



SANSOR®



ANNUAL REPORT 2023-2024

CELEBRATING
35 YEARS

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1.

INTERNATIONAL REPRESENTATION



ISF Board of Directors: Lukeshni Chetty, SANSOR | Nick Goble, Pannar Seed

Vegetable Seed Expert Group:

David Malan, Klein Karoo Seed Production | Best practices for Vegetable seed production.

Forage and Turf Advisory Group:

Brian Lever, AGT Foods | Best practices for Forage and Turf seed production.

Value Chain Coordination Group:

Nick Goble, Pannar Seed | Enhancing the importance of seed in the value chain.

Environment and Social Responsibility Coordination Group:

Riaan Roselt, DLF Seeds | Fostering trust and dialogue among members, positioning the seed sector as a sustainability leader, and offering essential guidance to collectively address present and future environmental and social responsibility challenges.

Phytosanitary Coordination Group:

Isabella Bezuidenhout, SANSOR | To drive the development of science and risk based phytosanitary policies and standards to reduce phytosanitary regulatory burdens on the international movement of seed and promoting their consistent and effective adoption and implementation at national, regional, and global levels.

Market Access and Trade Coordination Group:

Lukeshni Chetty, SANSOR | To advocate for science-based policies within seed legislation to ensure the accessibility of quality seeds to all.

Systems Approach Expert Group:

Isabella Bezuidenhout, SANSOR | To encourage dialogue and achieve alignment among the public and the private seed sectors in establishing a systems approach for seed where seeds produced in a NPPO-approved supply chain can be imported and (re-)exported with a phytosanitary certificate without the specification of measures for individual pests.

Plant Breeding Innovation Coordination Group:

Magdeleen Cilliers, SANSOR | To promote and encourage science-based regulations for Plant Breeding Innovations globally.

Genetic Resources Coordination Group:

Magdeleen Cilliers, SANSOR | To accelerate the delivery of innovation and enable seed to remain a contributor to solutions that address farmer and consumer needs, through ensuring fair and efficient access to genetic resources for their conservation and sustainable use.

Intellectual Property Coordination Group:

Magdeleen Cilliers, SANSOR | To work collectively as seed industry to ensure efficient protection of IP rights for plant varieties to increase trade and investment.

Trade and Arbitration Coordinating Group:

Brian Lever, AGT Foods Africa | Working on aligning the ISF arbitration rules with those of ISTA.

Illegal Seed Practices:

Brian Lever, AGT Foods Africa | Survey on the magnitude of Illegal Seed Practices is in process and will be discussed at forthcoming meetings.



OECD Seed Schemes: Kobus van Huyssteen, SANSOR | The OECD Seed Schemes provide an international framework for the certification of seed. They aim to facilitate global trade by setting up standards for seed production ensuring seed varietal identity and purity.



International Seed Testing Association (ISTA): Kobus van Huyssteen, SANSOR | ISTA is involved in the development of internationally approved ISTA Rules for sampling and testing seed quality, laboratory accreditation and the promotion of seed science research and test development.



Board of Directors, Past President: Kulani Machaba, Corteva Agriscience
Special Interest Groups (Vegetables and Field Crops): Magdeleen Cilliers, SANSOR | Kobus van Huyssteen, SANSOR | Provide a platform for discussion and exchange of ideas on issues affecting seed trade as well as providing a ready network, within and outside Africa to support the development of seed trade.
Plant Breeding Innovation Group: Magdeleen Cilliers, SANSOR | To increase awareness on Plant Breeding Innovation/gene editing among AFSTA members and to advocate countries to adopt PBI regulations.

2. REPORT SANSOR CHAIRMAN

This year SANSOR is celebrating its 35th anniversary. We are privileged to have the opportunity to build on the foresight and successes of our predecessors, but it also leaves us with the huge responsibility of looking after the interests of the South African seed industry.

One of the corner stones of good administrative capability is a healthy financial status. It, therefore, gives me great pleasure to assure you of the good standing of the organisation's financial affairs. The financial investments we made over the years continue to perform well and are providing a stable and healthy base going forward. SANSOR will continue to wisely manage these investments as well as its budget and expenditure to ensure future availability of funds to achieve our strategic objectives for long-term sustainability.

The healthy state of SANSOR's financial affairs allowed us to deliver on our strategic goals, one of which was the investment in a property now hosting the organisation's headquarters. The new offices not only facilitate the day-to-day running of SANSOR and the growing staff in support of the members and indeed, the entire seed industry, but it also serves as a home away from home for our members.

Our membership is continuing to grow, and this is not only testament to the fact that SANSOR has been able to attract and serve more members, but also speak to the growth and vibrancy in the seed industry in the country. SANSOR's aim will remain to continuously invest in the future of the seed industry.

One of the critical highlights of the past year was the amendment of SANSOR's Memorandum of Incorporation (MOI) updating the structure of the SANSOR Board of Directors as well as committee



terms. These amendments will ensure more consistency and stability at SANSOR Board level and lay the foundation for continuous operational excellence.

From a member service point of view, we are continuously building on the successes of previous years and made great strides in strengthening our relations with other industry organisations. For a long time SANSOR was more focused internally, but during the past year we reached out to the broader industry looking for common ground and lending our voice to mutual challenges. We cannot operate in isolation and has to add value to the entire industry as a collective industry.

