# A PROFILE OF THE SOUTH AFRICAN DRY BEAN MARKET VALUE CHAIN

## 2020


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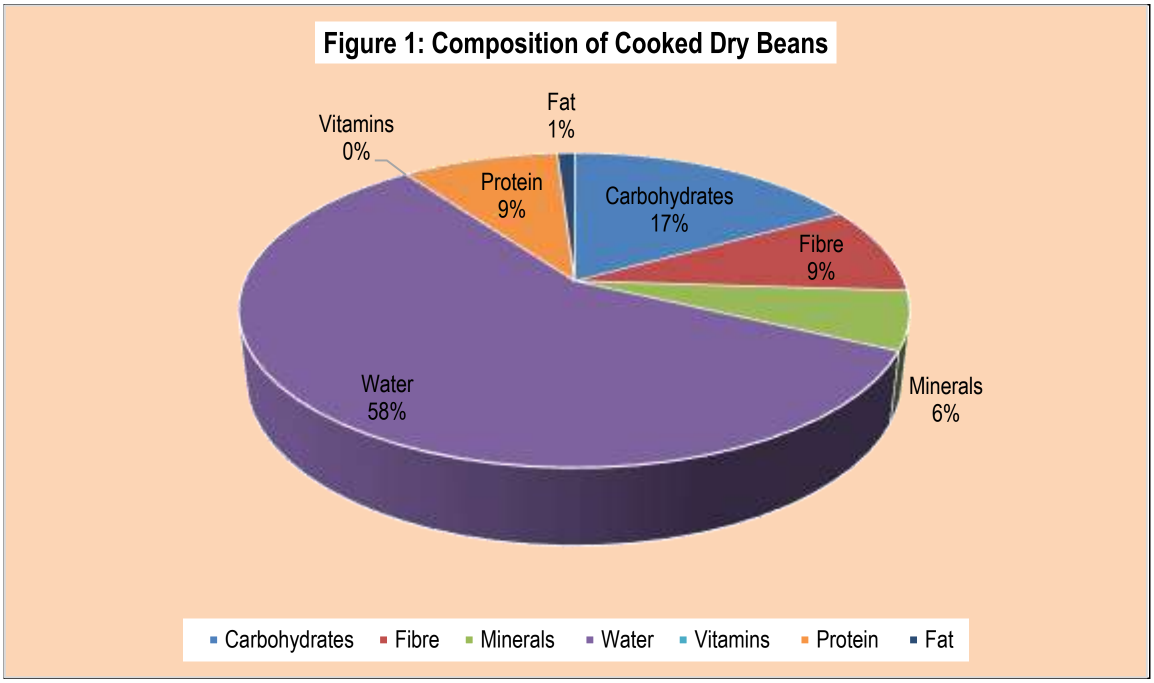
# 1. DESCRIPTION OF THE INDUSTRY

Dry beans are a very good source of plant proteins, complex carbohydrates, soluble and insoluble dietary fibres have a low salt and fat content and no cholesterol. They also prevent degenerative western illnesses. Research results also indicate that with regular use, beans reduce cholesterol. The composition of cooked dry beans is shown in Figure 1 below.

