but the fault-detection system remains broken. His maintenance team

has learned, not from any instruction but from his silence, that his morning walkthrough will catch what they miss.

The hero position

This is what Dr Karpman described as the hero position in the drama triangle. The leader absorbs the problem rather than addressing the pattern. The intention may be helpful, but the effect is that the people best placed to improve the system are never required to do so. Brené Brown's *Strong Ground* framework describes this as operating below the line: a state triggered not by poor leadership intent, but by the same threat response that makes it feel easier, in the moment, to fix the issue yourself than to have a direct conversation about why it keeps happening.

Figure 1: The above-/below-the-line practice. (Source: Brené Brown, *Strong Ground*, 2025)



To operate above the line, the leader could choose a different response. During the next walkthrough, instead of checking the conveyor, he could stop and ask the maintenance supervisor: "This fault has been logged three times without being escalated. What is getting in the way?" The focus shifts from blame to pattern recognition. The leader is challenging the pattern, not attacking the person.

He might then ask the supervisor to redesign the escalation step: "What would make it easier to detect and escalate early?" At that point, the leader is coaching. Within a month, two faults are detected and escalated without the leader's intervention. The conveyor is no longer his responsibility in the mornings, because it never should have been.

Do not operate from fear

The critical shift is awareness – in other words, noticing, naming, and pausing before responding. When enough people begin practising this, it becomes a culture changer. In many organisational cultures, it feels more acceptable, and even safer, to express anger than to acknowledge fear, sadness, or vulnerability.

Fear often presents itself as anger, and anger can manifest in many workplace behaviours, such as sarcastic comments, scathing remarks, personal attacks, or threatening requests. This is what happens when leaders move into the villain role in the drama triangle to achieve quick results. The short-term outcome may be compliance, but the long-term cost is a breakdown of trust and a team that quietly does less to protect itself.

Another important observation is that victims are rarely recruited into teams; more often, they quietly move into that role because leaders predominantly operate from the hero position. These leaders may describe their behaviour as servant leadership, but rescuing and over-functioning are not the same as serving.

The trust issue

When leaders continually step in, they send an unintentional message – the team will not be trusted to prove what it can do. Over time, the leader stops trusting the team's capabilities because those capabilities have never been tested.

The underlying message becomes: "I am the most competent person here, and I am the one who can be trusted to make the hard decisions".

The result is a team that struggles to make decisions and avoids responsibility. This fuels the leader's frustration and reinforces the belief that building a high-performance team is difficult, when in reality, the leader may be sustaining the very dynamic they want to change.

Leading above the line is not about becoming a flawless leader or removing fear from the workplace. It's the willingness to interrogate your thinking and intent, and to know when you operate from fear. I realise I am below the line when I say things like: "I'll do it myself. I care more. I'm on my own here". From here, I can say something to myself like: "I am scared out of my mind. What if it's not perfect? Take it easy, Lizelle; you can be scary when you are scared". Are you able to do the same? [a](#)

For more information, contact
Lizelle Jacobs at 082 877 4461.

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Reflecting on the Agbiz Student Case Study Competition

By Dr Charl van der Merwe

The first Agbiz Student Case Study Competition was held during the 2012 Agbiz Congress. Among the participants in that inaugural competition was the current Agbiz chief economist and presidential envoy on agriculture and land, Wandile Sihlobo, illustrating the long-term value of investing in the next generation of agricultural leaders.

Since its inception, the competition has reflected Agbiz's commitment to developing future agricultural economists, policymakers and industry leaders by providing a platform where students can develop practical solutions to real-world issues, challenge conventional thinking, engage in evidence-based debate, and present their findings to delegates representing the agricultural industry.

This year's competition, held in June during the Agbiz Congress, challenged students to address one of South Africa's most pressing agricultural issues: the long-term sustainability and competitiveness of the country's wheat industry. This topic is also the focus of a Section 7 Committee investigation by the National Agricultural Marketing Council (NAMC).

Participants and winners

Students from six universities – the University of Pretoria, Stellenbosch University, North-West University, the University of Fort Hare, and the University of the Free State – participated under the expert guidance of Dr Melissa van der Merwe and Prof Johan van Rooyen of Stellenbosch University. They were

tasked with analysing the structural challenges facing the wheat value chain and developing practical, evidence-based policy recommendations.

Group 2, comprising Katlego Ledwaba, Ayanda Mbotho, Ona Ndelu and Mia Louw, took top honours at the competition, winning Best Presentation. Ruben Fourie received the award for Best Team Player, while Guillaume Oberholster was recognised as Best Speaker. Special recognition was also awarded to Ona Ndelu and Mia Louw for their outstanding presentation skills.

The presentations delivered by the four finalist groups demonstrated excellent research, a strong understanding of agricultural economics, and an appreciation of the delicate balance between producer sustainability, food security, and market efficiency.

Although each team approached the challenge from a different perspective, several common themes emerged, highlighting opportunities to strengthen South Africa's wheat sector through improved policy design, market coordination, and pricing mechanisms.

Understanding the challenge

South Africa is a net importer of wheat, with around half of domestic consumption supplied through imports. The area planted to wheat has declined drastically over the past three decades, from around 1,6 million ha during the 1990s to around 550 000ha in 2026.

As the cornerstone of domestic wheat production, the Western Cape accounts for around 73% of the national crop. Maintaining the viability of wheat farming in this region is therefore critical, not only for food security but also for rural employment, downstream industries, and the agricultural economy as a whole.

Students identified several factors contributing to this trend, including rising input costs, more unpredictable weather conditions, geopolitical developments, and pricing mechanisms that many producers believe no longer adequately reflect current market realities. The students also emphasised that maintaining a viable wheat industry is not merely about food security – it is also about preserving the economic vitality of wheat-producing regions.

Rethinking the wheat tariff system

One of the most frequently discussed topics was South Africa's variable wheat tariff system. Students explained that while the existing tariff mechanism was designed to protect local producers against periods of low international wheat prices, its effectiveness is often diminished by the time required for administrative approvals and implementation. Because tariffs are activated only after a series of procedural steps, a frequent delay between market movements and the application of tariff adjustments is common.

Several teams proposed an automatic tariff adjustment system modelled on South Africa's monthly fuel price methodology. Under this approach,

the existing tariff formula would remain unchanged, but adjustments would occur automatically according to predetermined rules and a transparent calculation process. The students argued that such a system could improve predictability and transparency while



Participating students in the 2026 Agbiz Student Case Study Competition with co-facilitators Dr Melissa van der Merwe (left) and Prof Johan van Rooyen (right).

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reducing implementation delays and maintaining current policy objectives. Another recommendation focussed on the reference price used in the tariff calculation. Students noted that the current reference price is based on calculations developed several years ago. They questioned whether periodic reviews could ensure that the mechanism continues to reflect prevailing international market conditions.

Better timing of wheat imports

Another recurring theme centred on the timing of wheat imports. The students acknowledged that imports remain essential to meeting domestic demand. However, they argued that the scheduling of import deliveries could be improved to reduce unnecessary pressure on local markets during the harvesting season.

Several presentations highlighted that imported wheat often arrives during the Western Cape harvest period (October to December). According to the students, this overlap increases market supply precisely when local producers are marketing their crop, placing downward pressure on prices. The proposed approach would seek to maintain reliable wheat supplies for millers and consumers while imports would complement, rather than directly compete with, locally harvested wheat.

Modernising wheat pricing

The teams also gave considerable attention to South Africa's wheat pricing system and the operation of the Johannesburg Stock Exchange (JSE) wheat contract. One area of discussion involved the current Randfontein reference point used to calculate location differentials. Students argued that because most Western Cape wheat never moves to Randfontein, some producers regard the existing system as disconnected from actual grain movement patterns. Several alternative approaches were presented.

One proposal recommended replacing the single reference point with a multi-reference point system that incorporates regional milling demand, transport costs, storage infrastructure, and actual grain flows. Students suggested that this could better reflect physical market realities and improve pricing fairness across production regions.