I will neglect my duties if I omit to acknowledge the improved service delivery our members have experienced during the course of the year from our colleagues at the National Department of



Agriculture, Land Reform and Rural Development (DALRRD). I would like to thank everyone involved in orchestrating these changes. Our aim is to work with Government to achieve a common goal – an excellent seed industry in South Africa that operates optimally. It is heart-warming to acknowledge that we have come a long way over the past years in achieving this goal.

In June 2023 SANSOR hosted the ISF World Seed Congress in Cape Town. During the event, as the South African seed industry we were able to share our expertise and successes with other global role players. For the first time in the congress history, more than 100 South African delegates were joined by colleagues from other African countries sharing our experiences with the rest of the world.

The congress was significant on various levels including the quality of the programme, participation of delegates and creating a platform for local and African seed companies to show what they have on offer. More and more the world is looking to Africa to help address global challenges and Africa responded well.

During the course of the year, the seed industry has also faced challenges which severely tested SANSOR and its members' resolve and capabilities.

The first of these, and also the one I consider to be the single most profound challenge, was the climatic conditions faced by the industry. The past seasons' drought conditions in the summer rainfall areas not only will have an effect on the grain yield, but it also had a huge impact on our member's ability to produce seed for the next season.

The shift in seasons and the severe climatic conditions also brought about a second challenge and that is the prevalence of pests and diseases that

may also affect the quality and movement of seed.

Related to this, regulations will continue to have an impact on seed movement and as industry we will have to position ourselves strategically so that we remain in the position to address the need and fulfil our obligations.

The threat of Illegal and fake seed is unfortunately something that must remain on our radars and that would need a concerted industry focus.

I look forward to the year ahead, because although I mentioned some challenges and threats, at the same time the seed industry is in a good position to address these. Climate change also offer opportunities to our industry to come with solutions by way of new and adapted cultivars and traits and continue to provide additional value to farmers, processors, and retailers alike.

I am deeply cognisant of the time and efforts that my fellow board members, committee members and the SANSOR staff is dedicating to the seed industry, and I would like to acknowledge these efforts which has been instrumental in delivering on our goals. My sincere appreciation to the staff for their support during the past financial year. I also extend my gratitude to my fellow board members who continue to provide steady guidance and oversight to our organisation.

We live in a wonderful country and my wish is that we continue to work together to serve our members and indeed, the entire agricultural industry.

Regards
Matome Ramokgopa
Chairman SANSOR Board of Directors



Dear Member,

The year began with us finding our footing in our new offices and hosting our first committee and standing committee meetings within weeks of moving in. Needless to say, the year that passed was one of the busiest and most successful for SANSOR and it required that my team and I had to be multi-talented. From picking out furniture and carpet colours, to designing welcome cards for ISF delegates or even playing travel guide to the delegates all the while working with attorneys to update our MOI and structure. We enjoyed every minute of the hustle and bustle.

The ISF World Seed Congress held in Cape Town in June 2023 was one of the most successful ISF congresses ever held. While South Africa did not get the turn out we expected (in terms of delegate numbers) it was nonetheless very vibrant and positive. The CTICC provided the perfect venue and the proximity to great hotels was appreciated by all delegates. ISF for the first time had over 100 South Africans and many other African delegates. I would also like to take this opportunity to thank the Department of Agriculture, Land Reform and Rural Development (DALRRD) for sending several delegates to the congress as well as their two Deputy Ministers, Honourable Minister Skwatsha and Honourable Minister Capa. Their presence and participation spoke volumes for South Africa's commitment to seed trade.

At the end of March 2023, SANSOR and certain members were approached by the competition commission for formal submissions to the fresh produce market inquiry on inputs. This was a tedious and costly process, but SANSOR complied with all the requirements and timelines. It is important to note that these inquiries are to ensure South



Africa maintains a competitive market environment. Although the inquiry is only scheduled to end in October 2024, we already learned that very little is known about the value and importance of seed in our daily lives.

In June 2023 the Presidency of South Africa hosted a cannabis Phakisa at Kievits Kroon in Pretoria. The Phakisa included over 100 stakeholders from all over South Africa and SANSOR had the opportunity to attend and participate with a presentation on seed certification. This was greatly welcomed by the participants. Since the Phakisa in November 2023 SANSOR co-hosted a webinar on the hemp seed

scheme with DALRRD, which was consequently published in the government gazette. Soon, when varieties are listed, SANSOR will be able to certify cannabis seed.

In May 2023 SANSOR hosted a virtual meeting with members to amend the Memorandum of Incorporation (MOI). One of the key amendments was to update the SANSOR committee terms and the structure of the SANSOR Board of Directors. The SANSOR Executive Management Committees (EMC) which are Field Crops, Veg and Ornamental and Forage and Turf, will now comprise of three terms per representative of which each term is three years. In total it will, therefore be nine years. With only the Chairperson of each EMC graduating to the Board of Directors. The newly adopted MOI now allows for three open seats of the board to be held by a nominee from any Full Member company. The re-structuring ensures that we will have more consistency and stability at SANSOR Board level while ensuring we have individuals with adequate board and management experience to serve on the SANSOR Board. It is important to note that despite the changes, the MOI will still disallow representation from connected or interconnected parties on the board of Directors.

In October and November 2023, DALRRD hosted two public consultations for the regulations of the Plant Improvement Act and the Plant Breeders' Rights Act. One in Pretoria in October 2023 and the other in Cape Town in November 2023. These regulations are for the new Acts that were signed by President Ramaphosa in 2018. SANSOR would like to thank all those members that attended the sessions and made inputs to ensure Plant Breeders' Rights provide adequate protection thus supporting

innovation. SANSOR vehemently opposes the sale and exchange of protected varieties by farmers.

