



S A N S O R[®]

ANNUAL REPORT

2025 | 2026





Table of Contents

| | |
|--------------------------------------------------------------|-----------|
| 1. Chairman's Message | 3 |
| 2. From the desk of the General Manager | 4 |
| 3. Executive Management Committee (EMC) | |
| Field Crops | 6 |
| Vegetable and Ornamental | 8 |
| Forage and Turf | 10 |
| 4. Expert Technical Groups (ETG) Updates | 12 |
| 5. SANSOR International & National Representation | 15 |
| 6. SANSOR Chairs | 17 |



Chairman's Message



It is both an honour and a privilege to present this Chairman's Report, which also marks the conclusion of my tenure as Chair of the SANSOR Board. Having served on the Board for five years, four of which as Chairman, this report is offered as a reflection on a period of transition, consolidation, and deliberate positioning for the future of the organisation.

This reflects the work and intent of a Board of industry colleagues, peers and competitors acting collectively in the interests of the organisation and the broader industry it represents.

One of the consistent priorities has been to position SANSOR for **sustained relevance, broader authority, and long term credibility**. This focus recognised that the role of industry bodies is evolving, and that relevance can no longer be assumed—it must be earned through governance, engagement, and contribution beyond the confines of the immediate sector. This approach requires us to look beyond annual reporting cycles and instead focus on the institutional strength of SANSOR: ensuring that its structures, governance framework, and strategic posture are aligned to a changing agricultural and regulatory environment.

A tangible symbol of this long term thinking has been the move into SANSOR's own offices. While initiated under the leadership of Riaan Roselt, the Board remained committed to seeing this process through. The decision was guided less by symbolism than by practicality—providing the organisation with a permanent home that supports professional operations, member engagement, and meaningful external interaction. It represents an investment in stability and institutional maturity that will serve the organisation for many years to come. In parallel, we paid careful attention to governance and organisational structure. Amendments to the Memorandum of Incorporation, alongside internal restructuring and clearer alignment between the Board and the Secretariat, were undertaken to future proof the organisation. These steps were necessary to ensure that SANSOR remains credible, compliant, and capable of responding to an increasingly complex operating environment.

While seed remains central to SANSOR's mandate, we should increasingly recognise that the organisation operates within a broader agricultural system. Over this period, SANSOR has positioned itself more deliberately within national agricultural discourse, strengthening relationships with stakeholders across the value chain and contributing constructively to conversations on sustainability, food security, and sector development. This shift has been supported by a more intentional advocacy approach and enhanced communication capability, enabling SANSOR to articulate industry perspectives with clarity and confidence. As an industry, telling our own story has become imperative in an environment where influence, perception, and policy are closely linked.

Operationally, the Board remained committed to strengthening the systems that underpin trust and credibility. The rollout of the new seed certification database is one such example. While technical in nature, it is foundational to maintaining integrity within the seed system, supporting members, and safeguarding confidence in certification processes. These investments are essential to the long term health of the industry.

SANSOR has also continued to play an active role beyond South Africa's borders. Engagement with international and continental platforms, including hosting key industry events like ISF, AFSTA and contributing to leadership within African seed structures, reaffirmed the importance of collaboration, shared learning, and collective leadership. These engagements reinforced South Africa's standing within the global seed community and underscored SANSOR's responsibility beyond its immediate membership.

Progress during this period reflects a strong and constructive working relationship between the Board and management. This partnership is grounded in shared intent, mutual accountability, and a focus on what is best for the organisation. I would also like to in particular acknowledge Lukeshni and her team to whom we owe immense gratitude for their professionalism, resilience, and commitment to the seed sector.

As Marcus Aurelius observed: *"If you are distressed by anything external, the pain is not due to the thing itself, but to your estimate of it; and this you have the power to revoke at any moment."*

This perspective has often guided the approach—choosing to focus not on challenges themselves, but on thoughtful and measured responses to them.

The mandate of the incoming Board is to build on these foundations: to further strengthen SANSOR's position within the broader agricultural ecosystem and to contribute meaningfully to shaping the future of South African agriculture. The industry is also facing risks and pressure because of geopolitical tensions, the P in PESTEL analysis has never been this relevant as today. Here at home, the prevalence of brown bagging and IP infringements also poses a threat to the industry. Influence matters, and as the saying goes, if you are not at the dinner table, you are on the menu. SANSOR must continue to earn its seat through credibility, collaboration, and consistent engagement.

As I step down, I do so with sincere gratitude: to the industry for the confidence placed in this Board, to my fellow Board members for their commitment and collegiality, and to previous Chairs whose stewardship laid the groundwork for the progress achieved during this period.

My hope is that I leave SANSOR in a stronger position than I found it—better prepared for the future, more assured of its role, and well positioned to continue serving the industry with credibility and purpose.