Another presentation explored the possibility of relocating the pricing



Group 2 delivered the best team presentation in the 2026 Agbiz Student Case Study Competition. From the left are Prof Johan van Rooyen, Katlego Ledwaba, Ayanda Mbotho, Ona Ndelu, Mia Louw, and co-facilitator Dr Melissa van der Merwe (right).

reference point closer to the country's primary wheat production and import areas. Various options were evaluated, including Cape Town Harbour and more centrally located inland alternatives. While acknowledging that any changes would require industry consultation and detailed economic analysis, students argued that updating the location differential methodology could improve pricing efficiency and better reflect today's wheat supply chain.

Looking beyond benchmarks

Students also questioned whether South Africa's traditional reliance on Kansas wheat futures is the most appropriate international pricing benchmark. Given the changing origins of South Africa's wheat imports, several teams suggested that future pricing frameworks could consider incorporating additional international reference markets that better reflect actual trade flows.

Rather than replacing existing systems outright, students proposed diversified pricing benchmarks to strengthen market relevance while preserving transparency and risk management functionality. Some teams suggested developing a broader national wheat supply and demand model that integrates domestic production, international markets, imports, and consumption patterns to support future policy decisions.

Collaboration: The common thread

Perhaps the strongest message emerging from the competition was that no single intervention can address the challenges facing the wheat industry. Whether discussing tariffs, imports, pricing or logistics, every team recognised the importance of collaboration across the value chain.

Several groups proposed stronger coordination between producers,

grain traders, millers, bakers, policymakers, and regulators to improve information sharing, planning, and market transparency. Such collaboration, they argued, would help ensure that policy decisions balance producer sustainability, consumer affordability, and national food security.

Policy interventions, the students emphasised, should be designed to balance multiple objectives simultaneously, ensuring producer profitability, affordable food for consumers, competitive milling industries, and South Africa's long-term food security.

The value of fresh perspectives

As South Africa continues to navigate global market uncertainty, climate variability and changing trade patterns, innovative thinking will become even more important. While not every proposal may ultimately be adopted, the competition illustrated the value of encouraging young professionals to engage with complex agricultural policy questions.

The students demonstrated an impressive ability to combine academic research with practical industry considerations, producing recommendations that stimulated thoughtful discussion among delegates attending the Agbiz Congress. The competition also confirms, based on the presentations, that the future of agricultural leadership and agricultural economics is in capable hands.

Disclaimer: This article summarises the student presentations delivered within an academic environment intended to encourage debate and develop opportunities. The views presented do not necessarily reflect the official positions of Agbiz or Agbiz Grain. ^a

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Wheat prices and marketing windows

By Ruben Fourie and Dr Charl van der Merwe

Concerns regarding the sustainability of South Africa's wheat industry were raised during a special meeting of the Wheat Forum Steering Committee in October 2025. Following this meeting, the National Agricultural Marketing Council (NAMC) was requested to conduct a formal Section 7 investigation into the wheat industry.

As part of Agbiz Grain's preparation for the Section 7 investigation, an analysis of wheat prices since the introduction of the free-market system in South Africa (2000) was undertaken. Monthly price data for the JSE/Safex December Wheat Futures Contract, supplied by Frikkie Barnard of AFGRI in Moorreesburg, were analysed for the period 2000 to 2026; the data was grouped into three

sub-periods, namely 2000 to 2009, 2010 to 2019, and 2020 to 2026.

Wheat price data

The monthly average price of the JSE/Safex December Wheat Futures Contract was used to calculate a monthly price index, with the average price for the marketing season (January to December) used as the base value (index = 100).

Table 1: Monthly average wheat price index from 2000 to 2025. (Source: Agbiz Grain)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2000			102,3%	98,8%	99,4%	99,5%	99,4%	99,3%	98,1%	98,3%	102%	107,6%
2001	93,8%	96,5%	94,8%	93%	93%	94,1%	95,8%	97%	97,1%	103,1%	116,7%	138,1%
2002		95,7%	96,4%	101,1%	97,6%	99,4%	102,2%	104%	109,3%	105,5%	94,7%	86,9%
2003		93,3%	96,6%	96,5%	96%	99,1%	101,7%	107,2%	103,2%	100%	102,1%	97,5%
2004		117,6%	113,5%	109%	108,4%	101,6%	94,6%	98,4%	97,4%	94,2%	90,7%	86,5%
2005		101,2%	98,6%	97,6%	100,3%	104,3%	103,6%	98,1%	97,4%	100,2%	101,4%	97,3%
2006		89,3%	88,6%	86,6%	88%	94,2%	99,3%	102,3%	106,6%	117,1%	113%	109%
2007	71,4%	74,3%	79,4%	80,1%	81,7%	89,2%	96,4%	108,8%	127,4%	121,2%	112,9%	122,1%
2008	84,9%	99%	114,1%	107,9%	108,8%	114,8%	110,6%	108,7%	98,8%	90,8%	79,1%	74,9%
2009		110,3%	112,1%	106,7%	110,5%	109,3%	103,5%	95,7%	90,1%	90%	89,9%	87,3%
2010	92,1%	91,2%	89,1%	90,6%	93,7%	94,8%	98,5%	108,8%	111,7%	107,2%	108,8%	113,5%
2011	104,9%	108,5%	100,1%	102,1%	104,2%	101,1%	95,1%	99,4%	101,6%	97,1%	95%	91,3%
2012		85,2%	83,7%	84,6%	88,8%	92,2%	104,7%	107,8%	107,8%	110,5%	114,1%	111,2%
2013	102,2%	98,3%	96,7%	95,9%	98%	100,4%	98,8%	98,9%	99,4%	102,1%	104,6%	106,2%
2014	97,4%	98%	101,8%	102,7%	102,3%	98,5%	97,2%	99,4%	99,9%	99,4%	100,2%	104,5%
2015			93,3%	92,5%	94,2%	94,5%	95,7%	100,5%	101,9%	103,8%	109,3%	113,2%
2016		103,8%	105,1%	102%	108,9%	109,2%	104,5%	96,5%	94,3%	94,9%	91,3%	90,1%
2017				102%	103,1%	100,5%	94,6%	98,8%	97,7%	102%	102,9%	97,4%
2018		87,4%	90%	92,7%	93,3%	96,3%	100,5%	105,4%	108,6%	108%	104,2%	103,6%
2019	102%	100,8	99,1%	97,4%	98,1%	98,7%	99,3%	103,2%	101,9%	101,7%	98,3%	98,6%
2020	92,7%	92,9%	96,3%	101,9%	102%	100,7%	100,8%	102,4%	102,5%	104,5%	104,1%	99,1%
2021	91,2%	93,4%	94,5%	93%	93,6%	93,3%	96%	102,5%	104,3%	109,4%	115%	116,8%
2022	86,1%	86,1%	94,3%	97,5%	110%	106,8%	105%	101,7%	102,7%	107,9%	102,1%	98,4%
2023	103,5%	106,4%	101,1%	102,7%	102,4%	101,3%	99,6%	101,3%	98,7%	97,4%	93,6%	93,3%
2024	99,7%	97,8%	98,4%	100,6%	105,1%	104%	100,7%	101,6%	99,1%	98,6%	97%	96,3%
2025	99,3%	100,5%	102,1%	102,6%	103,4%	102,7%	102,8%	102,1%	98,1%	96,8%	94,9%	94,3%

The resulting monthly index values are presented as a heat map (Table 1), where shades of red indicate index values above 100 and shades of blue indicate values below 100. This provides a visual representation of relative price performance throughout the year.

A strike-rate analysis was then conducted to determine the percentage of years in which the monthly price index exceeded 100. For example, a strike rate of 50% indicates that, during a specific sub-period, the price for that month exceeded the seasonal average in half of the years. The strike rate for the three sub-periods is presented in Figures 1 to 3.

Figure 1 shows that, during the 2000 to 2009 period, only July, August, October, and November recorded strike rates of 50% or higher, with November recording the highest strike rate of 60%.