Despite the many successes of the last year, the regulations of plant breeding innovation (or New Breeding techniques) remain a challenge, not just for the seed industry but the entire agricultural value chain. One could also include the medical fraternity, considering the recent developments in medical science using genome editing to cure life threatening illnesses. SANSOR's position remains the same and is in line with the global position i.e., products of gene-editing are dissimilar to GMOs. And therefore, should be regulated in a sui generis framework. With that said, we appreciate that this remains a complex discussion, and we welcome regulations that are appropriate for science and suitable for all sectors it may impact.

Last, but not least, I would like to thank my team for a sterling job and dedication to SANSOR and the Board of Directors for their continued support and outstanding leadership and commitment to SANSOR. There are still many challenges that await the seed industry in the years ahead and my team and I remain at your service to charter the way forward.

I wish you a great and fruitful 35th Congress!

Lukeshni



A new name, a new focus, and a new trajectory for the SANSOR Field Crops Division (previously the Agronomy Committee).

In the past reporting period, this committee, under the chairmanship of Mr Nick Goble, homed in on the needs, concerns and long-term objectives of the SANSOR community belonging to this division. This was done through two committee meetings and a brainstorming session where members were given the opportunity to raise their concerns as an industry and to identify topics to be discussed which aligned with the mandate of the committee. These discussions ranged from policy and regulation challenges, industry challenges, and long-term strategies, like stakeholder identification and engagement.

A golden thread throughout all the discussions during the year was that we need a strong regulatory framework, a license to operate locally and internationally, reassurance that our intellectual property and genetics can be protected, and, that a return on investment can be ensured.

To ensure investor confidence, advocacy and awareness programmes will have to give attention to “brown bagging” and infringements against the Plant Improvement Act. To

act strategically, data is needed on the volume of farm-saved seed compared to new seed sales, as well as the number and extent of illegal seed activities.

The relevance and importance of SACTA was stressed to form part of this reform. There is also a strong sentiment, however, that the sole responsibility cannot fall on SACTA and that industry needs to be more pro-active. “Seed conditioning” as we know it is unfortunately no longer being done on small-scale by farmers’ on own property but by big enterprises at commercial scale.

SANSOR members are encouraged to report any Plant Improvement Act and Plant Breeders’ Right Act transgressions to the Department and to SANSOR. The SANSOR Intellectual Property Expert Technical Group was requested to start an “Illegal Seed Practices Working Group”. The working group could play an essential role in developing surveys to gather information on transgressions and to develop position papers and guideline documents to be used for awareness campaigns by any stakeholder. This will ensure that there are no grey areas and different interpretations in terms of the Plant Breeders’ Rights Act Regulations which makes provision for farmers to retain seed, and plant on own holding.

During committee meetings the following matters, amongst others, were also discussed:

Maize cultivar evaluation trials for the 2023/2024 season

A total of 69 trials were planted, with 8 companies entering 66 cultivars. Some of the main developments in the trials, coordinated jointly by Grain SA and SANSOR, include that yellow and white maize entries were separated in the water table regions and that two trials were planted in the Eastern Cape. Two contractors were used. The KZN Department of Agriculture, Stellenbosch University as well as Fort Hare University also planted one trial each. The University of Stellenbosch is looking at mycotoxin levels on grain.

Wheat cultivar release testing

The South African Winter Cereal Industry Trust (SAWCIT) wants to make the voluntary levy that they are collecting, statutory. Should the levy be made statutory, farmers will pay two levies, one to SACTA and the other to SAWCIT. It will be important for all role players to communicate the purpose and goal of each levy, to ensure that a clear distinction can be made.

Field crops division seed sales statistics working group

Seed sale statistics is an essential marketing tool and to gain even more value from it, some improvements and updates will have to be made. Some improvements that will be looked at by the working group under leadership of Chris Volbrecht, will include the unit of measurement for maize (perhaps moving to 80 000 kernels). Also, as there is currently no definition for the “small-holder” category, and interpretations differ between companies, it is suggested that this category either be redefined or removed.

During the coming year, the SANSOR Secretariat and committee look forward to receiving more topics and challenges from members, increased participation and collaboration and achieving its goals. The committee continues to show its relevance and importance in serving as the reporting structure for common challenges experienced by seed industry competitors. We would like to extend a word of appreciation to our committee members who help to change words into action, through their continued commitment. While we have unique challenges in South Africa, we are also subjected to continental and global dynamics which means that more challenges are sure to arrive on our doorstep. Fortunately, the SANSOR Field Crops Executive Management Committee will be there to ensure that these challenges are faced head-on, to ensure that seed companies can continue to focus on what they are best at: providing and innovating the most important input of all, seed!



5. EXECUTIVE MANAGEMENT COMMITTEE REPORT VEGETABLE AND ORNAMENTAL

SANSOR's amendments to the Memorandum of Incorporation (MOI) were adopted during a member meeting on 25 May 2023. One of the amendments included the name changes of the various committees. In future the Horticulture Divisional committee will be known as the Vegetable and Ornamental Executive Management Committee, and the Vegetable Seed Forum Sub-Committee will be known as the Vegetable Seed Production Forum Sub-Committee.

On 15 August 2023, the committee held a virtual brainstorming session with the broader Vegetable and Ornamental membership to discuss the re-alignment of the committee's agenda with the newly amended objectives to be in line with the newly adopted MOI.