From the desk of the

General Manager

The 2025/26 financial year has been a period of strong performance, strategic progress, and growing influence for SANSOR. From the outset, the organisation demonstrated its leadership role within the African seed sector by accepting the AFSTA flag in Kigali, Rwanda, confirming South Africa as host of the 2026 congress. This milestone not only reflects industry confidence in SANSOR's capabilities but also positions the organisation at the centre of continental dialogue on seed trade, innovation, and policy.

Building on this mandate, the SANSOR team delivered a successful African seed trade event through focused planning, effective stakeholder coordination, and the mobilisation of sponsorship support. The event served as a platform for knowledge exchange, partnership development, and industry alignment, reinforcing SANSOR's role as a trusted convener and facilitator of growth within the sector.

A key initiative during the year was the development and implementation of a bespoke seed industry remuneration survey, undertaken in partnership with Mercer and supported by the Capacity and Promotion Expert Technical Group. With participation from over 20 seed companies, the survey established a valuable baseline for benchmarking remuneration practices across the industry. Importantly, the process also surfaced critical insights regarding data collection challenges and report usability. These lessons are already informing improvements to the survey design and reporting framework, ensuring that future iterations will deliver greater accuracy, accessibility, and strategic value to members.

Strategic alignment was further strengthened through a dedicated three-day communication strategy workshop held in April 2025, bringing together SANSOR team members and Board representatives.

This engagement resulted in the identification of three priority advocacy pillars that now guide the organisation's external engagement and messaging:

- Intellectual Property
- Innovation
- Combating illegal seed practices, including brown bagging

These focus areas are not only central to the sustainability of the seed industry but also critical to protecting investment in research and development. In particular, the growing prevalence of brown bagging and the misuse of farm-

From the outset, the organisation demonstrated its leadership role within the African seed sector by accepting the AFSTA flag in Kigali, Rwanda, confirming South Africa as host of the 2026 congress.

saved seed were identified as significant threats to innovation, market integrity, and fair competition. As a result, SANSOR has committed to intensifying its efforts to raise awareness, strengthen industry compliance, and support enforcement initiatives in this area.

The publication of the Plant Breeders' Rights (PBR) regulations in 2025 marked a pivotal moment for the industry, providing a clearer regulatory framework to safeguard intellectual property and encourage innovation. SANSOR has taken a proactive leadership role in interpreting and communicating the implications of these regulations to a wide range of stakeholders, including farmers, processors, conditioners, and members. This work is essential to ensuring that the benefits of the regulatory framework are fully realised, while also addressing areas of uncertainty and potential non-compliance.

To deepen this effort, SANSOR engaged IP attorney Mr At van Rooy to provide specialist legal insight and support to members. His contributions across Expert Technical Group meetings and member engagements have significantly enhanced understanding of complex intellectual property issues. In addition, his ongoing work to develop formal legal opinions for both Field Crop and Forage companies, as well as Vegetable and Ornamental seed companies, will provide critical clarity and guidance for the industry. A consistent outcome from these engagements has been the clear need for sustained, practical, and accessible communication on Plant Breeders' Rights, which remains a strategic priority for SANSOR moving forward.

Recognising that effective communication is central to achieving its advocacy objectives, SANSOR strengthened its internal capacity with the appointment of a Communications and Marketing Officer, Mrs Elray de Klerk, in September 2025. With over a decade of experience in agricultural communications, she brings valuable expertise to drive targeted messaging, stakeholder engagement, and industry visibility. Additional appointments in certification and financial administration have further enhanced the organisation's operational efficiency, enabling more responsive and effective service delivery to members.

SANSOR also continued to innovate in its approach to member engagement through the implementation of its revised congress model. The successful hosting of a one-day congress in Pretoria demonstrated the value of a more accessible and cost-effective format,

resulting in strong attendance and high levels of participation. This flexible approach allows SANSOR to adapt to the evolving needs of its members while maintaining the quality and relevance of its engagements. In 2026, the organisation will host a virtual event in light of the AFSTA congress, before returning to a two-day format in 2027.

Overall, the organisation's financial position remains stable, providing a solid foundation for continued investment in strategic initiatives and member services. Following a period of organisational transition in 2024, SANSOR is now well capacitated, with a strengthened team and improved operational systems. This stability reflects the effectiveness of its governance structures and the commitment of its leadership to maintaining accountability, transparency, and long-term sustainability.

The achievements of the past year reflect a combination of strategic clarity, operational execution, and strong leadership. SANSOR has not only delivered on its core mandate but has also positioned itself as a proactive and influential voice within the seed industry, both locally and across the African continent.

This progress has been made possible through the active involvement and guidance of the Board and Chairperson, whose leadership continues to shape the organisation's direction and impact. Their commitment to addressing key industry challenges and supporting innovation has been instrumental in driving SANSOR's success.

As the organisation looks ahead, it does so with clear priorities, strengthened capacity, and a renewed focus on delivering value to its members.

Sincere appreciation is extended to the outgoing Chairman for his dedication, leadership, and unwavering commitment to advancing SANSOR's role and impact within the seed industry.



