The SA Sugar Association has publications available to the public which describe in full detail the diverse aspects of the sugar industry. Please contact the External Affairs Division on 031 508 7026.

**PUBLICATIONS**

- SA Sugar Journal – Available on subscription

**EDUCATIONAL BROCHURES**

- Map of the SA Sugar Industry
- Nutrition Education Print Material

**INFORMATION DISTRIBUTED BY THE SOUTH AFRICAN SUGARCANE RESEARCH INSTITUTE**

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

- Booklets
  - Careers in Sugarcane Agriculture
  - Plant Breeding – Crossing and Selection Programmes
  - SASRI Visitors’ Guide
- Herbicide Guide
- Info Pack CD
- SUSFARMS®

- Information Sheets
- Mechanisation Reports
- Newsletters
  - Ingede (Zulu Newsletter)
  - The Link
- Research Reports
- South African Sugarcane Atlas
- Sugarcane Certificate Course Notes
- SASRI Poster Series
- SASRI Progress Reports
- Technical Manuals
  - Eldana Control
  - Green Manuring
  - Identification and Management of Soils of the South African Sugar Industry
  - Manual of Seedcane Production
  - Soil Series of the Natal Sugar Belt by BE Beater
  - Sugarcane Diseases in Southern Africa
  - Weeds of the South African Sugar Industry

**WEBSITE**

For further information visit the SASA Website: http://www.sasa.org.za
1 AT A GLANCE

The R12 billion South African sugar industry is cost-competitive, consistently ranking in the top 15 out of approximately 120 sugar producing countries worldwide. Stretching across two provinces of South Africa, namely Mpumalanga and KwaZulu-Natal, the sugar industry makes a positive difference to the lives of more than a million people and is a catalyst to economic growth and development.

The sugar industry provides employment in job starved regions often in deep rural areas where there is little other economic activity or employment opportunity. The industry provides education and training, contributes to excellence in research, science and technology, supporting enterprises, and ensuring the sustainable use of natural resources. Opportunities for this industry to contribute further to South Africa lie ahead and include renewable energy.

LAND REFORM

The South African sugar industry has transferred 21% of freehold land under cane from white to black owners since 1994 off a base of 5%. This industry’s proactive stance on land reform, which commenced in 1996, has been the foundation for the achievement to date.

The multi-faceted approach to land reform is one of the reasons that the sugar industry land transfer statistics are substantially higher than the national average. The industry has worked closely with the government on numerous land reform projects which have contributed to the success of land reform in the industry.

2 GROWING THE ECONOMY

Based on revenue generated through sugar sales in the SACU region as well as world market exports, the South African sugar industry generates an annual estimated average direct income of over R12 billion.

The South African sugar industry makes an important contribution to employment and sustainable socio-economic development, particularly in rural areas. This is built on its agricultural and industrial investments, foreign exchange earnings, labour intensity, and linkages with major suppliers, support industries and customers.

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

EMPLOYMENT

An important feature of the industry is that there is employment in rural and deep rural areas in job starved regions where there is often little other economic opportunity. Direct employment occurs in both in the sugar cane field and the sugar mills and cuts across a diverse array of skills from farm labourer to agricultural scientist.

There is also direct and indirect employment through numerous support industries in the provinces where sugarcane is grown and processed. The sugar industry creates approximately 79 000 direct jobs, which represents over 11% of the total agricultural workforce in South Africa. In addition there are the registered cane growers supplying cane for processing to sugar mills. Indirect employment is
estimated at 350,000 jobs. Approximately one million people or 2% of South Africa’s population depend on the sugar industry for a living.

INDUSTRY SIZE
Sugarcane is grown by approximately 24,000 registered sugarcane growers farming predominantly in KwaZulu-Natal with substantial operations in Mpumalanga, and some sugarcane production in the Eastern Cape. Sugar is manufactured by six milling companies with 14 sugar mills operating in the cane-growing regions. The industry produces an average of 2.3 million tons of sugar per season. About 76% of this sugar on average is marketed in the Southern African Customs Union (SACU). The remainder is exported to markets in Africa, Asia and the USA.

Sugarcane is a strategic crop for Kwazulu-Natal and Mpumalanga, where sugarcane production is located, comprising nearly 50% of field crop gross farming income across the two provinces.

STABILITY OF RURAL AREAS
A unique relationship exists between sugarcane and sugar production, in that cane is a bulky, non-tradable commodity which requires rapid post-harvest processing in order to preserve the sucrose in the cane stalk. As a result sugar mills are always located as close as possible to cane supply. The financial viability of these significant capital investments is entirely dependent on a sustainable supply of sugarcane in each mill supply area.

This in turn means the sheer size of economic activity generated in rural areas through the activities of sugarcane cultivation and sugar production generates a vast number of jobs in support industries and commerce. In most cases the sugar mill and accompanying cane farms form the backbone of the nearest rural town and are major contributors to the development of secondary economic activity, services and infrastructure that otherwise would be absent.
BUILDING COHESIVE, CARING, SUSTAINABLE COMMUNITIES

The South African sugar industry is a people driven and people focused industry that includes the maintaining and building of sustainable communities. This is achieved through a substantial number of projects undertaken by the South African Sugar Association, the South African Cane Growers’ Association, and the milling companies, Illovo Sugar (South Africa) Limited, Tongaat Hulett Sugar South Africa Limited, Tsb Sugar Holdings (Pty) Limited, Gledhow Sugar Company (Pty) Limited, UCL Company (Pty) Limited, and Umfolozi Sugar Mill (Pty) Limited.

These projects include funding, training, support, administration and management in diverse areas namely land reform, human resource development, education and training, skills development, social enterprise development, and health and welfare.

LAND REFORM

The South African sugar industry has long recognised the need to promote diverse ownership of agricultural land under sugarcane, and the need for a range of support initiatives in place to promote the sustainable transfer of land. These initiatives have contributed significantly to the transfer of 21% of freehold land under commercial sugar cane production from white growers to black growers.

Land Reform in the sugar industry commenced in 1996 when Illovo Sugar and Tongaat Hulett Sugar proactively initiated land transfers of their own properties to experienced black growers in the industry. This proactive approach led to 18 789 hectares being transferred to 170 black growers.

In 2013/14, the sugar industry has transferred 70 627 (21%) hectares of freehold land to 24% black commercial growers. Area under cane is 28 643 hectares transferred under redistribution and 41 983 hectares under restitution whilst approximately 130 000 (39%) hectares currently are under claim. The industry has allocated R2.57 million for the following three years for the training of land reform growers. To date more than 1000 land reform growers have already been trained in agronomics and business management.

The industry has since expanded its focus on land reform beyond the redistribution programme. A dedicated Land Reform Department has been established at the South African Sugar Association to initiate activities that supports the sustainable transfer of land to black growers. These initiatives include the following strategic areas:

- The development of a comprehensive support programme for land reform growers, which is inclusive of induction and orientation programmes, training and skills development, mentorship and institutional support programmes to large communal land holding entities,
- A partnership with the Land Claims Commission to ensure the timeous and sustainable settlement of gazetted restitution claims,
- A strategic partnership with government to recapitalise transfers of land reform farms. Government provides the funding for agricultural inputs and infrastructure, whilst the industry supports growers in the development of farm business plans, training and production support.

The industry believes that these strategic projects will lead to optimal levels of production on land reform farms, the emergence of skilled and capacitated growers, and sound governance practices amongst the new land holding institutions. These interventions will create sustainable black business enterprises.
A WORLD CLASS INDUSTRY THROUGH TECHNOCLOGICAL EXCELLENCE

One of the South African sugar industry’s hallmarks is its technological excellence which contributes to enhancing the profitability of the industry, ensuring the industry remains at the forefront of innovation and is ready to tap into the exciting opportunities that lie ahead such as renewable energy.

The South African Sugarcane Research Institute and the Sugar Milling Research Institute, form the backbone of this technological excellence. The extensive network of science and technology across the industry ensures that the South African sugar industry is globally competitive.

SOUTH AFRICAN SUGARCANE RESEARCH INSTITUTE

The South African Sugarcane Research Institute (SASRI) is the leading sugarcane agricultural research institute in Africa. The Institute is renowned for its research into the development of new sugarcane varieties and improvement of crop management and farming systems to enhance profitability of the industry. Effective delivery of new knowledge and technology make a significant contribution to the sustainability of the industry. Research is clustered within four multi-disciplinary programmes including variety improvement, crop protection, crop performance and management, and a systems design and optimisation programme. Further detail provided in the South African Sugar Association section.

SUGAR MILLING RESEARCH INSTITUTE

The Sugar Milling Research Institute NPC (SMRI) is the central scientific organisation involved in research work and technical services for the southern African sugar milling and refining industries. All 14 raw sugar factories in South Africa and the central refinery of the Tongaat-Hulett Group are Full Members of the SMRI. In addition, the Institute provides a technical service to a number of Affiliated Member mills in Swaziland, Mozambique, Zimbabwe, Malawi, Zambia and Tanzania.

SOUTH AFRICAN SUGAR TECHNOLOGISTS’ ASSOCIATION

The South African Sugar Technologists’ Association (SASTA) is an organisation of technical workers interested in the technical aspects of sugarcane agriculture and sugar processing practices. It aims to promote the interchange of scientific knowledge and investigation of technical issues related to the production and processing of sugarcane. SASTA promotes the accuracy and standardisation of factory chemical control methods and assists in improving the technical knowledge of persons engaged in the South African sugar industry. The Factory Control Advisory Committee (FCAC) – a subsidiary of SASTA, focuses on issues of efficiency and measurement of parameters around factory control.