The issue of varietal purity and varietal identity of Texas Grano has been raised several times by the committee. Even though the variety already has a maintainer, there is a concern that it might have drifted off. The decision was taken to evaluate all lines to see how they compare and to determine the extent of the drift. Comparative trials of Texas Grano/ Texas Grano 502 PRR were planted in the main area of production, Oudtshoorn. A preliminary report was shared with the committee which indicate that none of the sources were found to differ significantly or were contaminated to such an extent that SANSOR recommends the withdrawal of these seed lots from the market. Some attention will however need to be given to the denomination under which the seed is marketed as it can only be marketed legally using the correct denomination as listed in the national variety list namely, Texas Grano 502 PRR. During the evaluation trial, there was no "pink root" observed to check for pink root resistance. Starke Ayres will test for Pink Root Resistance (PRR) in the bulbs. The final evaluation report will be made available as soon as the results become available.

In the light of the previous, committee members decided to keep the momentum of the varietal identity and purity trials going. The next comparative trial will be on carrots and the following varieties has been selected: Chantenay Karoo, Cape Market, Kuroda, and Nantes.

A major focus area that was identified, was the enhancement of trade awareness and cooperation with African Countries. On 21 February 2024, Catherine Langat, Technical Manager of the African Seed Trade Association (AFSTA) reported on the various issues hampering trade in and between African countries. We will continue to explore possibilities to join hands with AFTSA to increase trade into Africa. Enhancing awareness and cooperation between SANSOR and the Department of Agriculture, Land Reform and Rural Development (DALRRD) is essential if we are to maximise our international trade opportunities and ensure that South African farmers benefit from access to high quality seed. Although there was some encouraging progress made regarding service delivery problems, DUS testing still remains a challenge.

The annual Vegetable Seed Production Forum Sub-Committee meeting was held on 1 February 2024 in Oudtshoorn, with 30 attendees representing eight seed companies attending. Members decided to put all topics regarding bee research on hold. The Memorandum of Understanding (MoU) that has been under discussion for a number of years, will now be taken off the agenda, as all seed companies involved has signed the document. The goal is to ensure that all signatories agree to certain basic principles such as isolation distances between crops, as well as dispute resolution procedures.

Sincere thanks to the Vegetable and Ornamental Executive Management Committee members, to the members of the sub-committee and to the Secretariat for their participation, valuable input, and tireless support during the past year.

6. EXECUTIVE MANAGEMENT COMMITTEE REPORT FORAGE AND TURF

The Forage Divisional Committee now called the Forage and Turf Executive Management Committee, after a Memorandum of Incorporation change approved at SANSOR's Annual Meeting of the Members in May 2023, strives towards promoting the objectives of SANSOR and working collectively to take the forage and turf industry into the future.

The committee held two formal meetings during the year, one in October 2023 in Jacobsdal and another in February 2024 in Pretoria. Once again, the committee ensured that one meeting included research feedback on forage-related matters. To this end, the committee visited the National Lucerne Trust trials in Jacobsdal in October.

Discussion points currently on the agenda include trade related and service delivery matters such as varietal listing challenges and market access. Currently pest information packages for the forage and turf industry is focusing on sorghum and mungbeans. The breeding and technology levy on lupins are still in place at R35 per ton, however, the collection on this end-point levy has not shown the returns as been experienced with other field crops.

A successful varietal purity trial was conducted on the cowpea cultivar, Glenda. All samples submitted showed the same off types and levels of occurrence and none of the sources showed any concerns in terms of varietal purity. The committee would like to thank all companies involved in making this a successful trial.

A continuous concern for the industry is varietal trials on forage crops. Trials are important for both industry and producers and ensuring functional forage trials continue in different regions in South Africa remains a concern. Action needs to be taken to ensure that trials are done correctly and that they can be used by the industry. The committee intends to take hands, where possible, with research institutes to ensure trials are of high standard and quality and that the results are valuable to the industry.

During the reporting period, a brainstorming session was held to determine what was needed to ensure the committee supports the forage industry going forward. Emphasis was placed on stakeholder relationships within the South African forage and turf industry. Improved stakeholder relationships and collaboration will be crucial to take the industry forward.



Ensuring that continued research to support the forage and turf industry in South Africa is conducted, was highlighted as another key priority as climate change and an increase in disease pressures are asserting extra pressure on the industry and producers.

Another concern that was raised pertains to the training of pasture scientists in the country and interventions on this matter will be discussed going forward to see where SANSOR can alleviate the pressure.

In addition, a risk analysis on service delivery and trade matters must be done to determine how SANSOR can support the industry in areas to overcome current hurdles. It is important to also consider what additional support is needed to grow the industry.

During the next financial year, a working group within the committee will focus on updating the forage statistic collection system to ensure that the data collected will support a growing forage industry. The turf division will also start collecting statistics under the Forage Division. The SANSOR secretariat would like to thank all the committee members for their dedication during the last reporting period and would especially wish to thank the outgoing chair of the committee, Mr Riaan Roselt, for his hard work and dedication over the years. We are looking forward to work under new leadership in the coming year and would like to encourage all forage and turf members of SANSOR to continue to collaborate and participate in the discussions to ensure the trade of quality forage seed can continue.

“Maintain the high regard and integrity of certified seed at all costs” has been the core mission statement of the certification department at SANSOR for almost 35 years.