Field Crops

Overview and Key Highlights

The 2025/26 season marked a year of consolidation, recovery, and strategic repositioning for South Africa's agronomic crop seed sector. Following several seasons of climatic volatility and subdued farmer confidence, conditions during the summer 2024/25 improved materially across most production regions. Higher and more evenly distributed rainfall supported a recovery in maize, soybean and sunflower production, while winter crops experienced mixed outcomes owing to delayed planting and region specific moisture constraints.

Against this backdrop, SANSOR's field crops activities **focused on four core priorities: safeguarding market access, strengthening regulatory engagement, supporting innovation and cultivar testing, and addressing the growing risks posed by illegal seed practices.** Meaningful progress was achieved across each of these areas, although several structural and external challenges remain that will require sustained industry collaboration going forward.

Key highlights during the year included *progress* toward opening maize seed exports to the United States, continued delivery and refinement of cultivar evaluation trials, intensified engagement on plant breeding innovation and gene editing, and the implementation phase of the revised Plant Breeders' Rights (PBR) regulatory framework.

Stakeholder Engagements and Industry Representation

Regular and constructive engagement with regulators and value chain partners remained central to SANSOR's work over the past year.

International engagement featured prominently, particularly in relation to trade and regulatory alignment. Significant effort was invested in technical engagements with NPPOZA and the United States Animal and Plant Health Inspection Service (APHIS) to advance maize seed export access. In addition, SANSOR maintained active participation in OECD Seed Schemes.

Industry wide collaboration was strengthened through ongoing work with Grain SA, CropLife SA, SACTA and SAPBA. These engagements enabled alignment on issues ranging from cultivar performance testing and levy structures to innovation policy and illegal seed practices.



Focus Areas and Outcomes During the Year

Trade and Market Access

One of the most strategically important focus areas during the year was maize seed export access to the United States. Following intensive engagement, APHIS accepted most of the phytosanitary comments submitted by NPPOZA, representing a significant step forward. Two technical requirements remain outstanding, namely diagnostic protocols for *Striga asiatica* and *Fusarium nelsonii*. These matters are now firmly defined, and the focus has shifted to protocol development and laboratory accreditation. While work remains, the process advanced compared to previous years.

Cultivar Evaluation and Data Integrity

The Maize Cultivar Evaluation Trials (MCET) were successfully planted and evaluated across multiple regions. Lessons from recent challenging seasons prompted a renewed focus on trial robustness, data quality and communication. During the year, protocol reviews were initiated, statistical capacity constraints were openly addressed, and discussions commenced on improving digital accessibility of trial results. These steps are aimed at ensuring that cultivar data remains credible, relevant and farmer focused in an increasingly data driven environment.

Plant Breeding Innovation

Global advances in gene editing and new breeding techniques placed plant breeding innovation firmly on the Field Crops agenda. While South Africa continues to regulate such technologies under existing GMO frameworks, developments in jurisdictions such as the European Union and New Zealand underscored the need for adaptive, science based regulatory approaches. The Field Crops committee continues to discuss and advocate the multi support approach to a better policy outcome going forward.

Intellectual Property and Compliance

The implementation of new PBR regulations represented a major policy milestone during the reporting period. However, meetings and industry discussions made it clear that regulatory reform alone will not resolve long standing challenges around illegal seed practices, brown bagging and farm saved seed. These issues remain particularly acute in soybean and cotton, with evidence of material revenue leakage and erosion of breeding incentives. During the year, SANSOR engaged legal experts, members and SACTA to explore practical compliance mechanisms, improved farmer communication, and options for consistent enforcement across the industry.

Key Concerns and Industry Challenges

Despite improved production conditions, several risks and challenges warrant continued attention from members.

The industry also continued to monitor emerging pests and diseases, including *Goss's wilt* and *Pepper ringspot virus*, highlighting the need for vigilance, surveillance and coordinated response mechanisms.

Trade barriers and regulatory complexity remain significant concerns. Export access is increasingly shaped by biosecurity requirements, low level presence policies and divergent international regulatory approaches to breeding technologies. At the same time, domestic regulatory capacity constraints, including delays in variety listing, premises registration and chemical approvals, continue to impose costs on seed companies.

Internationally, developments in gene editing regulation, sustainability standards and digital certification systems will increasingly influence South African seed trade and competitiveness. Staying aligned with these trends while protecting domestic interests will be critical.

Focus Areas for 2026/27

Looking ahead, SANSOR's Field Crops focus for 2026/27 will remain firmly anchored on strengthening industry resilience and competitiveness.

Key priorities include:

- Concluding technical work on maize seed export access and safeguarding existing and future trade markets
- Deepening engagement on plant breeding innovation and regulatory reform
- Strengthening cultivar evaluation systems, statistical capacity and digital data access
- Implementing practical, consistent approaches to PBR enforcement and illegal seed practices
- Engaging SACTA and GSA on mechanisms to ensure sustainability of the SACTA Breeding And Technology Levy
- Enhancing disease awareness, surveillance and phytosanitary preparedness

The year ahead will require continued cooperation between members, regulators and value chain partners.