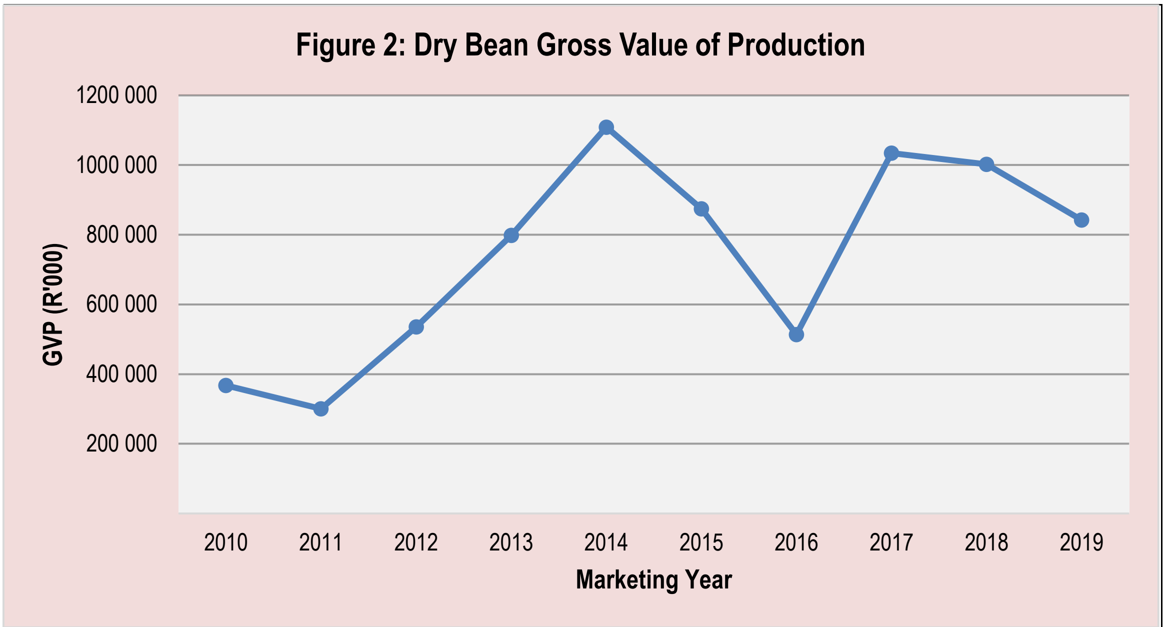



**Source: Dry Bean Producers Organization**

In South Africa, three types of beans are mainly produced, namely Red Speckled beans, Small White canning beans and Large White Kidney beans. The Red Speckled beans command the biggest market share and are mainly sold in retail quantities in the supermarkets for preparation at home. Small White canning beans are mainly used for canning purposes and because of the increasing consumer demand for convenience foods, there is a growing market for these beans. Large White Kidney beans are mainly used for retail packaging and to a lesser extent for canning purposes. Other locally produced bean types such as the Haricot beans have a very limited domestic market.

Dry beans are an ideal rotation crop and research has shown that dry beans ensure higher yields in a crop rotation system. From an economic perspective it makes sense to plant beans in a crop rotational system with maize on suitable soils. The recommendation is one year of dry beans out of every three to four years in a crop rotation system.

The contribution of the dry bean industry to the gross value of agricultural production for the past decade is depicted in Figure 2 below.



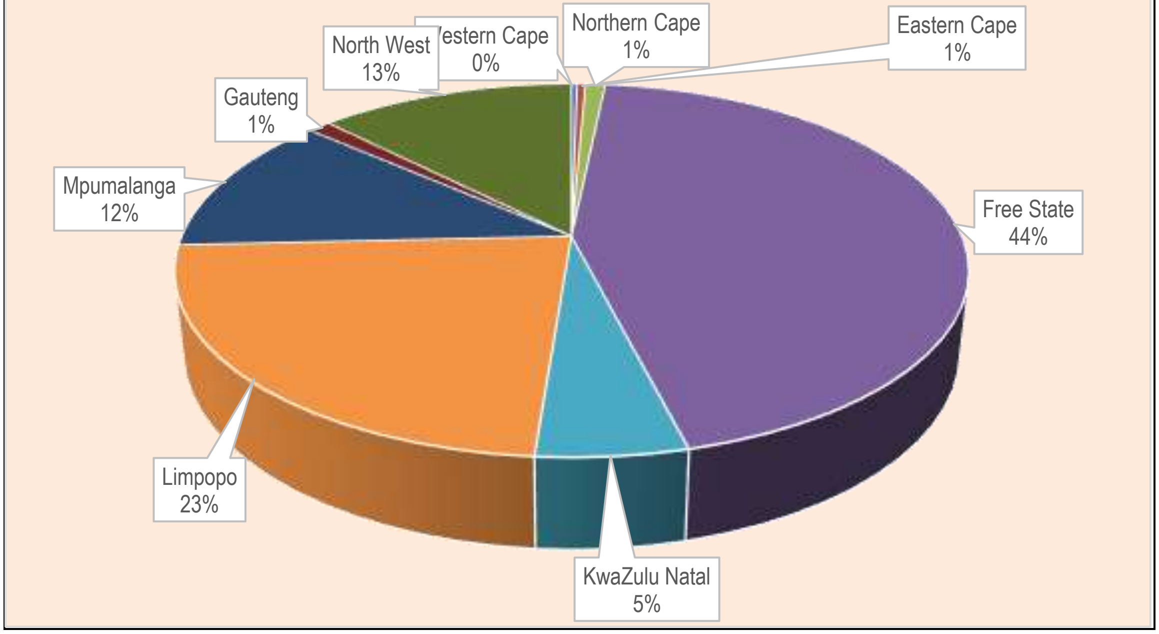

**Source: Statistics and Economic Analysis**

Figure 2 shows the gross value of dry bean production between the years 2010 and 2019. On average, the local dry bean industry contributed R737 million towards the gross value of agricultural production and this represents about 2% contribution towards the total average field crop's GVP. The figure further indicate that the highest dry bean industry's contribution to the gross value of agricultural production was attained during the year 2014 when the value of dry beans produced locally amounted to over R1.1 billion. The lowest value of dry beans produced in the country was recorded in 2011, and it amounted to only R300 million. Following severe drought circumstances in 2015, the value of dry bean production declined significantly to R874.5 million. This was followed by a further decrease to R513.9 million in 2016. The period under analysis closed with a declining gross value of dry bean production slightly above R1 billion mark in 2019.

## *1.1 Production Areas*

Dry beans in South Africa are produced in the following areas: Mpumalanga/Gauteng (Middelburg, Nigel, Delmas and Ermelo), Free State (Bethlehem, Fouriesburg, Harrismith and Kroonstad), North West (Lichtenburg, Koster, and Brits), Limpopo (Thabazimbi, Koedoeskop), Kwazulu-Natal (Kokstad, Vryheid, Bergville, and Winterton) and Northern Cape (Kimberley, Douglas). Limpopo, North West, Free State, Kwazulu-Natal and Northern Cape are commercial production areas while the Lowveld in the Mpumalanga province and the Western Cape are seed production areas.