The SANSOR Certification department consists of a small, yet versatile team, namely Kobus van Huyssteen (Technical Manager), Eddie Goldschagg (Specialist Advisor), Thabiso Ntsele (Certification Technician) and Felicia van Niekerk (Technical Administrator). The team assists members in ensuring that all statutory requirements pertaining to the Seed Certification Schemes are met every day and that SANSOR member companies are able to put out a premium product that distinguishes them from the rest, namely certified seed.

Through working closely with its members, the team has been crafting certification processes to stay ahead of the curve of international harmonisation rules, market trends and local industry developments.

Some achievements during the past year include: Cannabis Certification Scheme – SANSOR drafted and submitted a draft hemp seed certification scheme and gave presentations about the organisation and the scheme at a stakeholder meeting arranged by the government. From the onset, we stressed that we wanted to have a Cannabis Certification scheme that includes both dagga and hemp. The Draft Hemp Scheme was published for comments on 27 October 2023. Due to several developments at the department as well as at SAHPRA, an agreement was reached with the department that the draft Scheme would be amended to a Cannabis Certification Scheme. The amended Scheme was submitted to the department in early 2024 for approval and publishing. Discussions are still ongoing whether the Scheme will be voluntary or compulsory and when stakeholder consultations will take place.

SANSOR Certification Database - A significant effort was made to clean up, map and migrate existing seed certification data from two software platforms to the newly developed certification database. Some of these tables, like the certificate table, have over 72 000 entries. This historical data will be very valuable in determining long-term trends and analysis. The new database will be rolled out by the end of April 2024 and boasts several new features like offline capability, the use of Geo Mapping and easy navigation to linked records, amongst others.

SANSOR Certification workshops and training:

- A very successful refresher workshop for all inspectors authorised on soya beans and dry beans was held near Komatipoort on 13 and 14 June 2023 and 61 inspectors from 13 companies attended the workshop. Guest presenters spoke about diseases, good hygiene practices, new technology and refuge areas.
- A refresher workshop on grasses was also held in March 2024 at Modimolle. Mr Frits van Oudtshoorn from Africa Land-Use Training assisted in facilitating and presenting the workshop.
- The SANSOR Seed Certification course took place from the 21st to the 30th of August 2023 at the CSIR in Pretoria with 128 candidates who enrolled for the course from 37 seed companies and research institutes.

New developments:

PIA Regulations: Both public stakeholder consultation sessions were attended by a delegation from SANSOR. We were able to provide clarity and context on matters identified by the Registrar as being “unclear what industry wanted”. Written comments were submitted to the department on 17 November as per the Chief Director’s request. There will unfortunately not be an additional opportunity to see the Regulations before they are published. The Memorandum of Understanding (MoU) between SANSOR and the department providing the legal framework for SANSOR to carry out seed certification tasks was passed by their legal department however they will only present it to the Minister for signing once the new Plant Improvement Act and its Regulations are in force.

A new Registrar - Mrs Ashika Kistnasamy, former “Genebank Curator and Researcher at the ARC Plant Breeding (Vegetable & Ornamental Plants)”, was appointed as the new Registrar for Plant Improvement from 1 November 2023. We look forward to working closely with Ms Kistnasamy in future.

Challenges:

Communication - If I had to list one area that will require special attention, it would be communication and the flow of information between the certification department and its stakeholders. We often see that persons within a company who have been involved in a certification role for decades are retiring, or people vacate their positions, without really transferring the knowledge about SANSOR’s role and their involvement. We have therefore



dedicated more time to internal training sessions for companies where all persons involved can align, get clarity, and strategize.

Losing capacity within the team - Eddie has a wealth of knowledge and experience and is passionate about training and the seed industry. He has been instrumental in the department’s success and mentorship of staff over the years. We would like to wish him a happy retirement and express our appreciation for his contribution to seed

certification in general during his long and successful career.

Going forward:
 The Certification team will continue to assist members with certification and other matters, true to their commitment, to “Maintain the high regard and integrity of certified seed at all costs.”

EXPERT WORKING GROUP FEEDBACK

SEED CERTIFICATION EXPERT TECHNICAL GROUP FEEDBACK

After re-mandating itself and re-affirming its objectives, the committee resumed its responsibility to be the custodians of seed certification locally. This committee also provides a mandate to the SANSOR Certification department to act on any impending matters. Discussions during the past year included topics on the maintenance of public varieties, prioritisation of crop-specific refresher workshops, the testing of a new bulk bag seal (now being supplied by SANSOR) and training needs for inspectors/samplers. Some of the more pressing challenges the committee is faced with are post controls and the fact that so much more value can be gleaned when done thoroughly. Several representatives from this group also form part of the Certification Expert Working Group, tasked to review the Certification Scheme on an annual basis. Several amendments, including the updating of Latin names of diseases, were made to a draft Scheme that will be published in due course. Mr Whitey van Pletsen, who has close to 50 years’ experience in the seed industry has been a mentor for dozens and an integral part of this committee. We would like to express our gratitude for his contribution to the industry, his passion for training and forming young minds and his chairmanship of this Committee over the years.

SEED ANALYST EXPERT TECHNICAL GROUP FEEDBACK

The Technical Group unfortunately had to say goodbye to their chairperson, Ms Irma Scholtz, who emigrated to the Netherlands. Fortunately, Ms Sarah Shulze, the Vice-Chair, offered to take over this responsibility.