Vegetable & Ornamental

Executive Perspective

The 2025/2026 reporting period reflects a continued evolution of the Vegetable & Ornamentals Executive Management Committee (V&O EMC). Building on the foundation laid in previous years, the committee's work has increasingly moved beyond a narrow focus on government service delivery matters toward a broader, more forward-looking discussion on issues shaping the vegetable and ornamental seed industry.

While regulatory engagement remains a core mandate, committee discussions have covered a wider spectrum of strategic, operational, and systemic challenges affecting the sector locally and internationally.

Committee Focus and Engagement

Post-June 2025, committee engagements were characterised by structured meetings, integrated agendas, stronger linkage between EMC discussions and Seed Production Forum inputs, and increased interaction between regulatory, production, and international developments.

The agenda breadth has expanded to reflect the reality that industry performance is shaped by interconnected systems rather than isolated issues.

Regulatory and Phytosanitary Landscape

Discussions covered phytosanitary import requirements for vegetable seed, ongoing developments in plant breeding innovation and biotechnology, and the implications of regulatory decisions on innovation, seed movement, and competitiveness. New import measures on cucurbits also risk putting strain (supply risk) on the importation of cucurbit seed in the country. Research on Pepper ringspot continues and is now recorded in 8 of the 9 provinces in South Africa. There has also been reports of Biden's mottle virus in sunflower which can also affect lettuce crops, the extent impact has on not yet been noted.

A further development was government's publication of the much awaited new policy framework for Plant Breeders' Rights, which is expected to strengthen intellectual property protection, support ongoing breeding investment, and improve confidence across the value chain. A key priority for the upcoming committee will be alignment on how best the industry

collectively communicates these benefits and the practical value of Plant Breeders' Rights to policymakers and stakeholders.

Hemp seed regulation remained complex and slow-moving. While progress was made on certification frameworks, certification is dependent on legislative alignment across departments. Regulatory changes relating to THC thresholds and permit validity were noted. The Agricultural Research Council's work on production guidelines and varietal development was welcomed. The Committee agreed that continued engagement is essential to safeguard the seed industry's role as the regulatory framework matures.

Seed Production and System Resilience

Seed production discussions focused on system resilience in response to climate variability, labour availability, and regulatory complexity. In addition, increasing trade friction—particularly USA tariff measures and the risk of further duties (including a potential additional 33%)—was recognised as a growing threat to South African seed production competitiveness and to international seed trade flows. There's a need for further diversification and the need to open and develop new markets to reduce exposure to single-market shocks.

Evaluation trials play a critical role in maintaining varietal integrity and market confidence. The focus during this reporting period was the carrot varietal evaluation trial initiated in 2025 and concluded in 2026. The results confirmed that there was no significant deviation from varietal descriptions across companies and no contamination or uniformity concerns warranting market withdrawal. The findings were positively received as evidence of robust industry practices and transparency.

Regional and International Alignment

International developments continued to influence discussions through engagement with global seed organisations and expert groups. The committee continuously receive reports on developments at ISF via David Malan, amongst the most note worthy being climate change on seed production. East Africa seed certification standards for peas and cucurbits were monitored closely and engagement through regional and international forums will continue to prevent trade barriers.

Emerging Themes

Key cross-cutting themes included a shift from reactive to proactive regulatory engagement, increased system-level thinking, stronger integration between the seed sector, regulators/(ion), and production, and broader industry positioning.

Outlook

The Vegetable & Ornamentals EMC is well positioned to continue engaging on regulatory matters, long term industry sustainability, and the strategic positioning of the sector. Looking ahead, emphasis will also remain on managing international trade risks and supporting market diversification, alongside achieving shared industry alignment on the communication of key policy messages—particularly the positive industry impact of the Plant Breeders' Rights policy direction. The need for the sector to quantify its value and contribution to the broader agriculture value chain.

Chairman's Reflection and Acknowledgement

This report marks my final contribution as Chair of the Vegetable & Ornamentals Executive Management Committee, concluding nine years of service on the committee, including five years as Chair.

Over this period, the committee evolved from a forum largely focused on government service delivery into one that addresses a broad and forward-looking range of topics affecting the vegetable and ornamental seed industry.

I extend my sincere thanks to all committee members, past and present, for their commitment, constructive engagement, and continued support. I also acknowledge the SANSOR Secretariat for its professional coordination, governance, and continuity.

It has been a privilege to serve as Chair. I am confident the committee will continue to build on this foundation and contribute meaningfully to a resilient, innovative, and competitive seed industry.

“You have power over your mind—not outside events. Realize this, and you will find strength.” — Marcus Aurelius





Improving seed quality and compliance was a dominant focus area during the year. The committee paid particular attention to the lucerne industry, where inconsistent varietal identity, uncertified seed sales, and misleading marketing practices posed ongoing risks.