The SASTA Council consists of elected volunteers within the Association responsible for its functioning and organisation of events. An annual congress promotes knowledge sharing within the industry. Approximately 600 delegates from southern Africa and internationally attend, with papers and posters from factory and agriculture sectors compiled into a three-day congress programme. SASTA also arranges workshops and roadshows around topical issues pertaining to the sugarcane industry, promoting and encouraging information sharing and skills development.
The multi-faceted contribution of skills development, training, and education by the South African sugar industry includes: direct skills development, specific training courses, bridging courses, agricultural and industrial training, the provision of bursaries for university and technology centers, funding of programs that improve the quality of education in rural primary and high schools, provision of material on nutrition to colleges nationwide, and numerous opportunities in the field of science and technology.

Some of the key divisions of the South African Sugar Association delivering on the objective of strengthening skills includes the South African Sugarcane Research Institute, the Shukela Training Centre, and the Nutrition Department. Further detail on these divisions under the South African Sugar Association. In addition, other establishments that also contribute include The Sugar Industry Trust Fund for Education, and the Sugar Milling Research Institute.

### HUMAN RESOURCE DEVELOPMENT

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

#### Ownership Profile

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

### Support Services

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

Mentorship programmes focussing on business skills and grower support extension services are deployed to support cane growing activities. The South African Cane Growers’ Association provides technical skills training for new and emerging cane growers, financial management workshops, regional economic advisors, and grower support service officers.

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

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

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

Educational Support – The Sugar Industry Trust Fund for Education (SITFE) was launched in 1965 as a private sector initiative and is one of South Africa’s longest running educational and training support organisations. SITFE has adopted a cradle-to-career approach which has evolved over the years to meet the changing needs within the sugarcane growing communities. To date SITFE has provided bursaries to more than 10,000 students from these communities. SITFE enjoys partnerships with expert organisations across the educational value chain from early childhood development to high school level interventions to educator development.

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

From left: SASA specialists – Ryan Hoskings (Export Trading Manager), Nokulunga Nzuke (Umthombo Compliance Manager), Mohammed Shaik (CTS Finance and Admin Manager) Nkgasha Tema (National Market Manager), S’du Myeza (Nutrition Manager) and Deshnie Govender (Management Accountant).
The dispersion of scientifically accurate information about health in general and specifically on the role of sugar in nutritionally balanced diets and in healthy lifestyles is one of the key objectives of the sugar industry. This is done in the context of comprehensive nutrition education projects.

South Africa is affected by diseases including TB, HIV and AIDS, non-communicable diseases like diabetes and cardiovascular diseases. Nutritionally balanced diets and healthy lifestyles have an important role in the prevention and treatment of all these diseases.

It is within this context that the sugar industry proactively contributes to the national imperative of improving the health of all South Africans through its science based interventions.

EDUCATIONAL ACTIVITIES

In implementing nutrition programmes the South African Sugar Association’s Nutrition Department collaborates with the Department of Health in educational activities designed to augment the skills of health professionals. Areas of focus include diabetes, weight management to combat obesity, HIV and AIDS and maternal and early childhood nutrition.

Through tailor-made programmes the Nutrition Department promotes the nutritional training of health workers in public and private health institutions, emphasising the synergistic benefit of partnerships by supporting the Department of Health’s educational activities. In addition other work includes updating nursing educators in nursing
campuses on changes in nutrition information and nutrition policies. The industry supports additions to the scientific body of knowledge by funding medical nutrition research projects undertaken by reputable academic institutions.

The custodians responsible for improving and maintaining the health of South African citizens are the health professionals employed in private and public institutions. Considering how technology develops and how scientific breakthroughs are published every day together with how the human resources are stretched to the limit, the success of adequately catering to this huge responsibility becomes a challenge.

The Nutrition Department plays an important role in contributing to this challenge through the provision of recent nutrition information aligned to the country’s health policies to health professionals with minimal disruption to their service provision.

Health professionals are assisted in their efforts to educate the community on nutrition by being provided with educational materials that can be used during discussions and taken home by their clients. Booklets to assist health workers and counsellors in giving advice on nutrition and scientific information are provided, and these are also used by professionals to share information with colleagues that were unable to attend workshops or conferences.

Prevention of ill-health as early as possible in a person’s life is important in improving the health profile of South Africans. This is a paradigm shift that requires teachers in schools to implement without prior adequate training in nutrition and health. The industry fills this gap by providing nutrition training in the form of one day workshops in collaboration with the Department of Health and Department of Education that transfers scientific but practical nutrition information to teachers and students.
PURSUITING TRADE AND AFRICAN ADVANCEMENT

MARKET COMPETITIVENESS

According to independent surveys of the costs of production of more than 100 global sugar industries producing sugar from both cane and beet, the South African sugar industry consistently ranks amongst the top 15 sugar producers in the world. Its excellent export infrastructure, world-renowned agricultural and industrial research platforms and efficient industry organisation are key drivers of excellence.

Despite its comparative production efficiencies, the South African sugar industry finds it difficult at times to export profitably to the world market, as the global sugar price is severely affected by subsidy-induced overproduction in some major sugar-producing countries. Sugar remains one of the most distorted international commodities and will remain so in the absence of multilateral reform and liberalisation.

INTERNATIONAL TRADE

Access to major markets for raw and refined sugar is restricted by high tariffs and preferential trade arrangements such as tariff-rate quotas. These same global market distortions also threaten the maintenance of a profitable and sustainable sugar price on the domestic market. Just less than 2% of the industry’s production on average enters foreign markets under preferential market access arrangements. The majority of sugar exported must therefore be sold on the volatile world market.

Government’s strategic support for the South African sugar industry recognises the distorted nature of the world market for sugar, and the severe impact of prevalent producer support measures on price determination on the global market. Based on these considerations government support includes intervention in the following three areas: tariff protection against disruptively low world sugar prices; provision for the establishment of equitable export obligations for millers and growers; and support for the Sugar Cooperation Agreement between the members of the Southern African Development Community. Globally, South Africa remains one of the least regulated producers of sugar.

TARIFF PROTECTION

The industry, together with that of Swaziland, as the two industries are located within the Southern African Customs Union, is supported through a dollar-based reference price tariff system, which only delivers protection when the world price drops below a reference price. The sugar industry addresses matters relating to an effective tariff protection with the Department of Trade and Industry and the International Trade Administration Commission on an on-going basis.

EQUITABLE EXPORT OBLIGATIONS

The profitability of the industry’s exports to the world market is severely affected by subsidy-induced oversupply of global demand. The South African sugar industry exports approximately 25% of its sugar production to the world market at prices which are normally substantially below the domestic sugar price. World market prices have historically trended below the average global cost of production. The Sugar Act and associated Sugar Industry Agreement provide regulatory support in the distribution of exposure to the world market equitably amongst growers and millers.
REGIONAL TRADE

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

The Southern African Development Community (SADC) has 15 member states, 11 of whom produce sugar. Within SADC, South Africa is the largest sugar producer. A Sugar Co-operation Agreement has been established and is incorporated into the SADC Trade Protocol. To advance the objectives of the Agreement a Regional Sugar Strategy and associated Action Plan have been developed.

The main objectives of the Agreement are:

• To promote, within the region, production and consumption of sugar and sugar-containing products according to fair trading conditions and an orderly regional market in sugar for the survival of the sugar industries in all sugar producing member states, in anticipation of freer global trade;

• To create a stable climate for investment, leading to growth and development of sugar industries in the member states;

• To improve the competitiveness of the sugar-producing member states in the world market;

• To facilitate the sharing of information, research and training with a view to improve the efficiency of growers, millers and refiners of sugar in member states;

• To facilitate the development of small and medium sugar enterprises; and

• To create stable market conditions in the member states so as to encourage the development of all sugar industries with a view of facilitating direct foreign investment and the creation of employment opportunities.

To support the objectives of the Agreement a Federation of SADC Sugar Producers was established, of which the SA industry is an active member.
BUILDING AND SUSTAINING NATURAL CAPITAL

The South African sugar industry supports government in its international commitments to reduce greenhouse gas emissions, build and sustain natural capital and progressively implement alternative renewable energy sources into the national energy mix. The South African sugar industry recognises that as a user of natural capital stocks and producer of renewable energy biomass stocks, it has the potential to make a significant contribution to government’s objectives in the area of sustainable resource use and management, renewable energy and in creating green jobs.

SUSTAINABLE RESOURCE USE AND MANAGEMENT

South Africa has developed some of the best environmental and natural resource legislation in the world. In recent years, government together with environmental organisations are mobilising major regulations contained in the suite of environmental legislation, including air, land and water legislation. The South African sugar industry’s commitment to sustainability, good stewardship and compliance of legislation is evident in its support of the Sustainable Sugarcane Farm Management System (SUSFARMS®) and other International Organisation for Standardisation (ISO) standards implemented in sugarcane agriculture and sugar production.

The great localisation benefit of SUSFARMS® lies in it being developed by the growers for the growers. It is a farming system designed to encourage sustainable sugarcane production through the implementation of better management practices (BMPs). These BMPs are designed to reduce negative impacts on the environment, comply with legislation, maintain a high level of social responsibility and support financial sustainability. BMPs are based on knowledge derived from scientific studies, or in the absence of such data, on best available knowledge.

SUSFARMS® is in keeping with the worldwide trend towards sustainable agricultural production and can effectively demonstrate best practice to regulators and industry stakeholders. The three principles of sustainability, namely prosperity, planet and people, embody the SUSFARMS® framework.

PROSPERITY: The economic principle whereby economically viable sugarcane production is maintained or enhanced;

PLANET: The environmental principle whereby natural assets are conserved, critical ecosystems services are maintained and agricultural resources are sustainably used; and

PEOPLE: The social principle whereby the rights of employees and the local community are upheld and promoted.