During the 2010 to 2019 period (Figure 2), the strike rate for March declined to 30%. April, May, and June remained unchanged from the previous decade at 40%. August maintained a strike rate of 50%, while October and November increased to 70%. December also exceeded the 50% strike rate, recording 60%.

The results for the 2020 to 2026 period (Figure 3) reveal a notable shift in seasonal price patterns. April recorded a strike rate above 50%, while May increased to 80%. August achieved a strike rate of 100%. September, October, and November each recorded strike rates of 50%, whereas December declined sharply to 20%.

Precision marketing

Heleen Viljoen, senior economist at Grain SA, highlighted the importance of precision farming at the production level during the 10 October meeting. Precision farming relies on technologies such as GPS, sensors, drones, and satellite imagery to collect data. This information is analysed and interpreted to optimise crop production by improving input efficiency (variable rates), reducing production costs, increasing yields, minimising environmental impact, and supporting informed farm management decisions.

Yield is one element of the farm production value equation, and price the other. This raises an important question: If precision farming is essential for maximising production, should precision

Figure 1: Strike rate for 2000 to 2009. (Source: Agbiz Grain)

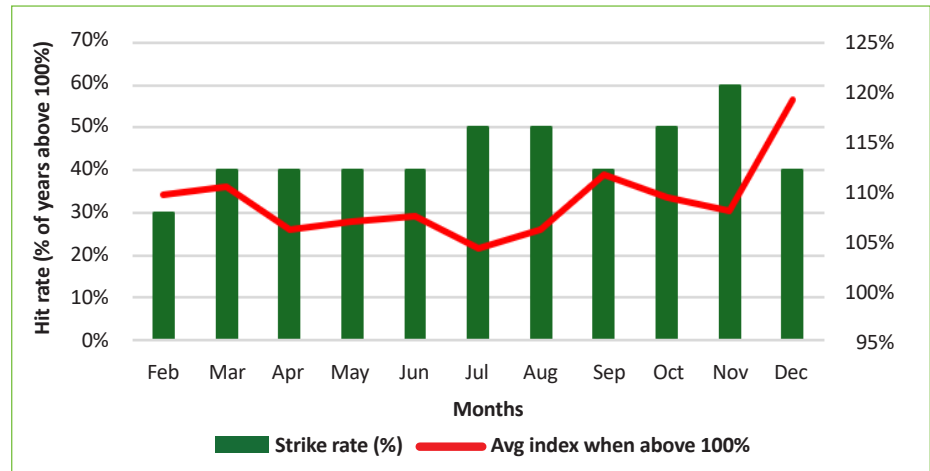


Figure 2: Strike rate for 2010 to 2019. (Source: Agbiz Grain)

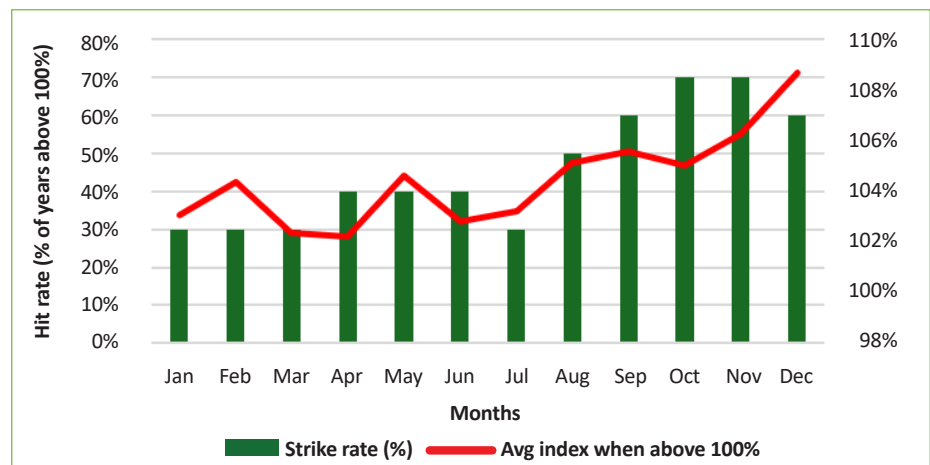
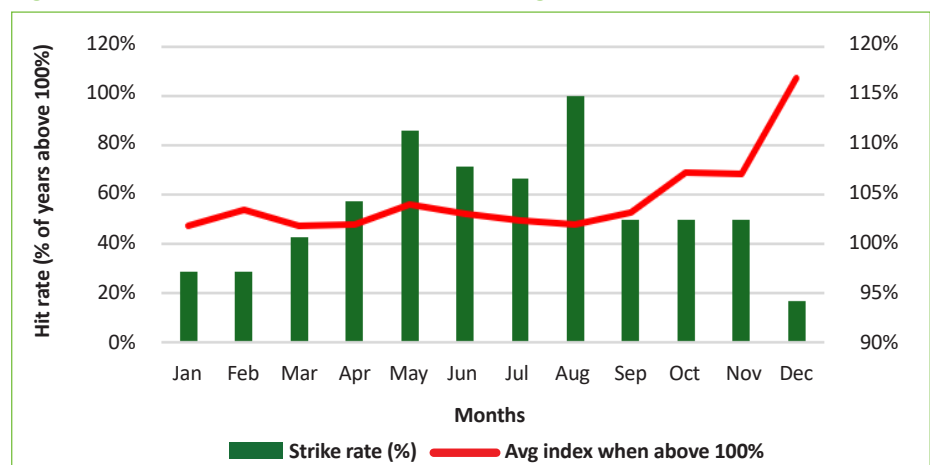


Figure 3: Strike rate for 2020 to 2026. (Source: Agbiz Grain)



marketing not be equally important for maximising profitability? Precision marketing may include developing pricing and marketing strategies that focus on utilising opportunities within certain selling windows. A selling window represents the optimal timeframe to sell based on prevailing market prices,

seasonal trends, supply and demand dynamics, and price outlook, to maximise revenue and profitability.

Pricing and marketing strategies

Neither the index values presented in Table 1 nor the strike-rate results shown in Figures 1 to 3 revealed a distinct

selling window. As a result, it was difficult to identify a clear pricing strategy based solely on these results. Following the introduction of South Africa's free-market agricultural marketing system in the late 1990s, the one-third marketing strategy became a widely adopted approach to managing price risk.

Under this strategy, one-third of the expected crop is priced during or immediately after the planting period. A further one-third is marketed during the growing season, once crop conditions are better understood and the first production estimates become available. This typically coincides with the fungicide application period in August. The remaining one-third is marketed after harvest, when the actual crop size and quality are known. The principal marketing periods in this strategy are therefore May (planting), August (crop development and fungicide application), and November/December (harvest).

As Table 1 and Figures 1 to 3 did not identify a clear selling window, the one-third marketing strategy was evaluated using the information presented in the table and figures alongside several alternative marketing strategies commonly employed by producers. The following is a summary of the strategies considered:

- Scenario A: 100% pricing during December.
- Scenario B: 1/3 during planting, 1/3 during spraying, 1/3 during harvesting.
- Scenario C: 40% in May, 40% in August, and 20% in December.
- Scenario D: 100% pricing during August.

Table 2: Net production value (Rm) per pricing strategy. (Source: Agbiz Grain)

	Scenario A	Scenario B	Scenario C	Scenario D	Scenario E	Scenario F
2000 to 2009	18,46	18,83	18,90	19,36	18,95	19,86
2010 to 2019	37,64	37,08	36,96	37,31	37,21	33,72
2020 to 2025	35,00	35,94	35,93	35,94	35,75	35,90

Table 3: The ranking of the strategies per sub-period (Source: Agbiz Grain)

	Scenario A	Scenario B	Scenario C	Scenario D	Scenario E	Scenario F
2000 to 2009	6	5	4	2	3	1
2010 to 2019	1	4	5	2	3	6
2020 to 2025	6	2	3	1	5	4

- Scenario E: 20% in May, 50% in August, and 30% in December.
- Scenario F: 100% during the following March.