The distribution of dry bean production in South Africa for 2019 production season is indicated in figure 3 below. The figure indicates that larger volumes of dry beans were produced in the Free State, Limpopo, North West and Mpumalanga provinces, respectively. These are followed by very minimal production recorded from Kwazulu Natal, Northern Cape and Gauteng provinces. Furthermore, the figure clearly indicates that Free State, North West and Limpopo Provinces combined accounted for about 80% of South Africa's total dry bean production during 2019 production season, with the remaining six provinces contributing only 20%.




**Source: Statistics and Economic Analysis**

**Table 1: Dry beans production trend by provinces**

| PROVINCE | Production (tons) 2014/'15 | Production (tons) 2015/'16 | Production (tons) 2016/'17 | Production (tons) 2017/'18 | Production (tons) 2018/'19 | Mean (tons) (2012/13-2018/'19) |
|---|---|---|---|---|---|---|
| Western Cape | 400 | 200 | 200 | 0.00 | 200 | 200 |
| Eastern Cape | 1000 | 400 | 400 | 100 | 800 | 540 |
| Northern Cape | 2200 | 600 | 1500 | 1100 | 2000 | 1480 |
| Free State | 29400 | 17000 | 25200 | 36000 | 28400 | 27200 |
| Kwazulu-Natal | 7800 | 2600 | 5400 | 3000 | 4200 | 4600 |
| Limpopo | 16800 | 9000 | 10000 | 12000 | 15600 | 12680 |
| Mpumalanga | 10800 | 7200 | 7700 | 7200 | 6000 | 7780 |

| PROVINCE | Production (tons) 2014/'15 | Production (tons) 2015/'16 | Production (tons) 2016/'17 | Production (tons) 2017/'18 | Production (tons) 2018/'19 | Mean (tons) (2012/13-2018/'19) |
|---|---|---|---|---|---|---|
| Gauteng | 4800 | 3500 | 1900 | 1800 | 2200 | 2840 |
| North-West | 6700 | 3600 | 12000 | 9600 | 11600 | 8700 |
| **Total** | **79900** | **44100** | **64300** | **70800** | **71000** | **58210** |

**Source: Statistics and Economic Analysis**

Table 1 confirms the earlier observation that Free State, Mpumalanga, North West and Limpopo Provinces are the major producers of dry beans. The table shows that the Free State produces an average of 27 thousand tons of dry beans per year, followed by the provinces of Limpopo, North West, and Mpumalanga, which produce an average of 12 680, 8 700, and 7 780 tons per year, respectively. On average, the dry bean production volumes across the provinces show some fluctuation trends over the period under analysis, except for Limpopo province were production has been consistently increasing for the past four years.

## *1.2 Local Production*

It is estimated that there are roughly 1 200 dry bean producers in South Africa who produce an average of about 67 800 tons of dry beans per annum. Table 2 below shows that the area under cultivation for dry beans in South Africa has been fluctuating considerably and this also impact negatively on the production volumes of dry bean. On average area planted for dry beans is 48 thousand hectare per year and this implies the number of hectares planted to beans is still not at a level where imports can be restricted to the essential consumption requirements. The area planted for dry beans in the country fluctuated between 40 000 and 64 000 hectares between 2010 and 2019. A reasonable increase in the number of hectares planted to beans will only materialize once profitable producer prices are obtained for consecutive years, which can result in several new entrants to the industry. Furthermore, it needs to be considered that producers have limited planting capacity in respect of beans within their crop rotation system and thus there is therefore little possibility of unlimited expansion in bean plantings or the maintenance of larger plantings.