One of the objectives of the committee is to ensure continued training and development opportunities for seed analysts. The promotion of this career opportunity in general is also high on the priority list as there seems to be a shortage of seed analysts not only locally, but also worldwide. One of the highlights of the year certainly has to be the hosting of the 5th annual SANSOR Seed Analyst Seminar, which was presented online in October 2023. The presentations of the seminar focused on the following ISTA Chapters, Seed Health Testing, Thousand Seed Weight (TSW) Determination and Testing of Coated Seeds. We are seeing increased attendance at this online event, with participants from all over the world. The working group, with the help of SANSOR, will continue to ensure that seed analysts and lab personnel have sufficient training opportunities and that platforms are created for seed analysts to share experiences and best practices to ensure the high standard of seed testing in South Africa is maintained. We would also like to thank the Official Seed Testing Laboratory for being part of the Committee and for their valuable contribution to the committee.

CANNABIS/HEMP WORKING GROUP FEEDBACK

On 25 November 2023, we had our first SANSOR Cannabis/ Hemp Working Group Meeting. Glendon Ascough from Starke Ayres was appointed by SANSOR as the Chairman. Good discussions came from the WG, especially with regard to the fact that more focus should be placed on the off-take and end use to stimulate the market and ultimately seed sales.



The Phyto Department provides a platform for addressing national and international regulatory developments and seed health challenges that affect the international movement of seed, focusing on areas of industry importance.

While we have had several positive developments over the past year, no year is ever complete without its fair share of challenges and disappointments. One particular thorny issue was the Draft Annex on the development of a systems approach as a phytosanitary measure that was not approved by the International Plant Protection Convention (IPPC) for country consultation in 2022 and now again in 2023. Diverging views over what constitutes a systems approach and the concerns that the standards appeared to be written from an industry perspective is the basis for not moving forward. SANSOR will, however, continue to support the development of an alternative option in which seed movement will be possible in a certified supply chain, based on current industry pest management practices. This remains a very ambitious project but the rewards, will be great if this could be achieved.

The end of the year brought an unexpected challenge. For the first time in South Africa, on 21 December 2023, the Department of Agriculture, Land Reform and Rural Development (DALRRD) officially confirmed the detection of Pepper ringspot virus (PepRSV). The virus was positively identified from samples in a field of potatoes in the Limpopo Province in October 2022. Since April 2023, the virus was detected in four other provinces. PepRSV has so far only been reported in Brazil where it causes diseases on tomato, peppers, and artichoke. Surveys are conducted in production areas to determine the extent the virus spread, as well as the pest status in other parts of South Africa. Phytosanitary measures are implemented to restrict the movement of host material from infected to non-infected areas. Members are encouraged to report suspected detection of this pest to the DALRRD. Further research on the virus and its associated vector are still needed. SANSOR will continue to monitor the progress and update members on the status.

The training programme for Phytosanitary Certification still attracts considerable interest from the seed industry, with 17 authorised SANSOR seed inspectors having enrolled for the Theoretical Courses in 2023. The period under review saw the establishment of a Phytosanitary Certification Forum with the first meeting held on 15 February 2024. The Forum will provide a platform for the development of a more formal agreement between SANSOR and DALRRD.

Re-exports, an important business practice, is not facilitated by today's patchwork of import conditions that lacks harmonisation. Discrepancies within the interpretation of International Standards by governments is increasing the complexity of the additional declarations required for certification. During the fiscal year, significant progress was made. SANSOR had the opportunity to engage in discussions related to this topic during the ISF/SANSOR seminar after the 2023 WSC in Cape Town. The 72 delegates comprised South African government officials, SANSOR members and 16 international seed sector individuals. The goal of the event was to encourage dialogue between the attendees towards finding collaborative opportunities and a way forward in addressing current challenges with the implementation of standards for export. The productive and positive conversations with government escalated to a request to the IPPC for the amendment of the international export standard by the NPPO of New Zealand, with support by the NPPO of South Africa.

EXPERT WORKING GROUP FEEDBACK

PHYTOSANITARY EXPERT TECHNICAL GROUP FEEDBACK

During the past year the Phytosanitary Expert Technical Group (ETG) met twice, and both meetings were well attended.

A long-standing joint effort between the seed industry and DALRRD focused on addressing the restrictions on the export of maize seed to the USA. This proved to be a lengthy exercise, especially from a technical point of view. Almost 20 years after inception, it finally comes down to the publication of the proposed import measures for public comment by the USA. This is where the process morphs into a more political scenario. APHIS will not move forward until it is confident there is support by US stakeholders for granting market access to South Africa. SANSOR will persist to ensure that maize exports to USA become a reality.

Another successful initiative driven by this group was the proactive compilation of Pest Information Packages (PIPs) which form the basis of opening new export markets. Since the inception of the Pest List Project, 6 crop pest lists were developed. The reporting period welcomes the first drafted industry production practises for market access for mungbeans, popcorn maize, sunflower and tomatoes. The ETG continues its efforts to be proactive in opening new markets in the seed industry.

Good news from South Korea. Since 2017, an amended regulation allowed rye and oats seed to be tested for *Pseudomonas syringae* pv. *atropicans* (Psa) onshore using the Korean protocol. Countless technical efforts to provide scientific justification that seed is not a pathway for Psa, has finally paid off. Psa has been deregulated from the quarantine pest list and from 14 September 2023, rye and oats seed do not need a diagnostic test for it to be exported to South Korea.



As the calendar flips to a new year, I look forward to the continued success we have had so far and to another year of exciting and challenging activities. In the coming year, we would like to foster and expand on our relationship with the DALRRD. We hope to form a partnership with the ARC for various training opportunities with a specific focus on phytosanitary certification. Finally, and above all, we are looking forward to the online import permit system to “go live”.