The results of different scenarios per sub-period are indicated in Table 2. The ranking of the strategies per sub-period is indicated in Table 3. The results presented in Table 2 indicate that no single strategy consistently outperformed the others across all sub-periods. Over the full 26-year period, the difference between the best-performing strategy (Scenario D) and the poorest-performing strategy (Scenario F) amounted to only 3,5%.

This finding is further supported by Figures 4 and 5, which illustrate the number of occasions on which each strategy achieved either the highest or the lowest net production value (NPV)

during the respective sub-periods. The results indicate that no individual strategy consistently produced the best financial outcome across all periods. However, according to the information in Table 3, Scenario D was either ranked 1 or 2 in the various sub-periods.

Conclusion

The analysis presented in this study, as illustrated in Table 1 and Figures 1 to 3, indicates that none of the six marketing strategies consistently outperformed the others in terms of financial value. For example, Scenario F, in which 100% of the crop is marketed or priced during the following March, generated the highest NPV in nine of the 26 years analysed (more frequently than any other strategy) but also produced the lowest value in four years. This demonstrates that the performance of a marketing strategy is

Figure 4: Number of times each strategy achieved the highest production value for each sub-period. (Source: Agbiz Grain)

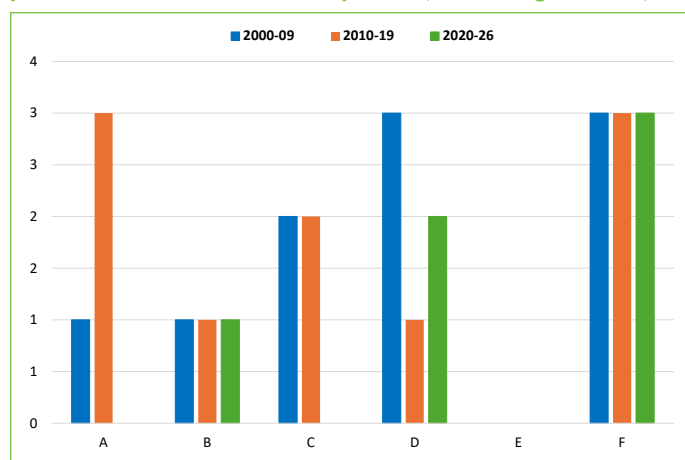
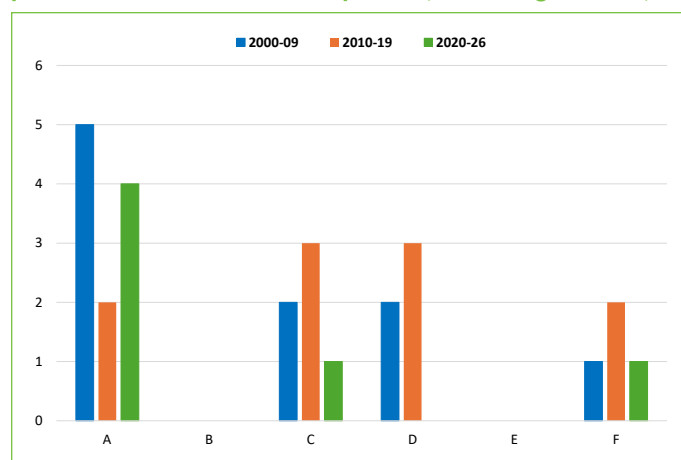


Figure 5: Number of times each strategy achieved the lowest production value for each sub-period. (Source: Agbiz Grain)



highly dependent on prevailing market conditions and that no single strategy can be regarded as consistently superior.

A JSE/Safex futures price should never be evaluated in isolation. Every pricing decision should first be assessed against the farm's break-even price, which is determined by its production costs. Market participants should also consider local and international supply and demand conditions, exchange rate movements, seasonal production prospects, and geopolitical developments before making a final marketing decision. Evaluating these factors alongside prevailing market prices enables producers to make more informed decisions that support long-term profitability.

Although none of the pricing strategies consistently delivered the highest financial return, the analysis suggests that certain months may offer more favourable marketing opportunities than others. These periods warrant

closer attention as part of an ongoing marketing strategy that continuously monitors production costs, market prices, seasonal trends, supply and demand fundamentals, exchange rate movements, and geopolitical developments.

Based on the findings, particular attention should be given to May, August, November and December, as these months may provide favourable pricing opportunities under the right market conditions. Scenario D, in which 100% of the crop is priced in August, generated the highest financial value and ranked first or second across all three sub-periods; however, this concentrates risk, since the entire crop is marketed in a single month.

February and March of the following year may also present attractive marketing opportunities. However, the potential price advantage should be evaluated against the cost of carrying grain, including storage and financing costs, as well as the tax implications of delaying

sales into the next financial period. These factors can materially influence the net return realised by the producer and should therefore be considered before a final marketing decision is made.

It is important to note that carrying costs, financing costs, storage costs, and tax implications were not included in the calculations undertaken in this study. Consequently, the results should be interpreted as an assessment of seasonal wheat price behaviour rather than as evidence of the economic benefits associated with postponing grain sales. ^a

This article does not constitute marketing advice and is intended solely for research purposes to illustrate how seasonal wheat pricing patterns have changed over time. Agbiz Grain, Agbiz, and their employees accept no responsibility or liability for any marketing decisions, activities, or losses arising from the use of this article.

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Reaping the benefits of grain drying

By Christal-Lize Muller, Plaas Media

Grain drying remains a strategic support service that creates value for both producers and agribusinesses offering the service. Jan de Sousa, general manager operations at AFGRI Grain Management, says the company provides grain drying primarily as a support service to producers rather than as a profit-driven business activity. While the service must remain economically viable and aligned with prevailing market conditions, its primary objective is to create value for producers and improve the efficiency of grain handling operations.

According to De Sousa, grain drying offers producers several key benefits:

- **Market access and price optimisation:** Producers aim to access the market as early as possible when prices are favourable. This often results in grain being harvested at higher moisture levels, which may fall outside grading regulations. The drying service allows producers to reduce moisture content to acceptable regulatory levels (e.g. 14% for maize), thereby ensuring market compliance and access.
- **Reduced grain losses:** Harvesting grain at slightly higher moisture levels and then drying it under controlled conditions helps prevent over-drying and associated weight and quality losses.
- **Improved harvesting efficiency:** During winter grain deliveries (e.g. wheat), drying plays a critical role in enabling faster removal of crops from the fields. The same applies to summer crops such as maize, particularly where follow-up crops or intensive farming practices are implemented.
- **Protection of grain quality:** Controlled drying helps preserve grain quality and, depending on the initial conditions, can contribute to improved grading outcomes.
- **Storage and logistical advantages:** From an operator perspective, earlier intake of grain allows for better utilisation of storage facilities, reduces pressure on silo capacity, and enables the spreading of intake volumes over a longer harvest period.

De Sousa says grain drying is inherently volume-driven and dependent on prevailing commodity prices and the cost of drying (energy, infrastructure, handling). "Producers will only make use of the service where it is economically viable, meaning the cost of drying must be justified by the final net return realised in the market."

Strategic approach

Heinrich Henning, operations manager at Senwes Grainlink, says harvest timing is one of the most important management decisions in grain production because it involves not only the physical act of harvesting, but also cashflow, risk management, logistics and, ultimately, the value of the crop. The decision to harvest grain earlier, while its moisture content is still relatively high, or to delay harvesting to allow for further natural drying in the field, should therefore be regarded as a strategic business decision.

A key consideration is balancing immediate cashflow with maximising value. Delivering grain immediately can improve liquidity and help meet financial obligations on time. However, interest costs, working capital requirements, and the time value of money must be weighed against the potential risk of a lower yield due to adverse weather conditions or excessive natural drying, if harvesting is delayed.

This makes it not only a production decision, but also a financial one. Drying capacity and logistical constraints are equally important considerations. During peak harvest periods, limited drying capacity, transport availability and offloading at silos or mills can place considerable pressure on producers. Delaying harvest increases the risk of weather-related losses, while harvesting earlier requires sufficient drying and storage capacity.