**Table 2: Dry Beans-Areas planted and Total production**

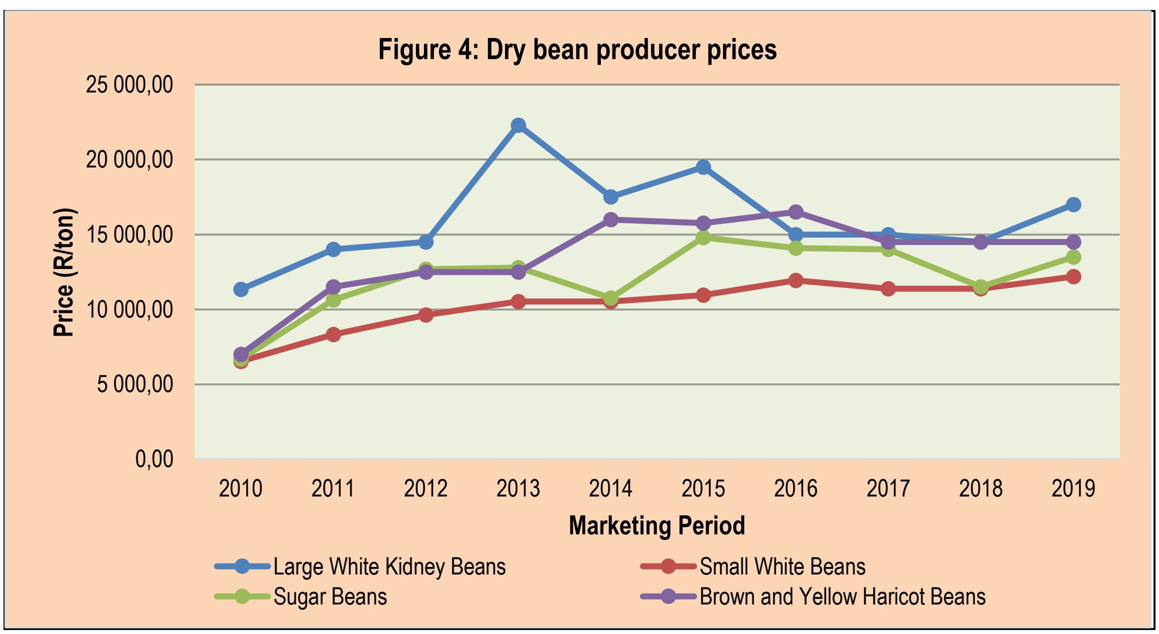
| Production Year | 2010/11 | 2011/'12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 |
|---|---|---|---|---|---|---|---|---|---|---|
| Area Planted (1000 ha) | 42 | 40 | 44 | 56 | 64 | 34 | 46 | 45 | 59 | 59 |
| Total Production (1000 tons) | 46 | 52 | 66 | 90 | 88 | 39 | 71 | 75 | 76 | 73 |

**Source: Statistics and Economic Analysis**

## 2. MARKET STRUCTURE

### *2.1 Domestic Market*

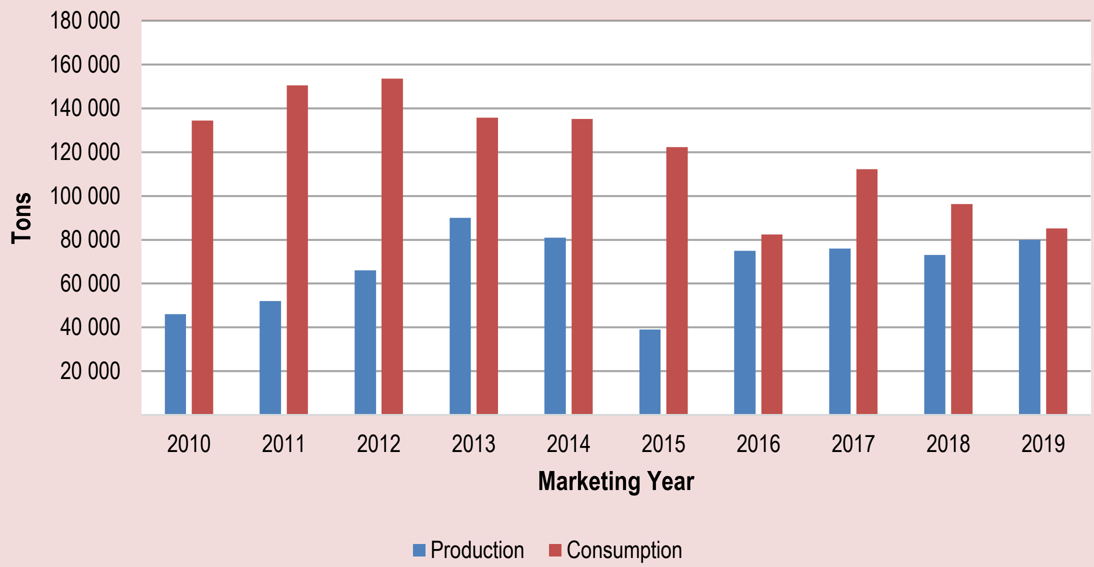
The industry has experienced fluctuations in producer prices over the past ten years as can be observed in Figure 4 below. It is also clear from Figure 4 that the period under analysis opened with slightly lower producer price levels for all 4 types of beans available in South Africa. Generally during the period under review, large white kidney beans have always fetched higher prices in comparison to other types of beans. Furthermore, since 2010, producer prices for all four types of dry beans have risen, with large white kidney beans fetching the greatest price compared to other types between 2010 and 2019, with the exception of 2016, when the producer price of brown and yellow haricot beans was slightly higher The highest prices for all types of beans were observed during the year 2013 while the lowest prices were experienced during the opening of the season in 2010. The period under analysis closed with increasing trends and consistent producer price for all types of beans during the year 2019.




**Source: Statistics and Economic Analysis**

Figure 5 below confirms an earlier observation that during the entire period under review the domestic consumption of dry beans in South Africa topped the total production. This situation became even more pronounced from the year 2010 until 2019. On average, South Africa produces about 67 800 thousand tons of dry beans per annum while the average annual consumption is sitting at 120 777 thousand tons. This implies that the local dry beans market is able to supply only about 56% of the domestic consumption requirements while the balance is imported.