Annual Report 2026

Forage and Turf

The SA forage seed market is growing close to a R1 billion industry and its importance in a resilient agricultural sector was clear during the reporting year. In a period where the SA livestock industry was faced by a national Foot and Mouth Disease (FMD) outbreak, severe floods in the north, prolonged droughts in the Southern and Eastern Cape and rising input costs, the forage seed industry played a crucial role in providing high quality seed of a diverse product portfolio for different challenges and conditions. Showing support to the industry, SANSOR made a monetary contribution of R500 000 through Agbiz, for the timeous delivery of FMD vaccines in severely affected dairy production regions. Market pressures and constrained farm finances influenced planting decisions, with increased reliance on core forage species and reduced adoption of higher-cost pasture mixes.

Following seven years of almost no changes to farm gate meat prices, beef prices showed a welcome upward trend and milk prices a steady, incremental increase during 2025. This was in combination with more affordable feeding cost. It seems that farmers are moving from survival mode to a rebuilding phase on herd numbers and bulking up on fodder banks in preparation for a possible drier cycle ahead.

Challenging climatic conditions significantly affected both summer and temperate forage seed production during the period under review. Extremely wet conditions limited establishment and seed harvests in some regions, while dry spells affected seed fill in others, leading to germination challenges in annual summer grasses. The limited availability of quality, locally produced subtropical grass seed is a growing concern in the market, with widespread nematode infestations in weeping lovegrass being one of the main challenges. In response, the committee initiated targeted technical interventions, including the development of an information sheet on nematode risks in weeping lovegrass and the potential implications for subsequent crops.

The latest UFS-NLT lucerne market update indicates that carryover hay from the previous season appears largely cleared with producer prices remaining relatively stable at improved levels and upward price pressure expected in the coming months. Export volumes have declined relative to previous peak years particularly due to weak demand from China. Relatively weak grain prices may shift enterprise choice in favour of lucerne, given its currently favourable gross margin performance. Despite the export demand uncertainty and input cost pressure, the outlook for the 2026/27 season appears cautiously optimistic.

Improving seed quality and compliance was a dominant focus area during the year. The committee paid particular attention to the lucerne industry, where inconsistent varietal identity, uncertified seed sales, and misleading marketing practices posed ongoing risks. As a result, the committee initiated actions to develop clear, industry-aligned communication materials to educate farmers and other stakeholders on the historical background, current status, and limitations of SA Standard, and to reduce the risk of misleading advertising. We continue to encourage members to report any PIA infringements to SANSOR. Another key outcome was the strengthening of quality assurance processes through the NLT. Enhanced quality check procedures and additional labelling requirements for compliant seed cleaners were introduced, aimed specifically at improving traceability and curbing brown-bag sales. These measures marked a tangible step forward in reinforcing trust and accountability across the value chain.

The committee also made good progress in aligning industry positions with evolving regulatory frameworks. Active engagement continued on matters relating to the Plant Improvement Act (PIA), Plant Breeders' Rights (PBR) regulations, hard seed and viability allowances. New species were recommended to the PIA registrar including *Urochloa brizantha*, plantain and *brachiaria*.

Stakeholder engagement remained a core component of the committee's work throughout the year.

A constructive working relationship was maintained with the DoA, particularly in relation to phytosanitary matters, e-certification, variety listing processes, import and export challenges, including consignments delayed at ports of entry involving SARS, the BMA, and the DoA. Interaction with SACTA continued around the implementation and renewal of breeding and technology levies, including the lupin levy and small grains levies. The committee supported initiatives to improve levy awareness through the development of awareness labels.

The committee invited Orizon Agriculture as a stakeholder to present and further engage on sustainability-related themes, to ensure that forage systems remain resilient, commercially viable, and aligned with evolving market and policy expectations. In the previous year they announced their first carbon crop rewards program registered with Verra, based on practices employed by farmers across 16 000 hectares of cropland, up till now the biggest issuance of agriculture based carbon credits in SA. This creates exciting opportunities for farmers to gain environmental and financial benefits from incorporating cover crops in their farming systems.

The committee continued to support forage research and cultivar evaluation through NLT trials, particularly at Jacobsdal, and Outeniqua experimental farm near George. Strengthening and stabilising forage research capacity remains a critical priority. Engagements with academic institutions raised concerns regarding the possible reduction of pasture science content in formal degree programmes, reinforcing the importance of industry-led training initiatives to safeguard technical expertise within the sector. The possibility of an industry supported introductory and advance pasture course is in the pipeline for next year.

Limited progress was made regarding SANSOR seed sales statistics. A dedicated working group was established to review current challenges and guide the development of a new database that will improve data accuracy, usability, and reporting functionality for members.

Looking ahead to the 2026/27 season, the Forage Committee has identified several priority focus areas. These include intensified engagement with co-operatives and farmers to address brown-bag seed sales and on-farm seed conditioning practices, continued advocacy and support around regulatory reforms, and the modernisation of SANSOR forage seed sale statistics database. The committee remains committed to supporting a transparent, sustainable, and globally competitive forage seed sector in South Africa.