Henning emphasises that storage options should be planned well in advance. Whether grain is stored in commercial silos, on-farm facilities or alternative storage facilities has direct implications for costs and risk. Every additional day of waiting has a financial implication, particularly when capital is tied up or grain quality is at risk of deteriorating. Storage should therefore not be viewed as a separate consideration, but as an integral component of an effective harvest strategy.

Result of harvesting earlier

Harvesting grain at a higher moisture content is a financial decision as well as an important risk management and operational strategy. Where drying facilities are available, earlier harvesting can reduce field-related risks. A key advantage of harvesting earlier is that the crop is exposed to field risks for a shorter period. This helps reduce losses caused by birds and wildlife, heads falling to the ground, and kernel damage. It also spreads the harvest workload more evenly, easing pressure during peak harvest and improving harvesting efficiency.

Weather and seasonal conditions are important considerations. Late-season rainfall can make fields inaccessible, delay harvesting, and reduce grain quality. By harvesting earlier, producers can minimise the risk of wet conditions and quality downgrades.

From a logistical perspective, earlier harvesting provides greater control over equipment, transport, and labour. It can reduce combine harvester downtime, ease congestion at silos, and improve transport planning. Crop residues also become available sooner, providing an earlier source of feed for livestock and adding value to the production system.

Strategically, earlier harvesting offers further production benefits. Fields become available sooner for operations, allowing follow-up crops to be established on time and crop rotation plans to be implemented more effectively. In some seasons, having grain available earlier may also enable producers to take advantage of favourable market conditions, including



Producers attended the Grain Game Changer Information Day at the Migdol silo where they also viewed the Senwes Migdol PERRY dry oven. (Photograph: Senwes)

price premiums. This can have a significant impact on the final income earned per tonne of grain.

Henning says the decision to harvest earlier is ultimately about spreading yield risk over time, reducing dependence on ideal weather conditions, limiting late-season disease pressure, and preventing kernel losses in the field. The most effective harvesting strategy is therefore one that balances financial, logistical, and production risks.

The financial benefit

Koos Bezuidenhout and his son, Jurie, farm in the Migdol district of North West. According to Koos, harvesting their soya bean and maize crops at higher moisture levels and delivering them for commercial drying proved to be a sound financial decision this season. This was made possible by Senwes' customer-focussed investment in grain-drying facilities, including the installation of a grain dryer at its Migdol silo. Bezuidenhout says the new facility has had a significant impact on their farming operations.

This year, the Bezuidenhouts delivered soya beans with an average moisture content of 14,3% and maize at an average of 14,4%, with some maize loads measuring between 15 and 16%. Traditionally, soya beans are delivered at a moisture content of 13% or lower, while maize is delivered at 14%. Loads exceeding these limits are often rejected or returned. However, harvesting grain at lower moisture levels increases harvest losses. As maize dries, ears are more likely to fall off before they can be harvested, while dry soya bean pods shatter more easily on the header, resulting in significant wastage.

By harvesting soya beans at 14,3% moisture instead of waiting for the crop to dry naturally to 13%, Koos estimates that harvest losses were reduced by around 0,2t/ha (200kg/ha). The higher moisture content made the plants less brittle, significantly reducing pod shatter and grain losses. He explains that achieving an exact target moisture content under field conditions is almost impossible. Traditionally, producers consider themselves fortunate to harvest soya beans at an average moisture content of around 11%. The availability of the commercial grain-drying facility allowed them to harvest earlier, deliver grain at a higher moisture content, and substantially reduce harvest losses.

Drying soya beans from 14,3% to the required delivery moisture content cost R43/t this season. However, the value of the grain saved far exceeded the drying cost. According to Koos, harvesting at the higher moisture content reduced harvest losses by 0,2t/ha. At a soya bean price of R6 500/t, this represents a gross financial benefit of 0,2t/ha (reduced harvest losses) $\times$ R6 500/t = R1 300/ha.

With an average yield of 3,5t/ha, the drying cost on an area basis was $R43/t \times 3,5t/ha = R150,50/ha$. The net financial benefit was therefore $R1 300/ha - R150,50/ha = R1 149,50/ha$. This represents a net return on the drying investment of R1 149,50/ha. Koos explains that across their 700ha soya bean crop, this translated into an additional return on investment of $700ha \times R1 149,50 = R804 650$. Expressed in yield terms, the net financial benefit equates to around 0,177t/ha of additional soya beans harvested and delivered

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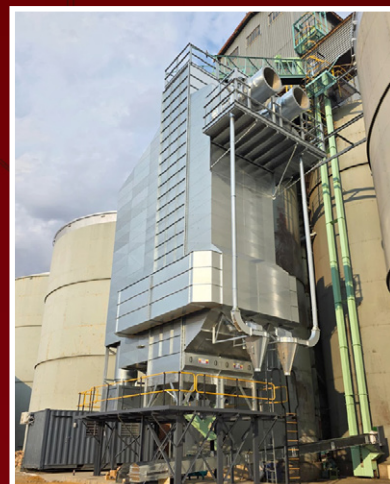
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as a result of reduced harvest losses: $R1\ 149,50 \div R6\ 500/t = 0,1768t/ha$ (177kg/ha).

Shorter harvest window

Koos says the drying facilities not only reduced harvest losses but also shortened the harvest season. "This was a difficult year because the soya beans stayed wet for a long time," he explains. "High humidity, saturated soils, and frequent rainfall delayed natural drying."

Soya beans reach physiological maturity before they are dry enough for delivery. Without access to drying facilities, producers have to wait until moisture drops naturally to around 12% before harvesting. With commercial drying available, however, harvesting can begin at around 15% moisture, or about a week earlier than would otherwise be possible.

"In wet years, we would normally only start harvesting around 14:00, once the crop had dried sufficiently, and then stop again around 19:00 when evening moisture returned. That limited us to only a few hours of harvesting each day." This season, the availability of commercial drying meant wetter soya beans could be harvested from early morning, allowing for much longer harvesting days. "If we can harvest for a full day, we cover about 70ha. On our 700ha soya bean crop, that means we can finish harvesting in about ten days," says Koos.

Under similar wet conditions without drying facilities, harvesting the same area would typically have taken between 15 and 20 days. "This year, we almost halved our harvesting period because we were able to deliver wetter beans for drying."

Advantages for producers

According to Francois Froneman, managing director of grain and trading for the VKB Group, harvesting grain at higher moisture levels offers several advantages for producers:

- Earlier harvesting allows the harvesting process to be spread over a longer period. This can reduce mechanisation costs by lowering the number of combines, grain carts, trucks, and other equipment required.
- Contractor costs and temporary labour expenses can be reduced if harvesting takes place over an extended period, enabling producers to rely more on their own equipment and permanent workforce.
- Access to grain drying facilities allows producers to remove crops from the field before the next rainfall event, particularly during La Niña seasons when wet conditions are common.
- Harvesting sooner provides more time to prepare fields for the next production season.
- Harvesting grain at its optimum moisture content minimises physical grain losses and wastage during the harvesting process.
- There is a widely held view that artificially dried grain retains a weight advantage over grain that dries naturally in the field. This is commonly referred to as 'phantom yield loss'.
- Producers may benefit from favourable pricing by securing early-season maize contracts.
- Higher price premiums are often available for grain, particularly when export vessels have been booked early and exporters require stock for deep-sea exports. This is especially relevant when national grain stocks are low before the start of the traditional harvest season.
- Harvesting grain at higher moisture levels may reduce the risk of aflatoxin contamination.
- Earlier harvesting helps avoid field-related risks such as head diseases and crop lodging.
- In irrigated production systems where double cropping is practised, timely removal of the first crop allows the follow-up crop to be planted within its optimal planting window, which can have a significant positive impact on the yield potential of the second crop.