KNOW THE DIFFERENCE:

PHYTOSANITARY VS SEED CERTIFICATION AUTHORISATION

SEED CERTIFICATION VERSUS PHYTOSANITARY CERTIFICATION

SEED CERTIFICATION

SANSOR

- National Designated Authority responsible for seed certification.
- Authorise inspectors to conduct seed certification activities.

QUALITY CONTROL SYSTEM

Ensures genetic identity and purity of plant varieties.

FIELD INSPECTIONS

This is a step in the certification process to ensure that there are no aspects that will negatively influence the genetic purity of the seed being produced.

PHYTOSANITARY CERTIFICATION

DALRRD

- Sole authority responsible for phytosanitary certification.
- Authorise SANSOR seed inspectors to perform phytosanitary field inspections.

PLANT HEALTH REGULATORY SYSTEM

Ensures compliance with phytosanitary import requirements.

FIELD INSPECTIONS

A field inspection is done to ensure that the seed crop in the field is certified free of signs of pests and diseases as required by the importing country.

VS

PROCEDURE FOR AUTHORISATION

PRE-REQUISITE

Post-school agricultural education OR at least five years applicable experience in the seed industry.

REQUIREMENTS

- Successfully completed Module 1 - 3 of the SANSOR theoretical training course.
- Undergo practical training with an authorised SANSOR mentor for at least one completed crop cycle.
- Pass the prescribed practical evaluation.
- Application for authorisation to be submitted within 5 years of completing the theoretical course.

SANSOR AUTHORISED INSPECTOR

- An authorisation letter and card with a unique number will be issued by SANSOR as proof of authorisation.
- Authorisation is linked to seed company.
- Authorisation is limited to the specific crops on which the inspector has been evaluated on.

REQUIREMENTS TO ADD ADDITIONAL CROPS TO AUTHORISATION

- Must undergo practical training for the specific crop with an authorised SANSOR mentor for at least one completed crop cycle.
- Pass the prescribed practical evaluation.
- Application for the addition of a new crop can be submitted at any time.

CONDITIONS FOR MAINTAINING AUTHORISATION

- Inspectors must do regular inspections on all crops authorised for.
- Regularly participate in refresher/ training workshops.
- Remain informed on the Seed Certification Scheme and relevant amendments.
- Undergo monitoring by SANSOR and DALRRD when instructed.
- Attend refresher workshops and be re-evaluated every 3-5 years.

AUTHORISATION WILL LAPSE IF:

- You are no longer in the service of the company under which you were authorised.
- The company under which you are authorised is no longer a member of SANSOR.
- No active field inspections have been conducted for more than 5 years.

PROCEDURE FOR AUTHORISATION

PRE-REQUISITE

Must be an already authorised SANSOR seed certification inspector.

REQUIREMENTS

- Successfully completed the DALRRD Phyto theoretical course.
- Undergo practical training with an authorised SANSOR phytosanitary mentor for at least one completed crop cycle.
- Successfully complete a prescribed practical assignment.
- Practical assignment must be submitted within 18 months of completing the theoretical course.

DALRRD AUTHORISED INSPECTOR

- Authorisation letter issued by DALRRD as proof of authorization.
- Same authorisation number as for seed certification
- Authorisation is linked to seed company.
- Authorisation is linked to the specific crops on which inspector is authorised on for seed certification.

REQUIREMENTS TO ADD ADDITIONAL CROPS TO AUTHORISATION

- Obtain authorisation for the additional crop with the seed certification department first.
- Undergo practical training by an authorised SANSOR, phytosanitary mentor for at least one completed crop cycle.
- Successfully complete the prescribed practical assignment.
- Practical assignment must be submitted within 18 months of application.

CONDITIONS FOR MAINTAINING AUTHORISATION

- Inspectors must do regular inspections on all crops authorised for.
- Regularly participate in refresher/ training workshops.
- Remain up to date on pests affecting the specific crop and relevant phytosanitary requirements of importing countries.
- Audited by DALRRD during field inspections.
- Undergo re-evaluation every 3-5 years

AUTHORISATION WILL LAPSE IF:

- You are no longer in the service of the company under which you were authorised.
- The company under which you are authorised is no longer a member of SANSOR.
- No active field inspections on crops have been conducted for more than 2 growing seasons.

10. DEPARTMENTAL REPORT POLICY AND RESEARCH DEPARTMENT

Science and policy work hand in hand, the one cannot work without the other. Science is needed to create science-based policies, however, certain policies must also be in place to ensure and enable science and innovation.

The Policy and Research is managed by Magdeleen Cilliers and she is supported by Lomile Khoete the Policy and Research Graduate.

Policy

Science-based policies are needed to ensure innovation can prosper and to facilitate continuous harmonised seed trade. During the last financial year, the policy department at SANSOR ensured the representation and active participation of the seed industry in various policy discussions.

The promotion and protection of Intellectual Property Rights remains an important topic for the seed industry. SANSOR has a designated Intellectual Property Committee with various actions that promote the protection of intellectual property. During the last financial year, SANSOR and various of its members attended the DALRRD consultative workshops on the regulations of the Plant Breeders' Rights Act of 2018. The topics discussed included farmers' privilege, seed exchange and the quantities of seed that are allowed to be exchanged. We wish to thank all the members who supported SANSOR in attending these important meetings.