**Figure 5: Dry bean production vs consumption**



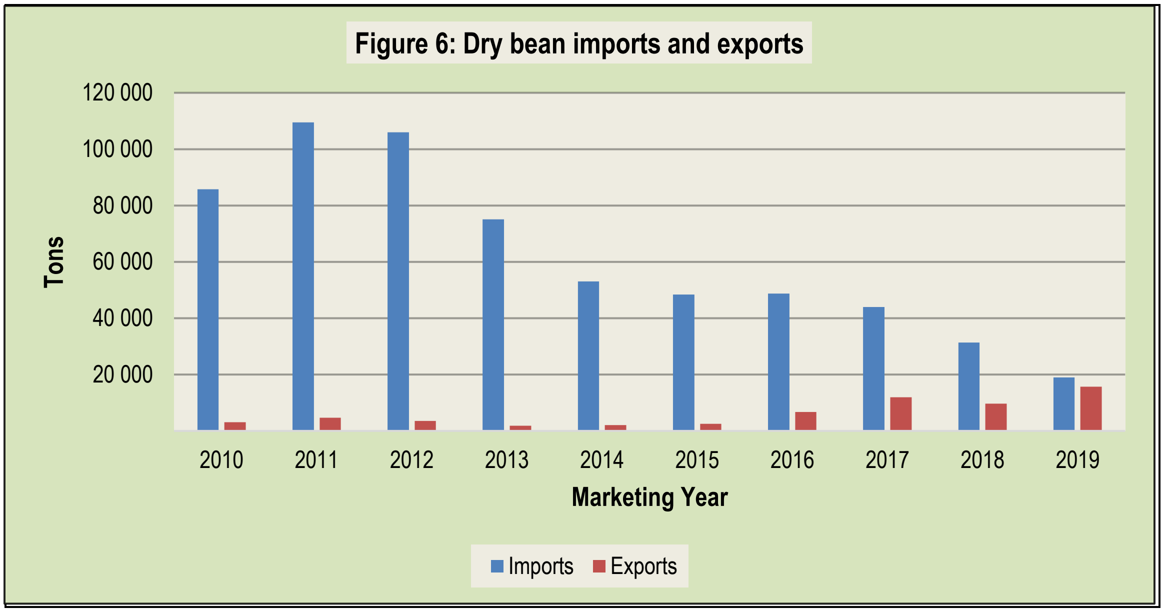

**Source: Statistics and Economic Analysis**

## *2.2 Exports*

Approximately 6 160 tons (on average) of dry beans are exported per annum. South Africa exports dry beans mostly to neighbouring African countries such as Eswatini, Zimbabwe, Botswana, Kenya and Lesotho. Minimal exports of dry beans were also recorded from South Africa to other countries such as India and the United Arab Emirates. The export of specific types of beans depends on the demand for the type concerned, coupled with the specific quality requirements. The Dry Bean Producers Organization has, during the year 2004 established an electronic trading platform for beans, known as Beanex. Through this marketing medium, beans are traded electronically on the internet. Participating sellers offer specific quantities of beans for sale and buyers select their purchases on the strength of digital photos and a digital grading certificate in respect of the consignment on offer.

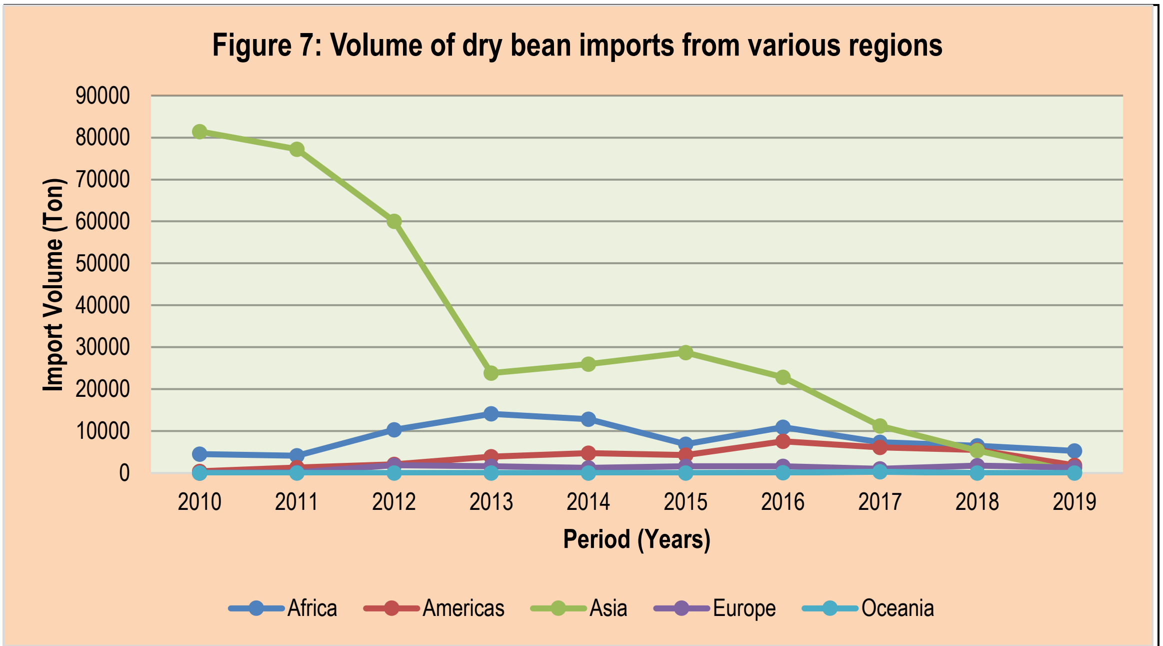
## *2.3 Imports*

As a result of the existing shortages of locally produced dry beans, imports are used to meet the ever increasing demand for beans as shown in Figure 6 below. Shortages in the domestic consumer market have been supplemented by means of imports originating mainly from Ethiopia (36.2 %), Poland (15.4 %) and USA (12.7 %) during the year 2019. The rest of the imports originate from other countries such as Argentina, Canada and China.