The Overberg Agri Rietpoel silos. (Photograph: Overberg Agri)

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Grading being done at the Overberg Agri Caledon silos – the facility also has a dry oven. (Photograph: Overberg Agri)

Protecting quality during storage

According to Overberg Agri's Johan Lusse, general manager of grain and agricultural services, and Jan Roux, manager of grain storage and handling, grain drying is an essential service that helps producers protect the quality of their harvest, ensure safe storage, and reduce the risks associated with the harvesting season.

Lusse and Roux explain that rainfall during harvest is one of the greatest risks facing grain producers. Accepting grain with a higher moisture content at silos and drying it professionally enables producers to remove their crops from the field sooner, before adverse weather conditions compromise grain quality. This also improves harvesting capacity, allowing producers to begin harvesting earlier in the morning and continue later into the evening, rather than waiting for the grain to dry naturally in the field.

For safe long-term storage, grain must be dried to the correct moisture content. Wheat, barley and oats should be dried to a maximum moisture content of 13%, whereas canola should be dried to approximately 8%. Overberg Agri can accept grain for drying with moisture levels of up to 15% for wheat, 14,5% for barley, and 12% for canola.

Before drying begins, wet grain is received into aerated facilities equipped with temperature monitoring systems, providing a safer alternative to temporarily storing wet grain on the farm. There is a direct relationship between grain's moisture content, temperature, and the length of time it can be stored safely. Grain stored for extended periods at moisture levels above 13% is susceptible to developing hot spots within the silo. These hot spots can cause heat damage, promote fungal growth, and create potential food safety risks.

Elevated moisture levels also increase the likelihood of insect infestation, leading to further quality losses and financial implications for producers.

Grain that becomes wet while still in the field may begin to germinate before it is harvested. In wheat, pre-harvest sprouting reduces baking quality, while in barley it lowers both the grain grade and germination capacity, making it unsuitable for malting.

Key considerations: Grain drying

According to Lusse and Roux, the purpose of grain drying is to remove moisture from the grain in a controlled manner that preserves its quality and market value. Each crop has specific drying requirements, which is why the drying process must be carefully managed. Barley, for example, must be dried at lower temperatures to preserve its germination capacity, a critical requirement for the malting industry. Drying it at excessively high temperatures causes it to lose its ability to germinate, rendering it unsuitable for malting. Similarly, excessive drying temperatures can adversely affect the quality of wheat and canola.

Overberg Agri uses modern diesel grain dryers that control the drying process with precision to achieve the desired moisture content without compromising grain quality. It is important that grain with a moisture content above safe storage levels is dried as soon as possible after harvest. The longer wet grain remains warm, the greater the risk of heat build-up, fungal growth, insect infestation, and quality deterioration.

By carefully managing the combination of drying temperature, airflow and moisture control, agricultural businesses ensure that grain can be stored safely while preserving its quality, food safety, and market value for producers. 

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Powering down: Impact of soaring electricity tariffs on the grain and silo sectors

By Bhekani Zondo, senior agricultural economist, NAMC

The National Agricultural Marketing Council (NAMC) conducted a study on the potential impact of electricity tariff hikes on the agricultural sector. The findings illustrated how sharp tariff increases could impact the agricultural economy, affecting farming activities, food production, food security, and rural livelihoods.

The agricultural sector has developed immensely, with producers integrating advanced agricultural practices, equipment, and machines that require electricity to operate. Activities in farming and value addition, such as grain storage silos, abattoirs, and cold chain storage facilities for horticultural and meat products, depend on electricity. Other farm operations, ranging from managing irrigation systems to maintaining the quality of stored produce, also rely on electricity.

Electricity tariffs in South Africa have increased sharply over the past two decades, reshaping the economic landscape for businesses and households. Tariffs have risen by more than 500% since 2007, far outpacing inflation and placing greater pressure on sectors dependent on stable, affordable energy. The Department of Mineral Resources and Energy reports that the average electricity tariff rose from 19,59c/kilowatt hour (c/kWh) in 2008 to approximately 143,5c/kWh by 2023, reflecting a staggering increase of over 600% in 15 years.

During the 2025/26 financial year, the National Energy Regulator of South Africa (Nersa) approved a 12,74% increase in electricity tariffs. Effective 1 July 2026, electricity tariffs increased by 8,76%, placing additional financial pressure on households, businesses, and other sectors of the economy.



Steep electricity tariff hikes are among the most critical cost pressures that producers are facing. Electricity is not a discretionary expense for producers, grain handlers, millers, and silo operators. It powers irrigation, drying, aeration, conveying systems, grading equipment, lighting, security systems, and administration infrastructure. The cost of moving grain from the farm gate into safe storage and eventually to processors and consumers increases across the value chain as tariffs rise above the general inflation rate.

Impact on grain producers and silo operators

For grain producers, electricity is closely tied to production efficiency. Although a large share of maize and oilseed production is rainfed, irrigated grain production is highly exposed to the high cost of electricity through pumping, centre-pivot irrigation, and water management systems. Wheat, maize and soya bean producers who depend on irrigation face higher operating costs when tariffs rise, especially during peak production periods when electricity demand is difficult to reduce without affecting yields.

The tariff increases also raise indirect costs through inputs and services. Fertiliser handling, on-farm storage, repairs, transport depots, and processing facilities all depend on electricity. When these businesses are confronted with higher energy bills, the expenses are often passed back to producers or forward to processors and consumers. This puts pressure on farm profitability, particularly in seasons when grain prices are low or yields are reduced by drought, pests, or logistical disruptions.

Grain silos are energy-intensive facilities, as they add value by receiving, cleaning, drying, handling, and safely storing large volumes of grain within short seasonal harvesting windows. Electricity powers elevators, conveyors, intake systems, fans, dryers, dust-control systems, weighbridges, and monitoring equipment. During the harvest season, these operations cannot simply be paused when electricity prices rise. Any disruption or delay can result in congestion, operational downtime, grain quality deterioration, and higher post-harvest losses.

Aeration and drying are especially important during the storage and processing of grain. Grain stored with a high moisture content or without sufficient ventilation is vulnerable to mould, insect infestation, and quality degradation. Higher tariffs create an impossible trade-off: Operators must either absorb the extra storage cost or risk quality deterioration, which compromises the value of the crop. In practice, responsible silo operators are limited in their ability to cut electricity use without compromising grain quality.

Effects on the value chain

The impact of electricity tariff hikes is not confined to silo owners. Higher storage and grain-handling costs translate into increased fees for producers, traders, and processors. Millers and animal feed manufacturers also have to contend with higher procurement and operating costs, which ultimately filter through to consumers in the form of higher prices for staple foods such as maize meal, bread, and other grain-based products.

The pressure is particularly acute in rural areas, where silos serve as vital infrastructure underpinning local grain economies. If electricity costs continue to rise faster than operators can recover, investment in maintenance, expansion, and technology is likely to be curtailed. This will erode the competitiveness of the domestic grain industry and increase the risk of losses and food waste, especially during high-volume harvest seasons.

An unsustainable burden

The continued escalation of electricity tariffs has become unsustainable for the agricultural sector. Rising energy tariffs affect grain production, drying, storage, and transportation, with consequences for farm profitability, the sustainability of storage infrastructure, food processing, and the affordability of food.

Addressing this challenge requires coordinated action from all social partners. Greater emphasis must be placed on improving energy-use efficiency and boosting investment in alternative power sources, particularly renewable energy technologies. In this regard, the Agro-Energy Fund established under the Agriculture and Agro-processing Master Plan (AAMP) provides producers with a mechanism to mitigate the impact of high energy tariffs. [a](#)

For more information, send an email to info@namc.co.za or visit the National Agricultural Marketing Council website at www.namc.co.za



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Why testing matters: The ongoing battle against mycotoxins

By Wiana Louw, The Southern African Grain Laboratory NPC

When people think about food safety risks, it is often bacteria and pesticides that come to mind. Yet one of the most persistent and unpredictable threats to food and feed safety is far less visible: mycotoxins.