Douw Steyn
Chair: Forage & Turf EMC

Expert Technical Groups (ETG) Updates



Phytopsanitary

- The ETG has been split into the Phytopsanitary ETG, which focuses on regulatory and trade matters, and the Seed Health Working Group, which provides technical support for efficient seed trade. Sincere appreciation is extended to Ms Loureine Muller for her leadership over the past three years as chair of the Phytopsanitary ETG. Ms Michelle Hayward, with support from Gjizelle Nel, will lead the ETG over the next three years.
- **Opening of new markets remain a priority, with significant progress on export market for maize seed to the USA.** Work is underway to open new markets for bunching onions, tomatoes, and carrots. Pest lists have been concluded, with some already submitted to NPPOZA. Further engagement with NPPOZA will follow to align on export priorities. Since July 2024, significant progress has been on opening the market for maize seed exports to the USA. The draft operational workplan has been extensively reviewed with SA and the USA reaching agreements on key phytopsanitary concerns.
- **Seed import requirements are under review.** The Department of Agriculture is updating seed import requirements. A key win has been SANSOR's successful positioning with the NPPOZA to ensure import requirement updates are shared with industry for comment prior to implementation. SANSOR appreciated removal of unjustified pests from import requirements of Dahlia. However recent updates to cucurbit phytopsanitary requirements created significant practical difficulties for vegetable seed importers. SANSOR and the NPPOZA are continuing discussions to find a balanced solution that maintains South Africa's biosecurity while not placing undue burden on the seed trade.
- **National engagements are key to driving the seed-agenda.** SANSOR attended the National Department of Agriculture ISPMs Review Workshop (August 2025) as well as the National Plant Health (Phytopsanitary) Act Regulations Workshop (February 2026).

Seed Certification

- **Seed Inspector Refresher Workshops:** The 2026 inspector refresher workshop focused on groundnuts and cowpeas and was hosted at Schweizer-Reneke from 25 – 26 February. The workshop was a success, with guest presentations from Variety Control (NDA), ARC and the SA Groundnut Forum. The upcoming refresher workshop will be on small grains.
- **SANSOR Training:** The 2025 theoretical training courses for the authorisation of seed samplers, field inspectors and phytopsanitary field inspectors were well attended, with 60, 58 and 15 attendees respectively. The dates for the 2026 courses will be 17 – 28 August 2026.

- **Plant Improvement Act Regulations:** The new Act and its regulations were proclaimed on 1 December 2025, and the changes were communicated to members. The new regulations will be incorporated into the Seed Certification Scheme, when the Scheme Expert Working Group meets for their annual Scheme Review meeting in July 2026.
- **Certification Database:** Training for members has been substantially reduced, focusing mainly on new members. Members are now able to manage their own internal training. Additional support requests from members are mainly for high-level matters.
- **OECD Seed Scheme:** SANSOR, as mandated by the Seed Certification ETG, continues to provide valuable technical input into the OECD Seed Schemes, ensuring that South Africa complies with international production and certification practices to facilitate the international movement of certified seed.

Seed Analyst

- **Seed Analyst Webinar:** The 7th SANSOR Seed Analyst Webinar was hosted online on the 15th of October 2025, with 134 attendees. The webinar was on Statistics, with a particular focus on ISTA Proficiency Tests and Tolerance Tables. The webinar was presented by Mr Kirk Remund and Dr Jean-Louis Laffont, who are both part of the ISTA Statistics Committee. SANSOR made a donation of 450 Swiss Francs to Young@ISTA. The 2026 webinar will be on Seed Identification, with a focus on ISTA universal species.
- **Proficiency Tests:** SANSOR initiated an industry proficiency test for Purity on *Eragrostis curvula*. Eight labs participated in the industry PT, and they all received an A-rating. The National PT as arranged by the OSTL was on sunflower and spinach, with the results set to be released in May 2026.
- **Seed Analyst Practical Training Course:** The 2025 seed analyst practical training course and examinations were well attended with 16, 11 and 7 candidates taking part in the Agronomy, Horticulture and Forage examinations respectively. The 2026 dates were identified as 06 – 10 July 2026 for the practical training course and 19 – 23 October 2026 for the practical examination. The training and examinations will still be a collaboration between the OSTL, Starke Ayres and SANSOR.
- **Standardised Weed List:** Members of the ETG are working on a standardised weed list. This is an ongoing project.
- **ISTA Workshops:** ISTA hosted a Purity and Other Seed Determination Workshop at Seed Quality Services (KKSP), in Oudtshoorn from 09 – 11 September 2025. The workshop was a success and subsequently, ISTA will be hosting another workshop at the same venue on Germination and Tetrazolium Testing from 03 – 05 November 2026.