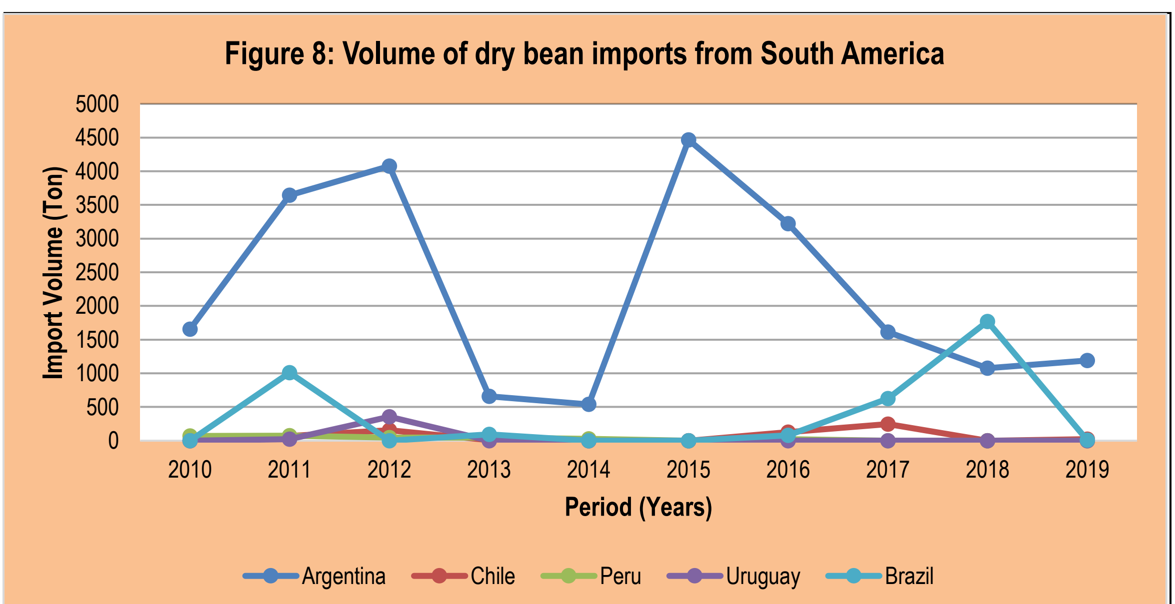

**Source: Statistics and Economic Analysis**

Figure 6 above clearly shows that South Africa is a net importer of dry beans. On average South Africa imported about 62 thousand tons of dry beans per annum, which is 56 thousand tons more as compared to the 6 thousand tons that were exported. The figure shows that dry beans imports by South Africa started to decline between the years 2013 and 2019. During the period under review, the volume of dry beans exported by South Africa were very minimal and continued to decrease further in 2015. In 2016, dry bean exports from South Africa started to increase until the highest exports of about 15 700 tons were reached in 2019. It is also clear from Figure 6 that South Africa experienced trade deficit with regard to dry beans for the entire period under analysis. The volumes of dry bean imports from various regions are presented in Figure 7 below.