These naturally occurring toxins have been present for as long as crops have been cultivated, and despite advances in agriculture and storage technology, they continue to challenge producers, grain handlers, food processors, and regulators worldwide.

What are mycotoxins?

Mycotoxins are toxic chemical compounds produced by certain moulds (fungi) that infect crops. Scientists still do not fully understand why these fungi produce mycotoxins, but the toxins can remain in grain and food products long after the fungus itself has disappeared. Hundreds of mycotoxins have been identified, each produced by different fungal species. Some, such as aflatoxins, are particularly dangerous – aflatoxin B₁ is recognised as one of the most potent naturally occurring carcinogens known.

Contamination can occur either while crops are growing in the field or later during storage. This makes mycotoxins a unique and complex food safety challenge.

Why should we be concerned?

Most mycotoxins can cause disease when contaminated food or feed is consumed by humans or animals. Their impact ranges from reduced animal performance and weakened immune systems to severe illness and long-term health effects.

Unlike many biological contaminants, mycotoxins are highly stable compounds. Once present, they are difficult

to destroy using standard food-processing methods. This means that prevention and monitoring are the most effective management tools.

The challenge is further complicated by the fact that mycotoxin contamination is both unavoidable and unpredictable. Levels can vary considerably from one season to another and from one production region to the next.

How do mycotoxins get into food?

A common misconception is that mycotoxins are associated only with poorly stored grain. In reality, contamination can begin long before harvest. Certain fungi infect crops during the growing season, while others become problematic during storage. Grain stored under high moisture conditions (above 14%), exposed to high humidity, elevated temperatures, or inadequate drying practices, becomes particularly vulnerable.

Environmental conditions also play a major role. Rainfall patterns, drought stress, insect damage, temperature fluctuations, and storage conditions can all influence the development of fungal infections and the production of mycotoxins.

Can you see mycotoxins?

The simple answer is no. One of the most important lessons from mycotoxin research is that visual appearance is not a reliable indicator of contamination. Studies conducted on maize samples have shown that grain with significant visible fungal damage may contain no detectable mycotoxins, while grain that appears relatively healthy may contain measurable toxin levels.

Similarly, grain grading results cannot be used to predict mycotoxin content. A high-quality grain grade does not guarantee the absence of toxins, and a lower grade does not necessarily indicate their presence. The only proven way to determine whether grain or food contains mycotoxins is through laboratory testing.

How are mycotoxins detected?

Accurate mycotoxin analysis begins long before a sample reaches the laboratory. Representative sampling is critical because mycotoxins are often unevenly distributed within a grain lot. A poorly collected sample can yield misleading results regardless of how sophisticated the analytical method may be. Once collected, samples must be correctly prepared. Grain is milled to a particle size smaller than 1mm and thoroughly mixed to ensure that subsamples accurately represent the entire batch.

The availability of rapid screening technologies based on immunochemical techniques has increased in recent years, enabling faster testing outside traditional laboratory settings. However, keep in mind that this is a screening test to detect the



presence of the toxin, and concentrations must be verified using a quantitative analytical technique.

The gold standard is liquid chromatography coupled with tandem mass spectrometry (LC-MS/MS). This highly sensitive technology allows laboratories to detect multiple mycotoxins simultaneously and provides the accuracy required for regulatory and food safety purposes.

Managing the mycotoxin challenge

Because mycotoxins cannot easily be removed once present, prevention remains the most effective strategy. In this regard, good storage practices are essential. Grain should be dried adequately and stored under conditions that minimise moisture accumulation and temperature fluctuations. Aeration systems help maintain uniform temperatures and reduce the risk of fungal growth.

Regular cleaning and sanitation of storage facilities and equipment are equally important. Insect pests can damage kernels and create entry points for fungal infection, making effective pest control another key component of prevention. Physical damage to grain should also be minimised during harvesting, handling and storage, as broken kernels are more susceptible to fungal invasion.

Monitoring seasonal trends

Mycotoxin contamination is dynamic and influenced by environmental conditions. As a result, ongoing monitoring is essential.

The Southern African Grain Laboratory (SAGL) surveys have demonstrated that mycotoxin prevalence and concentration levels can vary significantly between seasons and production regions. Samples collected from commercial grain deliveries across the country are analysed using an accredited multi-mycotoxin LC-MS/MS method, providing valuable insight into annual contamination trends. Such surveillance helps the grain industry identify emerging risks and adapt management strategies accordingly.

The take-home message

There is no single solution to the mycotoxin challenge. Not all mycotoxins are the same, and testing for only one toxin, such as aflatoxin B₁, cannot guarantee food safety. Mycotoxin patterns change from season to season and region to region, making continual monitoring essential.

Visual inspection cannot predict contamination, and grain grade is not a reliable indicator of mycotoxin levels. Correct sampling, sample preparation, and laboratory analysis are the foundation of effective mycotoxin management.

Ultimately, the grain and food industries can only manage the risks they understand. Ongoing testing, surveillance, and awareness are therefore critical to protecting animal and human health. As the saying goes: We can only manage what we know. ^a

For more information, send an email to the author at wiana.louw@sagl.co.za or visit www.sagl.co.za



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The National Water Amendment Bill raises concerns

By Annelize Crosby, head of legal intelligence, Agbiz

The portfolio committee on water and sanitation has called for written submissions on the *National Water Amendment Bill*. This article attempts to summarise the main concerns from the agriculture sector's perspective on the *Bill*.

Curtailment of water rights

The proposed rules regarding the curtailment of water rights are rather vague. The *Bill* provides that water rights can be reduced if producers do not use the entirety of water allocated to them, but it does not explain what is meant by 'failure to use'. Agriculture is highly variable, with rainfall, crop rotation, and market conditions all affecting water use. Without clear criteria, there is a risk of unfair reductions.

Agbiz suggests in its written submission that curtailment should only happen after several consecutive years of unjustified underuse and with proper consultation. "Temporary or partial non-use should therefore not, in itself, constitute grounds for reducing an existing lawful water use."

Licence renewals and trading ban

The *Bill* allows water licences to be extended for six months while renewal applications are processed. While this is helpful, it can be argued that renewals should be automatic if applications are submitted on time. The proposed period of six months may be too short, as the Department of Water and Sanitation itself is often responsible for delays. A longer timeframe would bring more certainty.

The *Bill* proposes banning the trading of water rights, overturning Constitutional Court rulings that allowed transfers with compensation. Agbiz argues in its submission that trading helps manage water variability and encourages investment in water-saving technologies. Without compensation, there will be less incentive to conserve water, and producers will instead use their full allocation to avoid losing rights. "By removing the holder's ability to be compensated, it could serve as a perverse disincentive to use water efficiently."

Effect on the agricultural sector

The *Bill* introduces blanket bans on farming, forestry, and mining in certain water source areas, including a 32m setback from watercourses. These provisions duplicate existing environmental laws and could unfairly penalise those already operating legally. Agbiz calls for a risk-based approach rather than blanket prohibitions.

Orchards, vineyards, and forestry require a secure water supply for five to 25 years. If licences are reviewed or withdrawn mid-cycle, users could lose millions in sunk investments. Agbiz insists that transitional provisions and compensation are essential to protect these livelihoods.



Photograph: www.magnific.com

The *Bill* allows the minister to reallocate water between provinces or sectors. Agricultural producers fear this could reduce their legal entitlements without clear rules or appeal processes. Agbiz calls for transparent procedures, public participation, and safeguards to ensure fairness.

The *Bill* prioritises redress for past racial and gender discrimination in water licensing. While supporting transformation, Agbiz warns that simply reserving water volumes without practical guidance could lead to underuse and harm food security. Rather, the *Broad-Based Black Economic Empowerment Act, 2003 (Act 53 of 2003)* and the *Agriculture and Agro-Processing Masterplan* should be utilised to ensure transformation creates sustainable businesses.

The repeal of section 33 of the current Act means that unregistered existing lawful use rights or ELUs, often held by small-scale producers and communities, could be extinguished without compensation. Agbiz argues that this raises constitutional concerns and calls for transitional arrangements and fair compensation. The strict 90-day registration deadline is also unrealistic and unfairly punitive.