Plant Breeding Innovations

- **Advocating for innovation-friendly policies continues into 2026.** The European Union has taken a significant stride in developing fit-for-purpose gene editing regulations through the provisional agreement reached during December 2025. In South Africa, gene editing regulations remain regulated under the GMO Act. In the past year, several engagements between industry and local regulators have taken place and SANSOR will continue to advocate for innovation-friendly policies that support local innovation. To this end, SANSOR co-hosted an industry session at the Southern Africa Plant Breeders' Association to highlight the science and benefits of plant breeding innovations.
- **International conventions and treaties affecting SA are being monitored.** The 11th session of the Governing Body to the International Treaty on Plant Genetic Resources for Food and Agriculture met in Peru (24–29 November 2025) to operationalize the multilateral system of access and benefit sharing. The session did not reach a conclusion. Hotspot areas under discussion were payment structure and rates, expansion of Annex 1 crops, and Digital Sequence Information (DSI). Discussions on access and benefit sharing for DSI for both the Convention on Biological Diversity and ITPGRFA are ongoing.

Intellectual Property

- **The PBR Act of 2018 and associated Regulations (2025) came into force 1 June 2025.** The 2018 Plant Breeders' Rights (PBR) Act, which is aligned with UPOV 1991, was promulgated on 1 June 2025 following the publication of the regulations in the Government Gazette. Industry appreciates the following: i) longer protection (from 20 to 25 years), ii) automatic provisional protection, and iii) infringements are classified as a criminal offence. Exemptions to PBR are now classified per farmer type and amounts of seed saved which trigger two crucial conditions: farmer declarations and royalty payments, which also affect seed conditioners. Kisch IP presented an overview of the new Regulations at the ETG in November 2025, which was followed by divisional meetings in January 2026. Engagements with members and other key stakeholders will continue to align on critical matters.
- **Combatting illegal seed practices advocacy focus for 2026.** The IP ETG has raised increased awareness on illegal seed practices and measures to guard against these actions as a key focus are for the industry. The Communications ETG will support the IP ETG in combatting illegal seed practices through advocacy and awareness campaigns.

Expert Technical Groups (ETG) Updates (cont.)



Capacity Development & Promotion

- **AgriSETA:** An application was submitted to AgriSETA for funding of postgraduate students as well as for commodity funding. Outcomes are being awaited. Seven students will be supported from commodity funding to attend the 2026 AFSTA Congress as well as participate in a Soft Skills Workshop facilitated by Impact Academy prior to attending the Congress.
- **Bursaries and Graduate Placements:** Following a review of all applications received for the 2026 academic year, SASNOR awarded three new postgraduate bursaries. These included one MSc student from the University of Zululand, one MSc student from the University of the Free State, and one PhD candidate from the University of Pretoria. In addition, one MSc student from the University of KwaZulu-Natal will continue to receive bursary support for the duration of their studies.
- **Remuneration survey:** The Remuneration Survey, initiated in 2025, saw participation from 32 member companies and incorporated relevant international benchmarking data. Data collection was nearing completion at the time of reporting, with results expected by 27 February 2026, after which findings will be shared with members. Mercer South Africa was engaged to conduct the survey, with specific emphasis placed on accommodating combined job roles, a critical requirement identified by the sector. Mercer has committed to providing ongoing training and support to assist members in understanding and applying the survey results, with initial support already provided to participating companies. Feedback was shared to improve future surveys, particularly relating to platform usability, practical training, and reducing the administrative burden on members. These insights will inform engagement with Mercer going forward and guide decisions on future remuneration benchmarking initiatives.

Communications

- **Development of Advocacy Message House:** A structured Advocacy Message House will be developed, with a central message supported by proactive, reactive, and crisis messaging aligned to key priorities. Core pillars will address Intellectual Property, Illegal Seed Practices, and Innovation, alongside strengthening SANSOR's image as the authoritative seed trade association.
- **Video and Content Creation:** The SANSOR YouTube channel will be revitalised to integrate short and long-form content aligned with the Advocacy Message House. A SANSOR podcast series will be explored over the next 12–18 months, alongside a review and optimisation of the website and social media platforms to strengthen outward-facing engagement.

International & National Representation

International Seed Federation

| | |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ISF Board of Directors | <ul style="list-style-type: none">• Lukeshni Chetty National Seed Association Advisory Group Vice-Chair• Nick Goble Field Crops Advisory Group Chair |
| ISF Advisory Groups | <ul style="list-style-type: none">• National Seed Association AG Lukeshni Chetty• Field Crops AG Nick Goble• Vegetable & Ornamental AG David Malan• Forage & Turf AG Brian Lever |
| ISF Expert Groups | <ul style="list-style-type: none">• Vegetable Seed EG David Malan Best practices for vegetable seed production• Systems Approach EG David Malan 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. |
| ISF Coordination Groups | <ul style="list-style-type: none">• Value Chain CG David Malan Enhance the importance of seed in the value chain.• Phytosanitary CG Rikus Kloppers 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 & Trade CG Lukeshni Chetty & David Malan To advocate for science-based policies within seed legislation to ensure the accessibility of quality seeds to all.• Plant Breeding Innovation CG Miekie Human Promote and encourage science-based regulations for Plant Breeding Innovations globally.• Genetic Resources CG Glendon Ascough 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 CG Kruger van Wyk To work collectively as seed industry to ensure efficient protection of IP rights for plant varieties to increase trade and investment.• Arbitration CG Brian Lever Align the ISF arbitration rules with those of ISTA. |

African Seed Trade Association

AFSTA Board of Directors:

- Kulani Machaba | Previous president
- Matome Ramokgopa | SANSOR Representative | 2026 - Current

South African Cultivar & Technology Agency

SACTA Board of Directors:

- Lukeshni Chetty | SANSOR | 2017 -2026
- Kobus van Huyssteen | SANSOR | 2026 - Current
- Deon van Rooyen | Honorary member

International & National Representation (cont.)