Interventions underpinned by years of experience in sugarcane research and development, locally embedded environmental committees promoting BMPs and collaborative partnerships with organisations such as the World Wide Fund for Nature, and the Wildlife and Environment Society of South Africa, further promote and facilitate sustainable environmental management in the sugar industry.
RENEWABLE ENERGY

Renewable energy in South Africa is rapidly becoming a political imperative. Driven by imperatives such as protection of the environment and reduced carbon emissions, employment creation and security of energy supply, the South African government has committed to the use of renewable energy sources. Globally, leading internationally competitive sugarcane industries have responded to the growing need for renewable energy, by diversifying from being producers of sugar only to producing sugar and energy. The sugar industry advocates this transformation in South Africa through full utilisation of the sugarcane stalk, a natural renewable source for the generation of renewable electricity and bioethanol for commercial use.

At present the 14 sugar mills in South Africa are designed for energy balance, which means that they use the biomass called bagasse, produced during the processing of sugarcane, to generate steam and electricity for their own internal needs. However, the mills have the capacity to inject significant amounts of surplus power into the national grid.

The industry currently produces industrial and potable ethanol however; with the appropriate government support mechanism in place it could also supply fuel ethanol for blending into the national fuel pool. A transformed and thriving sugarcane agro-processing industry commercially supplying sugar, electricity and bioethanol would assist in reducing power losses, contribute to national grid capacity and stability and, diversify the national petroleum fuel pool.

Most important a viable market for electricity and fuel ethanol production from sugarcane will enable the industry to rapidly expand its already very considerable contribution to the national socio-economic imperatives of South Africa and support the South African government in addressing its key priorities of poverty, inequality and job creation. A distinguishable feature would be the quantity and quality of jobs that could be created compared to typical renewable energy job creation; ranging from construction and operations, to the agricultural opportunities that relate to the production of the primary fuel, sugarcane.
INDUSTRY STRUCTURE

COUNCIL OF THE SA SUGAR ASSOCIATION

The South African Sugar Association administers the partnership on behalf of the South African Cane Growers’ Association and the South African Sugar Millers’ Association Ltd. As equal partners, each member elects eleven councillors to sit on the SA Sugar Association Council. The Chairmanship and Vice-Chairmanship of Council usually alternates every two years between a grower and a miller.

The South African Sugar Association is an autonomous organisation and operates free of government control. In terms of the Sugar Act and Sugar Industry Agreement, statutory powers of self governance are granted to the sugar industry.

The South African Sugar Association’s administrative and industrial activities and organisations are financed from the proceeds of the sale of local and export sugars. Its affairs are administered by the Council of the SA Sugar Association.
CANE GROWING IN SOUTH AFRICA
The approximately 23,866 registered sugarcane growers annually produce on average 18.8 million tons of sugarcane from 14 mill supply areas, extending from Northern Pondoland in the Eastern Cape to the Mpumalanga Lowveld. Approximately 22,453 are small-scale growers, of whom 11,846 delivered cane last season, producing 8.26% of the total crop.

There are approximately 1,413 large-scale growers (inclusive of 323 black emerging farmers) who produce 83.8% of total sugarcane production. Milling companies with their own sugar estates produce 7.94% of the crop.

SA CANE GROWERS’ ASSOCIATION

The South African Cane Growers’ Association (CANEGROWERS) was established in 1927 to administer the interests of independent sugarcane growers. CANEGROWERS is a non-profit company and individual growers are members through the 26 grower groups which make up the member organisations of CANEGROWERS. In each mill area all member organisations are represented by a Local Grower Council.

The democratic nature of the representation structure allows for the election of any individual cane farmer to the Executive Committee or Chairmanship of the organisation. This, typically, would be through a region’s Local Farmers’ Association, its Local Grower Council, the centrally based Board of Directors (54 members) from which a Chairman and Vice-Chairman are elected annually, and finally to the Executive Committee (11 members). An Executive Director, management team and staff administer the day to day business of CANEGROWERS, to:

• Ensure that cane growers receive fair value for their sugarcane.

• Provide cane growers with relevant research, data and support services to facilitate successful farming regions.

• Ensure that CANEGROWERS is recognised by all stakeholders as the duly mandated and effective representative of all cane growers in South Africa.
The milling sector employs upwards of 7,000 people at 14 sugar mills and at the companies’ administration offices in KwaZulu-Natal and Mpumalanga. Illovo Sugar (South Africa) Ltd and Tongaat Hulett Sugar South Africa Ltd own four mills each while Tsb Sugar Holdings (Pty) Ltd owns three mills. Gledhow Sugar Company (Pty) Ltd, UCL Company (Pty) Ltd and Umfolozi Sugar Mill (Pty) Ltd own one mill each. Two of the mills are located in the Mpumalanga Province while the remainder of the mills are located in the KwaZulu-Natal Province.

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

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

Utilising all the potential of the sugar cane plant is the key factor in today’s highly integrated sugar milling operations. Other than producing high quality sugars of international standard, milling companies produce a range of other products from the processing of sugar cane. Amongst these are chemical products e.g. alcohol and furfural, as well as animal feeds. The milling sector, through the milling process, has significant potential to manufacture environmentally friendly renewable energy through the generation of electricity for the national grid and the production of fuel grade ethanol. However, in order to achieve this, a legislative framework is required.
THE SOUTH AFRICAN SUGAR MILLERS’ ASSOCIATION NPC

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

The Association is administered by an executive director and staff who undertake these activities and who interact with the other organisations on matters concerning the industry, particularly CANEGROWERS and the South African Sugar Association.

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

ILLOVO SUGAR (SOUTH AFRICA) LIMITED
Illovo Sugar (South Africa) Limited operates four sugar mills in South Africa, one of which has a refinery and two which have packaging plants. It has three cane growing estates and, in addition to producing speciality sugars and syrup, also produces a variety of high-value downstream products.

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

TSB SUGAR HOLDINGS (PTY) LTD
Tsb Sugar Holdings (Pty) Limited operates three sugar mills two of which have refineries, a packaging plant, sugar estates, cane and sugar transport and an animal feed division.

GLEDHOW SUGAR COMPANY (PTY) LIMITED
Conveniently located at KwaDukuza, 75kms north of Durban, Gledhow is the youngest, fastest growing, and most diverse sugar company in South Africa. Ownership is spread across four distinct and complementary shareholders (Ushukela Milling, Illovo Sugar, the Gledhow Growers and Sappi). The Mill produces refined sugar to EEC2 standard, and supplies this sugar to the food and beverage industries in Southern Africa.

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

UMFOLOZI SUGAR MILL (PTY) LIMITED
The Umfolozi Mill is owned by two shareholders. The first is a group of cane growers with cane growing interests comprising a large cane growing company to the south, the largest cane grower in northern KwaZulu-Natal and an unlisted public company whose shareholders grow sugar cane on the Umfolozi flats. The second is a large alcohol producing company in Durban. The Umfolozi Sugar Mill (Pty) Ltd bags high quality VHP brown sugar for sale into the industrial and retail markets.
The South African Sugar Association (SASA) provides a range of specialist services that enhance the profitability, global competitiveness and sustainability of the South African sugar industry.

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

**INDUSTRY AFFAIRS**

Administrating and facilitating adherence to the Sugar Act, the Sugar Industry Agreement and the SASA Constitution, is the responsibility of SASA’s Industry Affairs Division.

Joint decision-making on all matters affecting the partnership that fall within the scope of the legislation and agreements governing the industry is undertaken by grower and miller representatives through their participation in the meetings of the SASA Council and its numerous committees. The Industry Affairs Division is responsible for the administration of this important and complex decision-making process.

The division’s key performance areas include Partnership Support and Secretariat services, responsibility for the Division of Proceeds and Grower Administration.

**CANE TESTING SERVICE**

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

**NATIONAL MARKET**

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

**INTERNATIONAL MARKETING**

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

**EXTERNAL AFFAIRS**

This division operates in a range of areas that require specialist external communication skills, with a focus on international and regional trade issues, renewable energy, environment, development, land reform,
nutrition, stakeholder communication, and specialised publications. The division also administers the Sugar Industry Trust Fund for Education.

External Affairs is responsible for the development and maintenance of stakeholder relationships and the monitoring of local, regional and global trade policies affecting the South African sugar industry. This includes representation on the International Sugar Organisation, the Global Alliance for the Liberalisation of Sugar Markets, the SADC Technical Committee on Sugar, and the World Sugar Research Organisation. External Affairs also liaises with other relevant international organisations such as the World Trade Organisation, Food and Agriculture Organisation and the International Fund for Agricultural Development. The work programme addresses a wide range of key audiences through direct contact with private enterprise, government and non-governmental organisations.

SOUTH AFRICAN SUGARCANE RESEARCH INSTITUTE

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

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

- **Variety Improvement** seeks to breed and select high yielding, pest and disease resistant varieties that meet industry requirements, using both conventional breeding and modern molecular technologies. Improving efficiencies in the development of superior sugarcane varieties and enabling appropriate variety choices for cultivation are key focus areas.
Crop Protection research is aimed at minimising the impact of weeds, pests and diseases on crop yields in environmentally and economically sustainable ways. Emphasis is placed on:
(1) developing integrated pest and disease management practices; and (2) mitigating potential biosecurity threats through the development of proactive countermeasures and threat-specific incursion plans.

The Crop Performance and Management programme focuses on enabling production of high quality sugarcane through the development of management practices to support appropriate use of chemical ripeners, fertilisers and soil amendments. Additional focus is placed on optimising water use and harvesting practices.

The Systems Design and Optimisation programme is directed towards investigating and developing innovative systems that optimise crop production through modeling, technology design and a farming systems approach. Development of appropriate technology transfer tools and practices is recognised as fundamental to improved adoption of research advice and sustainable sugarcane production.