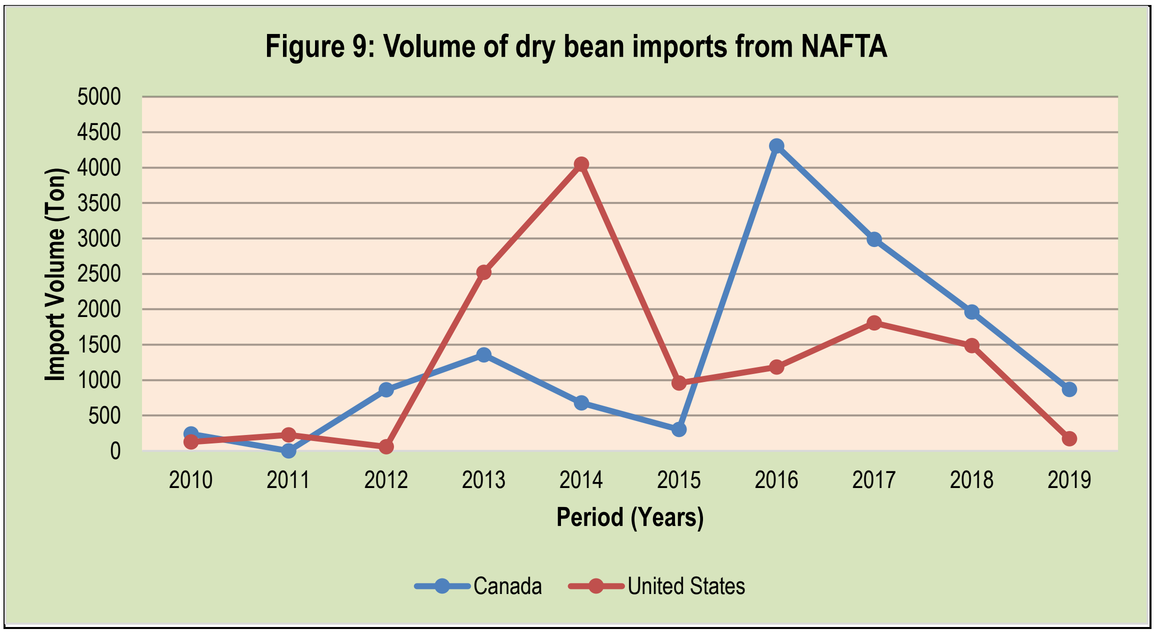

**Source: Quantec Easy Data**

Figure 7 indicates that South Africa imports dry beans from almost all regions. The majority of dry beans imported by South Africa originated from Asia followed by Africa and Americas during the period 2010 and 2019. However the ten year average (2010 to 2019) annual dry bean imports statistics reveal that, on average, Asia is responsible for 72% of dry beans imported by South Africa while China alone accounts for about 98%, implying that only 2% originate from other Asian countries. Other regions such as Africa, the Americas, and Europe (all together), contributed only 28% towards the total dry beans imports by South Africa. South Africa source only 17% of its total dry bean imports from the African continent.



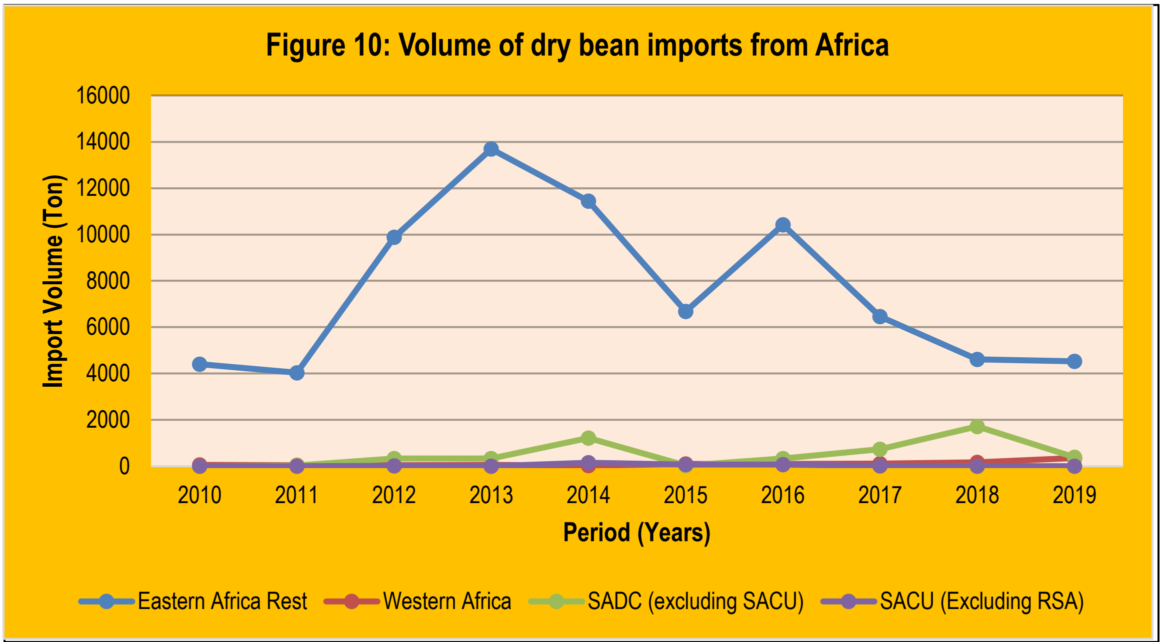
**Source: Quantec Easy Data**

Figure 8 shows that, in the South Americas, South Africa imports dry beans largely from Argentina and Brazil with irregular imports coming from Chile. The figure further indicates that dry bean imports from South Americas were at lower levels in 2010 and 2011, trading below 5000 tons. During the year 2012, volumes of dry bean imports originating from Argentina emerged to be the greatest and surpassing those from other regions. However, only very small volumes of dry bean imports from South America were recorded in 2013 and 2014 respectively, until a record highs in imports from Argentina was reached in 2015. The general observation from the figure is that dry bean imports from South America have been very low and erratic over the period under analysis. In 2019, the period under review closed with increasing volumes of dry beans imports originating mainly from Argentina, while imports from other regions remained lower.