Agriculture and Agro-processing Master Plan | Value Chain Round Table Working Groups

| | |
|-----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Policy & Regulatory WG | Kobus van Huyssteen & Mieke Human Platform for stakeholders to collaborate with policymakers and regulatory authorities to guide and implement policies and regulations that support and create an enabling environment towards the growth and sustainability of the grain value chain. |
| Research & Development WG | Kobus van Huyssteen & Mieke Human Platform to facilitate collaborative research, development, innovation and promote knowledge and information dissemination to advance productivity of the grain value chain. |
| Transformation WG | Kobus van Huyssteen & Mieke Human Platform to promote, monitor, evaluate and contribute towards the advancement of transformation within the grain value chain industry by fostering inclusivity, empowerment and sustainability. |
| Logistics, Transport & Infrastructure WG | Kobus van Huyssteen & Mieke Human Platform to optimize the efficiency and effectiveness of the transportation, logistics and infrastructure of the grain value chain. |
| Trade WG | Kobus van Huyssteen & Mieke Human Platform to conduct the groundwork on improving South Africa's Grain industry and ensuring compliance with linked sanitary and phytosanitary measures, while focusing on the promotion, retention, and optimization of market access for South African grains. |

Industry Forums

| | |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| OECD Seed Schemes | Kobus van Huyssteen International framework for the certification of seed to facilitate global trade by setting standards for seed production and ensuring seed varietal identity and purity. |
| Wheat Forum | Wheat Forum Steering Committee Kobus van Huyssteen Mieke Human Lukeshni Chetty Promote a sustainable and economically viable wheat industry to benefit all role players. |
| Maize Forum | Maize Forum Steering Committee Mieke Human Kobus van Huyssteen Lukeshni Chetty Promote a sustainable and economically viable maize industry to benefit all role players. |
| Maize Forum | Maize Production Research Panel Mieke Human Review and make recommendations on new funding applications and progress reports submitted to the Maize Trust. |
| National Grain Research Programme | Board of Directors Mieke Human Platform to foster closer collaboration between industry, government and the research community. |
| Department of Agriculture | Plant Improvement Certification Forum Kobus van Huyssteen & Thabiso Ntsele Share experiences, identify areas of common interest and challenges and find solutions for the challenges in the respective certification schemes as administered in terms of the Plant Improvement Act. |
| Department of Agriculture | Pest Steering Committees Kobus van Huyssteen & Mieke Human Ad hoc committees established to attend to pressing matters as the need arises. |
| Soybean and Sunflower Forum | Kobus van Huyssteen To bring together industry stakeholders to support the development, coordination, and sustainability of the soybean and sunflower value chains through information sharing, research support, and strategic industry alignment. |
| Groundnut Forum | Kobus van Huyssteen To promote the growth and competitiveness of the groundnut industry by facilitating collaboration among stakeholders, addressing industry challenges, and supporting research, development, and market access initiatives |

SANSOR Board



Matome Ramokgopa
*Board of Directors
Vegetable & Ornamental
Chair*



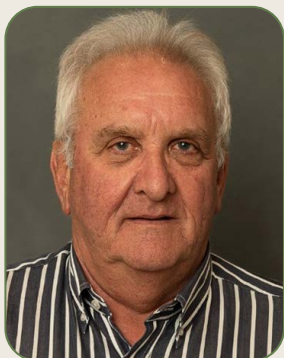
Lukeshni Chetty
General Manager



Nick Goble
Field Crops Chair



Douw Steyn
Forage & Turf Chair



Brain Lever
Open Seat



David Malan
Open Seat



Christopher Volbrecht
Open Seat



SANSOR Expert Technical Group (ETG) Chairs



Loureine Muller
Phytosanitary



Bertus Herholdt
Seed Certification



Sarah Schulze
Seed Analyst



Reinette Champanis
*Plant Breeding
Innovation
(Co-Chair)*



Yolande Nel
*Plant Breeding
Innovation
(Co-Chair)*



Pieter Craven
Intellectual Property




Sheryl Wulfsohn
*Capacity Development
& Promotion*




Lerato Luzipo
Communications



 +27 12 472 9500

 accounts@sansor.org

 www.sansor.org

 Private Bag x10 Suite 89,
Menlo Park, 0102, Pretoria,
South Africa

352 Kiepersol Road,
Lynnwood, 0081 Pretoria,
South Africa