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

A range of specialist and advisory services is provided to the industry. These services include biosecurity, biosafety, quarantine facilities and expertise, alien invasive weed biocontrol, crop forecasting, climate and related data, real time irrigation advice, specialist advice on policy development and implementation, GIS and mapping support. Other services are provided on a user-pays basis including specialist advice on grower problems as well as soil and leaf analyses through the Fertiliser Advisory Service (FAS), an RSD diagnostic service, variety fingerprinting and testing of new agrochemicals. Short courses in Sugarcane Agriculture at the junior and senior levels are also held annually.

Left: Meshack Doncabe, FAS Assistant checking ground cane leaf sample
The Shukela Training Centre, an accredited training provider, is a wholly owned subsidiary of the South African Sugar Association (SASA). STC, established in 1972, is dedicated to providing apprentice and maintenance-worker training as well as agricultural skills training.

The STC is the preferred training provider for the sugar industries in South Africa and SADC, numerous companies and some private individuals. The on-site accommodation and associated catering service allow companies from a wide geographical area to benefit from the services of our excellent facility.

The Centre is fully accredited with the relevant Sectoral Education and Training Authorities (SETAs) and is an accredited de-centralised trade test centre. These accreditations allow STC to provide training across a wide spectrum of disciplines in the engineering and agricultural arena. The STC is expanding its present scope of agricultural training over and above the Certificate in Plant Production, NQF level 4.

The STC has a well-respected reputation for the provision of high quality training and learners exiting from STC know that they have achieved their qualification in accordance with the national standards required. For more details, please visit our website on http://www.sasa.org.za/divisions/ShukelaTrainingCentre/OverviewofSTC.aspx

Through Autolab, the division provides expert support and development of the Sugar Industry Laboratory Information Management Systems (LIMS) utilised by all sugar mills within South Africa. LIMS is designed to manage growers’ estimates and allocations, and provides the source data for determining payments for sugar deliveries by growers. Autolab also develops and maintains the systems that track sugarcane through the milling process for the purpose of sampling and testing by the mills and Cane Testing Service (CTS) laboratories.

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

Umthombo Agricultural Finance provides savings facilities and administers loans for small-scale growers in the KwaZulu-Natal, Eastern Cape and Mpumalanga provinces in South Africa.

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

Umthombo Agricultural Finance provides savings facilities and administers loans for small-scale growers in the KwaZulu-Natal, Eastern Cape and Mpumalanga provinces in South Africa.

**HUMAN RESOURCES**

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

In support of this need, the Human Resources Division provides a comprehensive range of services to managers and employees in SASA, all of which aim to resource the organisation with highly competent and effective people who are committed to serving the best interests of the South African sugar industry.
TOTAL CANE/SUGAR PRODUCTION:
1999/2000 TO 2012/2013

<table>
<thead>
<tr>
<th>Season</th>
<th>Cane crushed</th>
<th>Saleable sugar produced</th>
<th>National Market</th>
<th>International Market</th>
<th>Total</th>
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<td>2001/2002</td>
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<td>1 163 592</td>
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<td>2 226 869</td>
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<td>2010/2011</td>
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<td>1 909 236</td>
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<tr>
<td>2011/2012</td>
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<td>1 685 312</td>
<td>137 176</td>
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<td>1 822 488</td>
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<td>2012/2013</td>
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<td>1 701 731</td>
<td>249 785</td>
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<td>1 951 518</td>
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### CROP DATA

#### TOTAL CROP AREA:
1999/2000 TO 2012/2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Hectares harvested for milling</th>
<th>Hectares under sugarcane</th>
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<tr>
<td>1999/00</td>
<td>313 294</td>
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<tr>
<td>2000/01</td>
<td>322 858</td>
<td>428 822</td>
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<td>2001/02</td>
<td>325 704</td>
<td>431 771</td>
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<tr>
<td>2002/03</td>
<td>321 234</td>
<td>430 106</td>
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<td>2003/04</td>
<td>325 956</td>
<td>426 861</td>
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<tr>
<td>2004/05</td>
<td>318 856</td>
<td>424 907</td>
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<tr>
<td>2005/06</td>
<td>316 010</td>
<td>423 960</td>
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<tr>
<td>2006/07</td>
<td>305 600</td>
<td>419 463</td>
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<td>2007/08</td>
<td>307 380</td>
<td>412 979</td>
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<tr>
<td>2008/09</td>
<td>287 380</td>
<td>388 655</td>
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<td>2009/10</td>
<td>278 133</td>
<td>381 838</td>
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<td>2010/11</td>
<td>271 080</td>
<td>375 590</td>
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<td>2011/12</td>
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<td>367 301</td>
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<td>2012/13</td>
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<td>371 622</td>
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*estimates*

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#### CROP DATA:
1999/2000 TO 2012/2013

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<tr>
<th>Season</th>
<th>Sucrose % Cane</th>
<th>Tons cane to 1 ton sugar</th>
<th>Tons cane crushed</th>
<th>Tons sugar made</th>
<th>Yields per hectare of harvested cane</th>
<th>Rainfall June to May (mm)</th>
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<td>5,259,106</td>
<td>5,280,575</td>
<td>5,064,538</td>
<td>4,986,858</td>
<td>5,193,820</td>
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<tr>
<td>Umfolozi</td>
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<td>Felixton</td>
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<td>Darnall</td>
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<td>Gledhow (KwaDukuza)</td>
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<td>1,181,104</td>
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<td>1,222,829</td>
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<td>Total North Coast</td>
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<td>Eston</td>
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<td>Union (UCL Company)</td>
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<td>Total Midlands</td>
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<td>Sezela</td>
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## RECOVERABLE VALUE AND CANE PRICES

**2001/2002 TO 2012/2013**

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<tr>
<th>Season</th>
<th>Recoverable Value</th>
<th>Cane</th>
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<tr>
<td>2001/2002</td>
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<td>2003/2004</td>
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<td>2004/2005</td>
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<td>2005/2006</td>
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<td>2006/2007</td>
<td>1 701,86</td>
<td>198,78</td>
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<td>2007/2008</td>
<td>1 701,90</td>
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<td>2008/2009</td>
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<td>2009/2010</td>
<td>2 284,20</td>
<td>284,15</td>
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<td>2010/2011</td>
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<td>331,55</td>
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<td>2011/2012</td>
<td>3 017,51</td>
<td>352,38</td>
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<td>2012/2013</td>
<td>3 197,32</td>
<td>389,08</td>
</tr>
</tbody>
</table>
## SA SUGAR ASSOCIATION

Kwa-Shukela, 170 Flanders Drive, Mount Edgecombe 4300  
PO Box 700, Mount Edgecombe 4300

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 508 7000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>086 686 1172</td>
</tr>
<tr>
<td>Web</td>
<td><a href="http://www.sasa.org.za">www.sasa.org.za</a></td>
</tr>
</tbody>
</table>

### Executive Director
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trix.trikam@sasa.org.za

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### South African Sugarcane Research Institute Director
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### Shukela Training Centre General Manager
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### Finance Executive
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### Human Resources Executive
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**Telephone 031 508 7000**

**Fax 086 686 1172**

**Web www.sasa.org.za**

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### Cane Testing Service General Manager:
S Naidoo  
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### Commercial Director:
A Coreejes  
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### Finance Executive:
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mary.ramkelawon@sasa.org.za

### Human Resources Executive:
PJ Milner-Smyth  
penny.milner-smyth@sasa.org.za

### Cane Testing Service Regional Managers

<table>
<thead>
<tr>
<th>Region</th>
<th>Tel</th>
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<tr>
<td>North: R Jafta</td>
<td>031 508 7148</td>
<td>071 851 2574</td>
<td><a href="mailto:renee.jafta@sasa.org.za">renee.jafta@sasa.org.za</a></td>
</tr>
<tr>
<td>(Felixton, Komati, Malalane, Pongola, Umfolozi)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>South: K Naidoo</td>
<td>031 508 7142</td>
<td>082 653 6845</td>
<td><a href="mailto:kavitha.naidoo@sasa.org.za">kavitha.naidoo@sasa.org.za</a></td>
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<tr>
<td>(Eston, KwaDukuza, Maidstone, Amatikulu, Darnall, Noodsberg, Sezela, Umzimkulu)</td>
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### Cane Testing Service Managers

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<tr>
<td>Amatikulu:</td>
<td>035 331 1235</td>
<td>082 654 5706</td>
<td><a href="mailto:tracy.matthews@sasa.org.za">tracy.matthews@sasa.org.za</a></td>
</tr>
<tr>
<td>T Matthews</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Darnall:</td>
<td>032 486 1391</td>
<td>082 654 5706</td>
<td><a href="mailto:tracy.matthews@sasa.org.za">tracy.matthews@sasa.org.za</a></td>
</tr>
<tr>
<td>T Matthews</td>
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</tr>
<tr>
<td>Eston:</td>
<td>031 781 8327</td>
<td>071 851 2574</td>
<td><a href="mailto:predhie.naidoo@sasa.org.za">predhie.naidoo@sasa.org.za</a></td>
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<tr>
<td>P Naidoo</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Felixton:</td>
<td>035 791 5020</td>
<td>082 653 6843</td>
<td><a href="mailto:vinesh.folly@sasa.org.za">vinesh.folly@sasa.org.za</a></td>
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<tr>
<td>V Folly</td>
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<tr>
<td>Komati:</td>
<td>013 723 4152</td>
<td>082 654 5436</td>
<td><a href="mailto:jeffrey.mhlongo@sasa.org.za">jeffrey.mhlongo@sasa.org.za</a></td>
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<tr>
<td>JB Mhlongo</td>
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### Cane Testing Service Managers continued