Overall message

The farming sector supports sustainable water management but believes the *Bill*, as drafted, creates uncertainty, discourages investment, and risks undermining food security. Agbiz urges government to refine the amendments with clearer definitions, risk-based approaches, transitional safeguards, and alignment with broader agricultural and transformation policies. [a](#)

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Points to ponder

By Jannie de Villiers



Raise the threshold of your pain

During my years of studying leadership, one of the lessons I learned, especially from the book of Nehemiah, is that leaders sometimes need to take a journey that breaks their hearts. I have practised this principle quite often in my life. Hope for a better future is often born in the despair of life's valleys, when the conviction arises that things simply cannot continue like this.

Before returning to my office in January 2016 after my December holiday, I took such a journey. My son and I drove 1 250km over two days through the drought-stricken Free State and North West to gain a firsthand understanding of what awaited me on my return as CEO of Grain SA. It felt as though we were driving through a desert. The experience broke my heart.

South Africa's first summer rain only arrived on 15 January that year. By December that year, there was no doubt that South Africa was enduring one of the most severe droughts in its history. I longed for a break, away from the stress of being the CEO of Grain SA and the pain I had carried alongside the country's grain producers and their families. I sought the Lord's guidance about how I should spend my December holiday. The answer came with remarkable clarity: Go and spend three days on a farm somewhere in the Karoo.

Discovering pain in drought

So, I took my family to a farm outside Graaff-Reinet. It was dry and blisteringly hot. It was not the kind of holiday I had imagined. There were no air conditioning and no cool sea breeze to offer relief. As we arrived, we were greeted by the sight of a huge kudu bull hanging lifeless on a fence near the farmhouse. It had

simply been too weak to clear the fence. Everywhere we looked, the drought had left its scars.

In my briefcase I had packed my Bible and a new book: *Leadership Pain: The Classroom for Growth* by Dr Samuel Chand. As I began reading, I realised that its message was exactly what I needed for the difficult months ahead – months that would involve facing producers, communities, and the media during a crippling drought that put pressure on supplies and food prices.

The central message of Dr Chand's book was this: "Do you want to become a better leader? Raise the threshold of your pain. Reluctance to face pain is your greatest limitation. There is no growth without change, no change without loss, and no loss without pain. If you are not hurting, you're not leading."

This is what leaders do. Pain is not a reason to quit. If avoiding pain had been the greatest priority, Jesus would never have died on the cross for our salvation. This message became clear to me as I stared through the farmhouse window at the heat rising from the Karoo landscape. Charles Kingsley captured this truth well when he wrote, "Pain is no evil, unless it conquers us".

I returned to my office that year, not with less pain than when I had left, but with a deeper understanding of what leadership requires: making things better for others.

Prospering amid drought

As I write this, weather forecasts indicate that South Africa may once again face a severe drought during the 2026/27 summer season. Those of us who love and work in agriculture may again be confronted with circumstances

similar to those of 2016. Our sector may once more be challenged to pass the financial stress test and cope with the fact that government rarely, if ever, provides support. Yet I am convinced that we will persevere, especially the people who have learned to raise their pain threshold and their faith in a faithful God who provides, even under the most difficult circumstances.

A telephonic survey conducted by the Crop Estimates Committee at the end of December 2015 indicated that only 500 000ha of maize had been planted by that stage of the season. Yet by 27 January 2016, producers had planted just short of two million hectares. In other words, 1,5 million hectares were planted, or roughly 2,3 million maize seed kernels every minute, 24 hours a day, seven days a week. This demonstrates the resilience of our sector and our reaction to the pain that accompanies drought.

Another lasting lesson from that drought came from within Grain SA itself. Staff members who worked directly with producers, whether by telephone, during farm visits, or at meetings, received training in trauma counselling. We needed to up our game and skills when dealing with people in times of stress and pain.

These reflections represent only a small part of what the last major drought taught me. Perhaps these lessons will encourage you if you once again have to face the impact of drought on your farm or in your personal life. [🔗](https://www.facebook.com/devilliersfamily)

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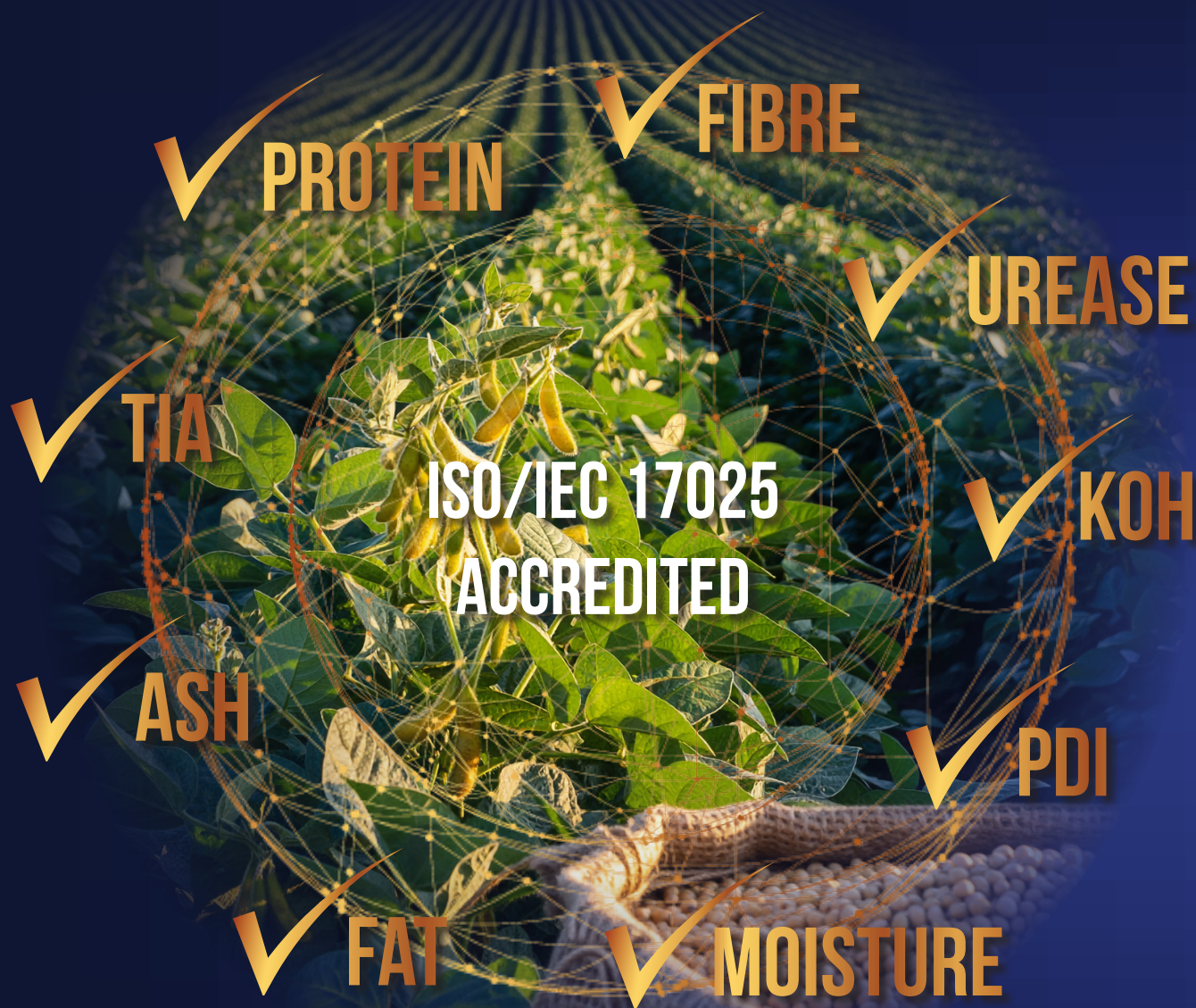
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