At UPOV level it was also important to be aware of the various discussions that can affect South African policies such as discussions on Harvested Material and Private and Unauthorized Use and Provisional Protection. UPOV also published its new Explanatory notes on Essentially Derived Varieties. SANSOR has developed a DUS database to monitor all applications in the system for either varietal listing or Plant Breeders' Rights. We envision that this can support DALRRD to ensure that applications are handled as quickly as possible.

Another important topic on our agenda was Plant Breeding Innovation through new breeding techniques. In light of the Minister of Agriculture's decision to not uphold the appeal board findings following the industry appeal led by Agbiz on the decision to classify all products made with new breeding techniques as Genetically Modified Organisms (GMOs), SANSOR will continue to work on this matter. SANSOR believes this decision will hamper trade and also put South Africa on the back foot for seed production and the release of improved varieties that

focus on increased crop production in a challenging environment facing climate change.

Although South Africa is a genetically resource-rich country, most of the crops and vegetables consumed are not indigenous to South Africa. Various discussions are taking place internationally to prevent the global exploitation of genetic resources. International bodies such as the Convention on Biological Diversity and the International Treaty of Plant Genetic Resources for Food and Agriculture (ITPGRFA) are important instruments to ensure enough available genetic resources for the breeding and improvement of varieties. Aspects that were monitored include the regulation of digital sequencing information, synthetic biology, multilateral system of the treaty.

Research

SANSOR's research team is continuously scouting the seed industry research space to analyse the type of research taking place in the country and contribute where possible. The team wishes to identify research gaps and ensure the prioritization of important research. SANSOR also sits on two research panels within the Maize Steering Committee to evaluate research proposed to Maize Trust.

SANSOR has been involved in the National Maize Cultivar Evaluation Trials (NMCET) for the past four years. The primary objective of the NMCET is to objectively compare the performance of new as well as existing cultivars in the South African market. The 2023/24 season has commenced with 66 cultivars nominated from eight seed companies.

SANSOR promotes continued research and development in agriculture, especially collaborations between seed companies and academic institutions. The research team has created a guidance document for seed companies when seed is requested by research institutions for research purposes. Seed companies need to have mutually agreed contracts with the research institutes they collaborate with to ensure that their intellectual property rights are always protected.

Over the past few years, the milling index of maize has been discussed extensively in the Maize Forum Steering Committee, especially when significant fluctuations are observed among seasons. To gain a better understanding of these fluctuations, the seed industry together with SANSOR has initiated a project to assist in investigating the factors affecting the milling index of maize.

EXPERT WORKING GROUP FEEDBACK

INTELLECTUAL PROPERTY (IP) EXPERT TECHNICAL GROUP FEEDBACK

During the SANSOR Intellectual Property Expert Working Group meetings, various actions were carried out in preparation for the DALRRD Consultative meetings on the Plant Breeders' Rights and Plant Improvement Act Regulations that took place in October and November. During the financial year, the committee prepared an industry view on farmer category sizes and worked on a PBR Disclaimer for seed bag labelling. The committee met with the British Plant Breeders Association to discuss their system on how they approach conditioning for the purpose of propagation on farm-saved seed.

As part of capacity development, an Intellectual Property Webinar was hosted that was attended by 112 people, as well as a webinar on the IPR Act, which focuses on intellectual property emanating from publicly financed research. The committee is also in the final stages of creating a short online course about IP. In the next financial year, we are looking forward to developing an opinion piece on Digital Sequencing Information and the Multilateral System for the International Treaty of Plant Genetic Resources for Food and Agriculture (ITPGRFA) as well as providing members with a guidance document on how to prevent seed IP infringements.

BIOTECHNOLOGY AND INNOVATION EXPERT TECHNICAL GROUP FEEDBACK

Continued plant breeding and the use of innovation in plant breeding are of utmost importance to take the seed industry forward. During the financial year, the Minister of Agriculture decided to not uphold the decision of the appeal board finding after the industry appeal led by Agbiz on the Executive councils' decision to classify all products made with new breeding techniques as Genetically Modified Organisms (GMOs). SANSOR and the Biotechnology and Innovation Experts continue to advocate for science-based regulations for Plant Breeding Innovations made with new breeding techniques.

During our committee meetings, we are also assessing the possible risk small-scale farmers pose to stewardship guidelines of genetically modified traits. Other topical discussions underway in the committee include seed production hurdles containing stacked traits, digital sequencing information and low-level presence of GMO traits in seeds for importation. The committee is also in the process of working on a short online course for biotechnology and innovation.

CAPACITY AND PROMOTION EXPERT TECHNICAL GROUP FEEDBACK

SANSOR is passionate about building capacity for the seed industry and consequently has been running a bursary programme funding agricultural postgraduate students who focus on seed industry-related research. In the past year, SANSOR funded seven students (five MSc and two PhD) across four South African Universities. SANSOR continuously participates in school and university visits to promote the agricultural sector with a specific focus on careers in the seed industry.

In the past year, SANSOR hosted three online Lunch and Learn Webinars which included topics relating to plant breeding, crop protection, food security and careers in the seed industry.

In 2023 the International Seed Federation World Seed Congress was held in South Africa and SANSOR enabled eight postgraduate students to attend the congress. This exposed the students to the global seed industry value chain. For the 2024 SANSOR Annual Congress, SANSOR wishes to invite academics to the congress to allow SANSOR members to connect with them and establish meaningful relationships which can be of benefit to seed companies and the industry at large.





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