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<th>Location</th>
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<tr>
<td>KwaDukuza:</td>
<td>A Maharaj</td>
<td>032 551 3031</td>
<td>082 653 6846</td>
<td><a href="mailto:arvin.maharaj@sasa.org.za">arvin.maharaj@sasa.org.za</a></td>
</tr>
<tr>
<td>Maidstone:</td>
<td>A Maharaj</td>
<td>032 944 6637</td>
<td>082 653 6846</td>
<td><a href="mailto:arvin.maharaj@sasa.org.za">arvin.maharaj@sasa.org.za</a></td>
</tr>
<tr>
<td>Malalane:</td>
<td>DM Harris</td>
<td>013 791 1224</td>
<td>082 328 0014</td>
<td><a href="mailto:david.harris@sasa.org.za">david.harris@sasa.org.za</a></td>
</tr>
<tr>
<td>Noodsberg:</td>
<td>V Mohabir</td>
<td>033 501 1479</td>
<td>082 651 7359</td>
<td><a href="mailto:vishal.mohabir@sasa.org.za">vishal.mohabir@sasa.org.za</a></td>
</tr>
<tr>
<td>Pongola:</td>
<td>J Dheopursad</td>
<td>034 413 8165</td>
<td>083 291 6665</td>
<td><a href="mailto:neil.dheopursad@sasa.org.za">neil.dheopursad@sasa.org.za</a></td>
</tr>
<tr>
<td>Sezela:</td>
<td>M Cele</td>
<td>039 975 1106</td>
<td>071 853 4879</td>
<td><a href="mailto:musa.cele@sasa.org.za">musa.cele@sasa.org.za</a></td>
</tr>
<tr>
<td>Umfolozi:</td>
<td>FAM Mathaba</td>
<td>035 550 0531</td>
<td>071 851 2461</td>
<td><a href="mailto:vusi.mathaba@sasa.org.za">vusi.mathaba@sasa.org.za</a></td>
</tr>
<tr>
<td>Umzimkulu:</td>
<td>M Cele</td>
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<td>071 853 4879</td>
<td><a href="mailto:musa.cele@sasa.org.za">musa.cele@sasa.org.za</a></td>
</tr>
</tbody>
</table>

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**Telephone:** 031 508 7107

**SA Sugar Terminal**
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PO Box 61104, Bishopsgate 4008

**Telephone:** 031 365 8100

**Tour Centre**

**Telephone:** 031 365 8153

**Email:** tourguide@sasa.org.za

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### AUTOLAB

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**Email:** shukela.training@sasa.org.za
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<thead>
<tr>
<th></th>
<th>Email</th>
<th>Tel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liaison – Knowledge Manager: M Binedell</td>
<td><a href="mailto:michelle.binedell@sugar.org.za">michelle.binedell@sugar.org.za</a></td>
<td>031 508 7567</td>
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<tr>
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<tr>
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</tr>
<tr>
<td>Diagnostic and Analytical Services</td>
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<td>031 508 7528</td>
</tr>
<tr>
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<td><a href="mailto:sars@sugar.org.za">sars@sugar.org.za</a></td>
<td>031 508 7401</td>
</tr>
<tr>
<td>Library</td>
<td><a href="mailto:library@sugar.org.za">library@sugar.org.za</a></td>
<td>031 508 7514</td>
</tr>
<tr>
<td>Human Resources</td>
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<td>031 508 7505</td>
</tr>
<tr>
<td>Education</td>
<td><a href="mailto:educane@sugar.org.za">educane@sugar.org.za</a></td>
<td>031 508 7405</td>
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### SA Sugarcane Research Institute Extension Specialists

<table>
<thead>
<tr>
<th></th>
<th>Tel</th>
<th>Cell</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SASRI MOUNT EDGECOMBE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extension Manager: GW Maher</td>
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<td>082 654 0056</td>
<td><a href="mailto:geoff.maher@sugar.org.za">geoff.maher@sugar.org.za</a></td>
</tr>
<tr>
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<td>082 654 3547</td>
<td><a href="mailto:bongi.bengu@sugar.org.za">bongi.bengu@sugar.org.za</a></td>
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<tr>
<td><strong>SOUTH COAST REGION</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Extension Specialist: South Coast: D McElligott</td>
<td>039 975 1377</td>
<td>083 655 5012</td>
<td><a href="mailto:dirk.mcelligott@sugar.org.za">dirk.mcelligott@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Land Reform Growers: J Nkala</td>
<td>039 682 1822</td>
<td>082 653 3151</td>
<td><a href="mailto:joe.nkala@sugar.org.za">joe.nkala@sugar.org.za</a></td>
</tr>
<tr>
<td>Regional Extension Specialist: Lower South Coast: J Bowley</td>
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<td>082 654 3546</td>
<td><a href="mailto:justin.bowley@sugar.org.za">justin.bowley@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Midlands South: P Botha</td>
<td>031 302 2847</td>
<td>082 655 0356</td>
<td><a href="mailto:william.gillespie@sugar.org.za">william.gillespie@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Small-scale Growers: WA Gillespie</td>
<td>031 302 2847</td>
<td>082 655 0356</td>
<td><a href="mailto:william.gillespie@sugar.org.za">william.gillespie@sugar.org.za</a></td>
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<tr>
<td><strong>NORTH COAST REGION</strong></td>
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<tr>
<td>Regional Extension Manager: Vacant</td>
<td></td>
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</tr>
<tr>
<td>Extension Specialist: Land Reform Growers (North Coast): IN Hlongwa</td>
<td>032 947 1410</td>
<td>082 654 3536</td>
<td><a href="mailto:nathi.hlongwa@sugar.org.za">nathi.hlongwa@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Midlands North: D Wilkinson</td>
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<td>082 654 3549</td>
<td><a href="mailto:david.wilkinson@sugar.org.za">david.wilkinson@sugar.org.za</a></td>
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### NORTH COAST REGION cont.

<table>
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<tr>
<th>Extension Specialist: Small-scale Growers:</th>
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<tr>
<td>P Ngcobo</td>
<td>032 947 1410 082 655 0358</td>
<td><a href="mailto:patrick.ngcobo@sugar.org.za">patrick.ngcobo@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: North Coast: A Naude</td>
<td>032 947 1410 082 653 3144</td>
<td><a href="mailto:adrean.naude@sugar.org.za">adrean.naude@sugar.org.za</a></td>
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### ZULULAND REGION

<table>
<thead>
<tr>
<th>Regional Extension Manager:</th>
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<th>Email</th>
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<tbody>
<tr>
<td>RR Fortmann</td>
<td>035 772 5871 082 653 3150</td>
<td><a href="mailto:tom.fortmann@sugar.org.za">tom.fortmann@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Zululand North:</td>
<td>035 772 5871 082 653 3150</td>
<td><a href="mailto:tom.fortmann@sugar.org.za">tom.fortmann@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Zululand South:</td>
<td>035 337 1593 082 653 3147</td>
<td><a href="mailto:gary.lagerwall@sugar.org.za">gary.lagerwall@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Small-scale Growers (Zululand South):</td>
<td>035 474 5217 082 653 3149</td>
<td><a href="mailto:john.neen@sugar.org.za">john.neen@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Small-scale Growers (Zululand North):</td>
<td>034 413 1215 082 613 8819</td>
<td><a href="mailto:sifiso.hlela@sugar.org.za">sifiso.hlela@sugar.org.za</a></td>
</tr>
<tr>
<td>Extension Specialist: Land Reform Growers (Zululand):</td>
<td>035 772 5871 082 653 3148</td>
<td><a href="mailto:thulani.masondo@sugar.org.za">thulani.masondo@sugar.org.za</a></td>
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### NORTHERN IRRIGATED REGION

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<tr>
<th>Extension Specialist: Small-scale Growers (Komatipoort/ Malelane):</th>
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<tr>
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**FINANCE**

| Telephone | 031 508 7051 |

**HUMAN RESOURCES**

| Telephone | 031 508 7016 |

*Below: Vincent Perumel, FAS Technician analysing sample using an Atomic Absorption Spectroscopy.*
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Website www.sacanegrowers.co.za

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Fax 035 337 1481

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Fax 032 486 1519

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Telephone 031 781 2000
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Telephone 035 772 3110
Fax 035 772 5477

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Fax 032 944 2787

Mpumalanga: A du Preez, PO Box 1379, Malalane 1320
Telephone 013 790 0230
Fax 013 790 0231

Contact

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Email</th>
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<tr>
<td>Executive Director:</td>
<td>DB Wayne</td>
<td><a href="mailto:David.Wayne@canegrowers.co.za">David.Wayne@canegrowers.co.za</a></td>
</tr>
<tr>
<td>Director Regional Services:</td>
<td>KM Hurly</td>
<td><a href="mailto:Kathy.Hurly@canegrowers.co.za">Kathy.Hurly@canegrowers.co.za</a></td>
</tr>
<tr>
<td>Director Industrial Affairs:</td>
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<td><a href="mailto:Thomas.Funke@canegrowers.co.za">Thomas.Funke@canegrowers.co.za</a></td>
</tr>
<tr>
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</tr>
<tr>
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</tr>
<tr>
<td>Communications Manager:</td>
<td>JA Ferguson</td>
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</tr>
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</table>
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Fax: 033 503 1822

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Fax: 039 682 5420

**Union:** SP Love, PO Box 1, Dalton 3236  
Telephone: 033 501 1600  
Fax: 033 501 1187

REGIONAL MANAGERS

<table>
<thead>
<tr>
<th>REGION</th>
<th>MANAGER NAME</th>
<th>MANAGER ADDRESS</th>
<th>TELEPHONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mpumalanga</td>
<td>JJ Murray</td>
<td>170 Flanders Drive, Mount Edgecombe 4302</td>
<td>013 790 0305</td>
</tr>
<tr>
<td>North Coast</td>
<td>B Nothard</td>
<td>Darnall/Maidstone/Gledhow</td>
<td>032 947 0176</td>
</tr>
<tr>
<td>South Coast</td>
<td>G Ducasse</td>
<td>Umzimkulu</td>
<td>039 682 5122</td>
</tr>
<tr>
<td>South Coast</td>
<td>W Gilham</td>
<td>Sezela</td>
<td>039 975 2078</td>
</tr>
<tr>
<td>Zulaland</td>
<td>R Howes</td>
<td>Felixton</td>
<td>035 772 3110</td>
</tr>
<tr>
<td>Zulaland</td>
<td>–</td>
<td>Mtubatuba/Pongola</td>
<td>035 550 0237</td>
</tr>
<tr>
<td>Tugela</td>
<td>J Lloyd</td>
<td>Amatikulu</td>
<td>035 337 1135</td>
</tr>
<tr>
<td>Midlands</td>
<td>C Breetzke</td>
<td>Noodsberg/UCL</td>
<td>033 503 1820</td>
</tr>
<tr>
<td>Midlands</td>
<td>G Mashile</td>
<td>South (Eston)</td>
<td>031 781 2000</td>
</tr>
</tbody>
</table>

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PO Box 557, Mount Edgecombe 4300

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Vice-Chairman: CJ Alexander;  
Field Manager: IM Stewart
SA SUGAR MILLERS’ ASSOCIATION NPC

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Fax: 031 508 7310
Email: sasmal@sasa.org.za

Executive Director: DP Rossler; Company Secretary: KL Lansdell

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T Spencer tspencer@illovo.co.za
Cane Supply Manager: J De Lange
J De Lange jdlange@illovo.co.za
Factory Manager: R Talanda
R Talanda rtalanda@illovo.co.za
Human Resources Manager: E Sibiya
E Sibiya esibiya@illovo.co.za

Sezela Mill
PO Sezela 4215

Telephone 039 975 8000
Fax 039 975 8296

General Manager: L Bachan
L Bachan lbachan@illovo.co.za
Administration Manager: W Bennett
W Bennett wbennett@illovo.co.za
Agricultural Manager:
E Bruggemann ebruggemann@illovo.co.za
Cane Supply Manager: T Khwela
tkwela@illovo.co.za
Factory Manager Downstream products: C Kruger
C Kruger ckruiger@illovo.co.za
Factory Manager: J Jansen van Rensburg
J Jansen van Rensburg jvrensburg@illovo.co.za
Human Resources Manager: C Gwala
cgwala@illovo.co.za

Umzimkulu Mill
PO Box 59, Port Shepstone 4240

Telephone 039 682 4202
Fax 039 682 4126

General Manager: V Pillay
V Pillay vspillay@illovo.co.za
Administration Manager: V Pillay
V Pillay vicpillay@illovo.co.za
Agricultural Manager: G Massey
G Massey gmassey@illovo.co.za
Factory Manager: H van der Heever
H van der Heever hvderheever@illovo.co.za
Human Resources Manager: S Zuma
S Zuma szuma@illovo.co.za
Cane Supply Manager: R Singh
R Singh rsingh@illovo.co.za
TONGAAT HULETT SUGAR SOUTH AFRICA LIMITED

CORPORATE OFFICE
Private Bag 3, Glenashley 4022
Amanzimnyama Hill Road, Tongaat 4399

Email: noxolo.goqo@tongaat.com
Telephone: 032 439 4316
Website: www.huletts.co.za

Managing Director (SA): MN Mohale;
TH Internal Consultant: BG Dunlop;
Milling Executive Director: D van den Berg;
Executive Director – Technology Management: DM Meadows;
Executive Director – Human Resources (SA): JD Bhana;
Executive Director – Business Services (SA): LJ Munro;
Commercial Manager (SA): MR Fell;
Industry Affairs Manager (SA): TB Ngeleza

TECHNOLOGY AND ENGINEERING GROUP
Private Bag 3, Glenashley 4022
No.1 Amanzimnyama Hill Road, Tongaat 4399

Email: celia.lund@tongaat.com
Telephone: 032 439 4455 / 032 439 4342

Operations Group Leader: PM Schorn;
Projects Group Leader: R Govender;
Development Group Leader: C Jensen;
Operations Specialist: R Rambaram;
Project Support Specialist: AB Hlatshwayo

TONGAAT HULETT SUGAR – REFINERY
PO Box 1501, Durban 4000

Email: loretta.mead@tongaat.com
Telephone: 031 460 0102

Executive Director - Refinery: R Govender;
General Manager: M Moodley;
Technical Services Manager: D Govender;
HR Manager: T Campbell; Financial Manager: P Scott;
Technical Manager: N Padayachee

TONGAAT HULETT SUGAR – MARKETING, SALES AND DISTRIBUTION
PO Box 1501, Durban 4000

Email: lindiwe.ntsolo@tongaat.com
Telephone: 031 460 0305

General Manager - Marketing: PM Dickinson;
Marketing Manager: A Randeria; Trade Marketing Manager:
R Zwane; Manager - Industrial Marketing/Cape Sweeteners:
GB Armstrong; Product Development Manager: Z Sithole;
HR Manager: N Mshengu;
Warehousing and Distribution Manager: SL Paul

VOERMOL FEEDS (PTY) LTD
PO Box 13, Maidstone 4380

Email: madelaine.penn@tongaat.com
Telephone: 032 439 5856

Managing Director: PT Strydom;
Technical Manager: S Breytenbach;
Business Services Manager: G Lovell
AGRICULTURAL OPERATIONS (SA)
Off Watson Highway, Tongaat Estate, 4399
Private Bag X50, Tongaat, 4400

Email            kanthi.naidoo@tongaat.com
Telephone        032 438 3500

General Manager: PW Russell;
Business Services Manager: MC Govender;
HR Manager: A Nkabane

Amatikulu Mill
Private Bag Amatikulu 3801

Email            ntonhle.conco@tongaat.com
Telephone        035 331 9000
Fax              035 331 1377

General Manager: M Ninela;
Production Manager: S Zuma;
Cane Supply and Transport Manager: L Viljoen;
Engineering Manager: A Balouza

Felixton Mill
Private Bag X02, Felixton 3875

Email            ntonhle.conco@tongaat.com
Telephone        035 791 5000

General Manager: P Masinga;
Cane Supply and Transport Manager: B Robertson;
Human Resources Manager: BV Lane;
Engineering Manager: D Dlamini

Darnall Mill
PO Darnall 4480

Email            glenda.bailey@tongaat.com
Telephone        032 439 9111

General Manager: N Simmonds;
Production Manager: S Maharaj;
Supply Chain Manager: J van Niekerk;
Human Resources Manager: K Nxlele

Maidstone Mill
PO Box 5, Maidstone 4380

Email            amanda.toerien@tongaat.com
Telephone        032 439 5511

General Manager: CN Soji;
Engineering Manager: C Lewis;
Production Manager: N Rajoo;
Supply Chain Manager: G Corson;
Human Resources Manager: S Narraidu
**TSB SUGAR HOLDINGS (PTY) LIMITED**

Head Office: PO Box 47, Malalane 1320

<table>
<thead>
<tr>
<th>Telephone</th>
<th>013 791 1000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>013 790 0769</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:information@tsb.co.za">information@tsb.co.za</a></td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.tsbsugar.co.za">www.tsbsugar.co.za</a></td>
</tr>
</tbody>
</table>

Chief Executive Officer: JM du Plessis;
Director Finance: IG van der Walt;
Chief Operating Officer Agriculture: D van Rooy;
General Manager Human Resources: A Ndlovu-Wudebwe;
General Manager Marketing: PC Harland;
General Manager Corporate Affairs: VF Khoza;
Chief Operating Officer Manufacturing: ID van Niekerk;
Company Secretary: JF de Villiers

**Komati Mill**
PO Box 69, Komatipoort 1340

<table>
<thead>
<tr>
<th>Telephone</th>
<th>013 723 4860</th>
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<tbody>
<tr>
<td>Fax</td>
<td>013 723 4444</td>
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General Manager: GM Rolfe

**Malalane Mill**
PO Box 47, Malalane 1320

<table>
<thead>
<tr>
<th>Telephone</th>
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<tbody>
<tr>
<td>Fax</td>
<td>013 791 1231</td>
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</table>

General Manager: C Vermeulen

**Pongola Mill**
PO Box 23, Pongola 3170

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 731 1000</th>
</tr>
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<tbody>
<tr>
<td>Fax</td>
<td>031 730 0095</td>
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</table>

General Manager: TD Endres

**MOLATEK ANIMAL FEEDS**
PO Box 47, Malalane 1320

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 791 1036</th>
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<tbody>
<tr>
<td>Fax</td>
<td>031 790 0095</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:molatek@tsb.co.za">molatek@tsb.co.za</a></td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.molatek.co.za">www.molatek.co.za</a></td>
</tr>
</tbody>
</table>

General Manager: GS du Plessis

**DURBAN OFFICE**
PO Box 800, Mount Edgecombe 4300
170 Flanders Drive, Mount Edgecombe 4300

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 508 7320</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>031 508 7329</td>
</tr>
</tbody>
</table>

Manager Sugar Industry Affairs: BJ Rogers

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 508 7323</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
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</tr>
</tbody>
</table>

Export Manager: C Smit

**TSB SUGAR – MARKETING, SALES AND DISTRIBUTION**
Quality Sugars (Pty) Limited
PO Box 4477, Midrand 1685

<table>
<thead>
<tr>
<th>Telephone</th>
<th>011 254 0200</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>011 312 2525</td>
</tr>
</tbody>
</table>

Managing Director Quality Sugars: PC Harland
GLEDOHOW SUGAR COMPANY (PTY) LIMITED

PO Box 55, Stanger 4450

<table>
<thead>
<tr>
<th>Telephone</th>
<th>032 437 4400</th>
</tr>
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<tbody>
<tr>
<td>Fax</td>
<td>032 552 1888</td>
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</table>

Directors: DE Howells; LW Riddle; Dr MP Sokhela; GO O’Connor; PB McGrady; GC Heenan;
Alternate: AD Goble; SG Dlamini;
Executive Vice Chairman: JPM de Robillard;
General Manager: SD Langton

UCL COMPANY (PTY) LIMITED

Head Office: PO Box 1, Dalton 3236

<table>
<thead>
<tr>
<th>Telephone</th>
<th>033 501 1600</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>033 501 1187</td>
</tr>
</tbody>
</table>

Chairman: CE Klipp;
Chief Executive Officer: RB Lütge;
Chief Marketing Officer: M van der Merwe;
General Manager Agri Services: FM Eggers;
General Manager Manufacturing: NC Napier;
General Manager Sawmilling & Subsidiaries: S Casey;
Chief Financial Officer: H Tredoux;
Production Manager: TK Kistan;
Engineering Manager: R Rajoo;
Human Resources Executive: A de Vries

UMFOLOZI SUGAR MILL (PTY) LIMITED

Umfolozi Mill
Private Bag X12, Mtubatuba 3935

<table>
<thead>
<tr>
<th>Telephone</th>
<th>035 550 7700</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>035 550 1145</td>
</tr>
</tbody>
</table>

Chairman: RG Tomlinson (Independent Non-executive Director);
Vice-Chairman: PD van Rooyen (Non-executive Director);
Chief Executive Officer: AT Wynne (Executive Director);
Operations Director: AB Williamson (Executive Director);
Chief Financial Officer & Company Secretary: G Brown;
Supply Chain Executive: GM Maritz;
Human Resources Officer: V Tembe
### Mill Group Boards

<table>
<thead>
<tr>
<th>Location</th>
<th>Contact Person</th>
<th>Address</th>
<th>Telephone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Darnall</strong></td>
<td>Ken Mc Quade</td>
<td>PO Box 54, Darnall 4480</td>
<td>032 439 2010</td>
<td><a href="mailto:Darnall.MillGroupBoard@tongaat.com">Darnall.MillGroupBoard@tongaat.com</a></td>
</tr>
<tr>
<td><strong>Eston</strong></td>
<td>J Gurney</td>
<td>PO Box 112, Eston 3740</td>
<td>031 781 2000/1</td>
<td><a href="mailto:mgb@estonclub.co.za">mgb@estonclub.co.za</a></td>
</tr>
<tr>
<td><strong>Felixton</strong></td>
<td>N Kok</td>
<td>PO Box 1338, Empangeni 3880</td>
<td>035 772 3110</td>
<td><a href="mailto:admin@fca.org.za">admin@fca.org.za</a></td>
</tr>
<tr>
<td><strong>Gledhow</strong></td>
<td>S Sathdeo</td>
<td>PO Box 55, Kwa-Dukuza 4450</td>
<td>032 437 4515</td>
<td><a href="mailto:ssathdeo@gledhow.co.za">ssathdeo@gledhow.co.za</a></td>
</tr>
<tr>
<td><strong>Noodsberg</strong></td>
<td>G Diack</td>
<td>PO Box 487, Wartburg 3233</td>
<td>033 503 1818</td>
<td><a href="mailto:gail@nbgrowers.co.za">gail@nbgrowers.co.za</a></td>
</tr>
<tr>
<td><strong>Komati</strong></td>
<td>C Robertson</td>
<td>PO Box 98, Komatipoort 1340</td>
<td>013 723 4305</td>
<td><a href="mailto:robertsonc@tsb.co.za">robertsonc@tsb.co.za</a></td>
</tr>
<tr>
<td><strong>Maidstone</strong></td>
<td>U Hemraj</td>
<td>Maidstone Mill, PO Box 770, Umhlali 4390</td>
<td>032 944 2783</td>
<td><a href="mailto:usha.growercouncil@telkomsa.net">usha.growercouncil@telkomsa.net</a></td>
</tr>
<tr>
<td><strong>Malalane</strong></td>
<td>C Coetzee</td>
<td>PO Box 1379, Malelane 1320</td>
<td>013 790 1083</td>
<td><a href="mailto:coetzeec@tsb.co.za">coetzeec@tsb.co.za</a></td>
</tr>
<tr>
<td><strong>Pongola</strong></td>
<td>D Bosman</td>
<td>PO Box 200, Pongola 3170</td>
<td>034 413 1215</td>
<td><a href="mailto:bosmand@tsb.co.za">bosmand@tsb.co.za</a></td>
</tr>
<tr>
<td><strong>Sezela</strong></td>
<td>H Cooper</td>
<td>PO Box 224, Sezela 4215</td>
<td>039 975 2078</td>
<td><a href="mailto:hcooperscga@illovo.co.za">hcooperscga@illovo.co.za</a></td>
</tr>
<tr>
<td><strong>Umfolozi</strong></td>
<td>C Coetser</td>
<td>PO Box 179, Mtubatuba 3935</td>
<td>035 550 0237</td>
<td><a href="mailto:umfcane@wpd.co.za">umfcane@wpd.co.za</a></td>
</tr>
<tr>
<td><strong>Umzimkulu</strong></td>
<td>E Berry</td>
<td>PO Box 26639, Port Shepstone 4240</td>
<td>039 682 5121</td>
<td><a href="mailto:berrye@telkomsa.net">berrye@telkomsa.net</a></td>
</tr>
<tr>
<td><strong>UCL Company</strong></td>
<td>SP Love</td>
<td>UCL Company Ltd MGB, PO Box 1, Dalton 3236</td>
<td>033 501 1600</td>
<td><a href="mailto:loves@ucl.co.za">loves@ucl.co.za</a></td>
</tr>
<tr>
<td><strong>Amatikulu</strong></td>
<td>K Archibald</td>
<td>PO Box 413, Gingindlovu 3800</td>
<td>035 337 1349</td>
<td><a href="mailto:keith@millgroup.co.za">keith@millgroup.co.za</a></td>
</tr>
</tbody>
</table>
RESEARCH ORGANISATIONS

SUGAR MILLING RESEARCH INSTITUTE NPC
C/o University of KwaZulu-Natal, Howard College Campus, Durban 4041

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 273 1300</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>031 273 1302</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:smri@smri.org">smri@smri.org</a></td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.smri.org">www.smri.org</a></td>
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</table>

Chief Executive Officer: Dr J Dewar;
Analytical Quality & Method Development: SN Walford;
Corporate Services Manager: Vacant;
Industry Support Manager: GT Smith;
Innovation & Knowledge Manager: AGJ Sachs;
Research & Development Manager: SB Davis

SOUTH AFRICAN SUGAR TECHNOLOGISTS’ ASSOCIATION
C/o SA Sugarcane Research Institute, Private Bag X02, Mount Edgecombe 4300

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 508 7543</th>
</tr>
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<tbody>
<tr>
<td>Fax</td>
<td>031 508 7420</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:sasta@sugar.org.za">sasta@sugar.org.za</a></td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.sasta.co.za">www.sasta.co.za</a></td>
</tr>
</tbody>
</table>

President: GT Smith; Vice-President: KA Redshaw;
Administrator: D Macdonald

SOUTH AFRICAN SUGAR INDUSTRY AGRONOMISTS’ ASSOCIATION
SA Sugarcane Research Institute, Private Bag X02, Mount Edgecombe 4300

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 508 7403</th>
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<tbody>
<tr>
<td>Email</td>
<td><a href="mailto:agronassoc@sugar.org.za">agronassoc@sugar.org.za</a></td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.sasa.org.za/sasiaa">www.sasa.org.za/sasiaa</a></td>
</tr>
</tbody>
</table>

Chairman: R van Antwerpen

LABOUR ORGANISATIONS

SUGAR MANUFACTURING AND REFINING EMPLOYERS’ ASSOCIATION
Kwa-Shukela, 170 Flanders Drive, Mount Edgecombe, 4300
PO Box 1000, Mount Edgecombe 4300

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 508 7300</th>
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<tbody>
<tr>
<td>Fax</td>
<td>031 508 7310</td>
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<tr>
<td>Email</td>
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<td>Website</td>
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Secretaries: South African Sugar Millers’ Association NPC

NATIONAL BARGAINING COUNCIL FOR THE SUGAR MANUFACTURING AND REFINING INDUSTRY
PO Box 472, Mount Edgecombe 4300

<table>
<thead>
<tr>
<th>Telephone</th>
<th>031 508 7331/2</th>
</tr>
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<tbody>
<tr>
<td>Fax</td>
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Chairman: S Mdlalose;
Vice-Chairman: V Nene;
Secretary: Y Motala
HISTORICAL HIGHLIGHTS
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
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<tbody>
<tr>
<td>1848</td>
<td>Edmund Morewood plants the first sugarcane on the KwaZulu-Natal North Coast</td>
</tr>
<tr>
<td>1853</td>
<td>First shipment of KwaZulu-Natal sugar to the Cape</td>
</tr>
<tr>
<td>1861</td>
<td>Indentured workers from India arrive</td>
</tr>
<tr>
<td>1865</td>
<td>First black owned steam mill at American Board of Missions station at Amanzimtoti</td>
</tr>
<tr>
<td>1896</td>
<td>Locusts destroy 40% of sugarcane crop</td>
</tr>
<tr>
<td>1900</td>
<td>Sugar output reaches 16 000 tons per annum with 30 mills in operation and 2 600 hectares under sugarcane</td>
</tr>
<tr>
<td>1910</td>
<td>Natal Sugar Association formed</td>
</tr>
<tr>
<td>1916</td>
<td>Agricultural News and Sugar Planters Gazette launched (Sugar Journal)</td>
</tr>
<tr>
<td>1920</td>
<td>Natal Sugar Millers’ Association founded</td>
</tr>
<tr>
<td>1925</td>
<td>Experiment Station (SASEX) established</td>
</tr>
<tr>
<td>1927</td>
<td>South African Cane Growers’ Association formed</td>
</tr>
<tr>
<td>1936</td>
<td>Sugar Act promulgated and first Sugar Industry Agreement published</td>
</tr>
<tr>
<td>1937</td>
<td>South Africa becomes foundation member of the first International Sugar Agreement with quota of 209 000 tons</td>
</tr>
<tr>
<td>1939</td>
<td>Annual production reaches 475 000 tons with 23 factories operating and 145 000 hectares under cane</td>
</tr>
<tr>
<td>1945</td>
<td>Variety NCo310, with more than 40% more sucrose than other varieties, released by SASEX</td>
</tr>
<tr>
<td>1949</td>
<td>Sugar Milling Research Institute (SMRI) established</td>
</tr>
<tr>
<td>1950</td>
<td>First bulk shipment of 5 750 tons of raw sugar</td>
</tr>
<tr>
<td>1953</td>
<td>South Africa joins post-war International Sugar Agreement (ISA)</td>
</tr>
<tr>
<td>1954</td>
<td>SASEX Extension service begins</td>
</tr>
<tr>
<td>1955</td>
<td>Variety NCo376 released by SASEX, the dominant variety over the next 40 years</td>
</tr>
<tr>
<td>1961</td>
<td>South Africa leaves British Commonwealth but negotiates new bilateral agreement to supply Britain 150 000 tons annually</td>
</tr>
<tr>
<td>1962</td>
<td>New markets developed in Canada and Japan</td>
</tr>
<tr>
<td>1964</td>
<td>Bilateral agreement with Britain terminated and 165 000 tons Commonwealth Preference transferred to Swaziland with agreement on marketing</td>
</tr>
<tr>
<td>1965</td>
<td>Bulk Sugar Terminal erected with storage capacity of 180 000 tons</td>
</tr>
<tr>
<td>1968</td>
<td>First N variety of cane – bred and selected in Natal – released by SASEX</td>
</tr>
<tr>
<td>1970</td>
<td>Molasses mixing plant installed at Bulk Sugar Terminal</td>
</tr>
<tr>
<td>1973</td>
<td>SASA launches Small Growers’ Financial Aid Fund with grant of R5 million</td>
</tr>
<tr>
<td>1974</td>
<td>Industrial Training Centre opened at Mt Edgecombe</td>
</tr>
<tr>
<td>1975</td>
<td>Domestic consumption reaches one million tons</td>
</tr>
<tr>
<td>1978</td>
<td>Variety N12, suited to high altitude regions on a two-year cycle released by SASEX</td>
</tr>
<tr>
<td>1981</td>
<td>Bulk Sugar Facility established in Gauteng for domestic market</td>
</tr>
<tr>
<td>1983</td>
<td>Severe drought cuts production by 750 000 tons</td>
</tr>
<tr>
<td>1984</td>
<td>Price Stabilisation Fund borrowings reach R327 million</td>
</tr>
<tr>
<td></td>
<td>Cane transport scheme transfers cost responsibility to growers</td>
</tr>
<tr>
<td></td>
<td>Quarantine glasshouse moved from Botanic Gardens to Mt Edgecombe</td>
</tr>
<tr>
<td>1985</td>
<td>A and B pool systems introduced</td>
</tr>
<tr>
<td>1986</td>
<td>Record sugar production of 2,370 million tons</td>
</tr>
<tr>
<td>1987</td>
<td>Political sanctions lead to loss of Canadian and USA markets</td>
</tr>
<tr>
<td>1988</td>
<td>Small-scale grower production exceeds 1,5 million tons (worth R51m)</td>
</tr>
<tr>
<td>1989</td>
<td>R1 m project announced to expand industry production by 300 000 tons</td>
</tr>
</tbody>
</table>

**Historical Highlights**

- 1848: Edmund Morewood plants the first sugarcane on the KwaZulu-Natal North Coast.
- 1853: First shipment of KwaZulu-Natal sugar to the Cape.
- 1861: Indentured workers from India arrive.
- 1865: First black owned steam mill at American Board of Missions station at Amanzimtoti.
- 1896: Locusts destroy 40% of sugarcane crop.
- 1900: Sugar output reaches 16 000 tons per annum with 30 mills in operation and 2 600 hectares under sugarcane.
- 1910: Natal Sugar Association formed.
- 1920: Natal Sugar Millers’ Association founded.
- 1925: Experiment Station (SASEX) established.
- 1927: South African Cane Growers’ Association formed.
- 1936: Sugar Act promulgated and first Sugar Industry Agreement published.
- 1937: South Africa becomes foundation member of the first International Sugar Agreement with quota of 209 000 tons.
- 1939: Annual production reaches 475 000 tons with 23 factories operating and 145 000 hectares under cane.
- 1945: Variety NCo310, with more than 40% more sucrose than other varieties, released by SASEX.
- 1949: Sugar Milling Research Institute (SMRI) established.
- 1950: First bulk shipment of 5 750 tons of raw sugar.
- 1955: Variety NCo376 released by SASEX, the dominant variety over the next 40 years.
- 1961: South Africa leaves British Commonwealth but negotiates new bilateral agreement to supply Britain 150 000 tons annually.
- 1962: New markets developed in Canada and Japan.
- 1964: Bilateral agreement with Britain terminated and 165 000 tons Commonwealth Preference transferred to Swaziland with agreement on marketing.
- 1965: Bulk Sugar Terminal erected with storage capacity of 180 000 tons.
- 1968: First N variety of cane – bred and selected in Natal – released by SASEX.
- 1973: SASA launches Small Growers’ Financial Aid Fund with grant of R5 million.
- 1974: Industrial Training Centre opened at Mt Edgecombe.
- 1975: Domestic consumption reaches one million tons.
- 1978: Variety N12, suited to high altitude regions on a two-year cycle released by SASEX.
- 1981: Bulk Sugar Facility established in Gauteng for domestic market.
- 1983: Severe drought cuts production by 750 000 tons.
- 1985: A and B pool systems introduced.
- 1986: Record sugar production of 2,370 million tons.
- 1987: Political sanctions lead to loss of Canadian and USA markets.
- 1988: Small-scale grower production exceeds 1,5 million tons (worth R51m).
- 1989: R1 m project announced to expand industry production by 300 000 tons.
1990  Industry proceeds exceed R2 billion for one season
1991  USA quota restored at 2,3% equating to 26 000 tons per annum
1992  First year of four-year drought reduces production to 1,5m tons
     Small Grower Development Trust launched
1993  Drought in 1993/94 season reduces production to 1,171 million tons
     Variety N24 with excellent sucrose and yield under irrigation released by SASEX
     Transvaal Sugar Limited’s new mill near Komatipoort starts crushing
1994  Introduction of phased deregulation programme
     Sugar Industry Central Board disbanded
1995  Drought restricts production to 1,67m tons in 1995/96
     R12 million Siyakha programme launched by President Mandela
1996  Production increases to 2,2m tons
1997  Illovo Sugar Ltd consolidates its leading position in southern Africa with the acquisition of Lonrho’s sugar division for R1,62 billion.
1998  Pools system of sucrose payments ends
1999  Record crop in 1998/99 at 2,646 million tons of sugar
     SASA moves into its own building in Mount Edgecombe with Growers and Millers
2000  Crop for 1999/2000 sets record at 8,38 tons cane per ton sugar
2001  Record crop in 2000/2001 at 2,729 million tons of sugar
     Launch of Umthombo Agricultural Finance (formerly Financial Aid Fund)
2002  SA chairs the International Sugar Organisation (ISO) for the first time
     ISO Council held in Durban in May 2002
2003  Record crop of 2 763 000 tons of sugar
2004  Tongaat Hulett Sugar Ltd’s Entumeni Mill closes
     Industrial Training Centre (ITC) changes name to Shukela Training Centre (STC)
     Illovo Sugar Ltd sells Gledhow Mill to a black empowerment group
     South African Sugar Experiment Station (SASEX) changes name to South African Sugarcane Research Institute (SASRI)
     Inkezo Land Company established
2005  Illovo Sugar Ltd sells Umfolozi Mill to a black empowerment group – Umvoti Transport Ltd
     SASA purchases 25% share in Maputo Sugar Terminal
2006  Highest world sugar price in twenty-five years
     Opening of STAM Terminal in Maputo in which SASA is a shareholder
     Sugar Journal turns 90 years old and publishes commemorative edition
2007  The production for the 2006/07 season dips to the lowest level in 10 years with 2,226 million tons of sugar produced
2008  The Shukela Training Centre changes from a division of SASA to a wholly owned subsidiary of SASA now called Shukela Training Centre (Pty) Ltd.
     SASA appointed as the implementing agent for a KZN Government fertiliser project whereby R60 million of fertiliser is distributed to embattled KZN small scale growers
2009  The 2009/2010 season production drops further to a 15 year low of 2,178 million tons of sugar
     The world raw sugar market price reaches a 29 year high of 30.33 US c/lb
2010  Sugar production for 2010/11 season dropped to 1,909 million tons
     150th Year Commemoration of the arrival of Indian people in South Africa
2012  National Minister of Land Reform and Rural Development commends industry on its land reform and reaching the transfer of 21% of freehold land under sugarcane production to black growers
2013  The lack of an effective tariff for several years sees sugar imports reach record highs with projected figures of some 350 000 tons per annum, displacing South African sugar and threatening the sustainability of the industry