**Source: Quantec Easy Data**

From the North American Free Trade Area (NAFTA) as presented by figure 9 above, dry bean imports originate mainly from the United States of America and Canada. The volume of dry bean imports from this countries reached a peak in 2014 and 2016 respectively. The period under review opened with moderate volumes of dry beans imports originating from Canada in 2010, while those from the United States were at the lowest levels. Throughout the time period under consideration, the volume of dried bean imports from NAFTA fluctuated significantly. During the years 2010 and 2011, and again in 2015, very few and eratic imports from NAFTA were recorded. The period under review closed with declining volumes of dry bean imports from both Canada and the USA, with imports from Canada surpassing those from the USA in 2019.




**Source: Quantec Easy Data**

Figure 10 indicates that on the African continent, South Africa import dry beans mainly primarily from the Eastern Africa followed by SADC and SACU regions. It is clear from the figure that East Africa is the principal exporter of dry beans to South Africa on the African continent. Imports of dry beans from this region have been fluctuating above other African regions over the period under review. Between 2012 and 2014, imports from Eastern Africa began to increase dramatically, reaching record highs in 2013. South Africa imports dry beans primarily from Ethiopia in the Eastern African region. It is also evident from Figure 10 that the period under review closed with declining imports of dry beans from the Eastern Africa. South Africa's dry beans import from Eastern Africa continued to dominate and closed higher above all other regions in 2019.

## 3. PROCESSING

Dry beans are available to the consumer either as packed dry beans or as processed dry beans. Red speckled, Large White Kidney and Small White beans are canned in a saline solution and can also be canned in tomato sauce (baked beans). The difference between beans canned in tomato sauce and those canned in a saline solution (brine) is that the latter can be used for any recipe, including puddings, cake, etc.

According to industry experts, the canning side of the market is in the region of 15 000 to 17 000 tons per annum. This implies that pre-packers use around 100 000 tons of beans per annum. A small percentage (approximately 15%) of the local bean crop is used for canning of beans. Canners try to meet their requirements locally, but have, in the past, bought relatively large quantities on the international market. The largest canner in SA, which cans more than 50% of the beans, is situated in Gauteng. Other canners are found in the Western Cape, Kwazulu-Natal and Mpumalanga.

### *3.1 Market Value Chain*

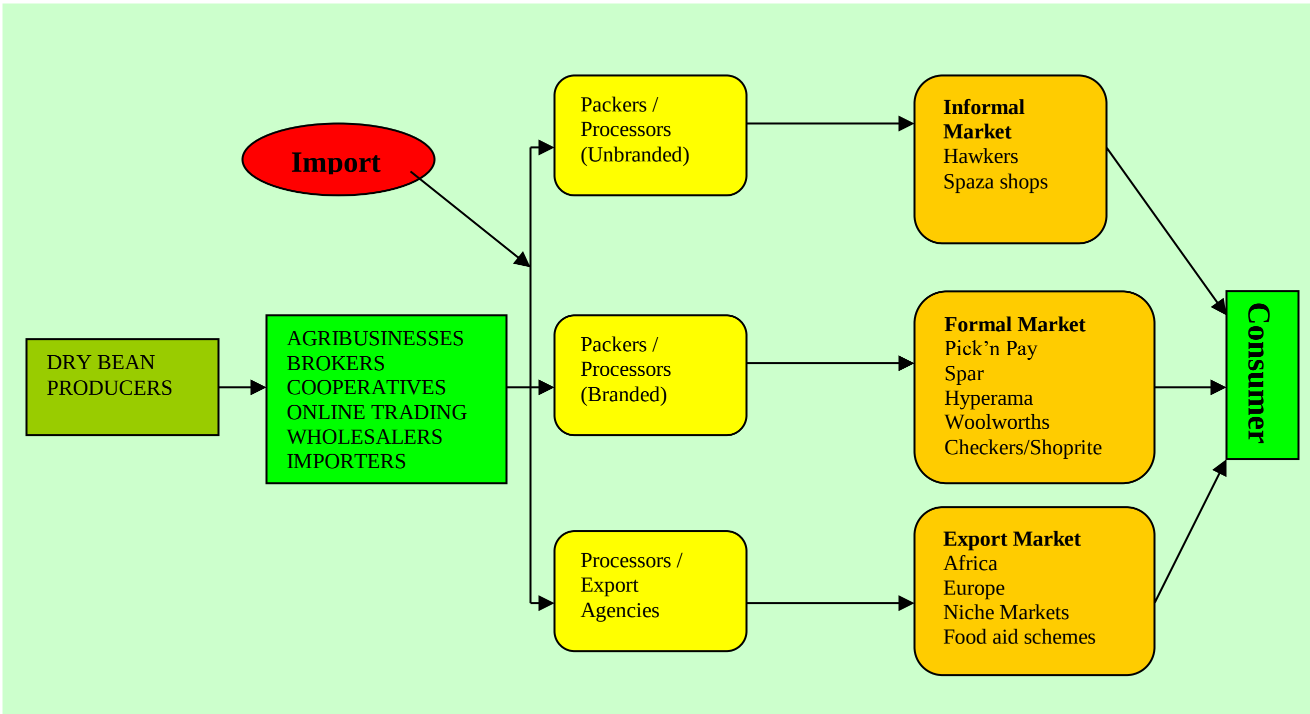



**Figure 11: Market value chain for dry beans**

Dry bean producers can sell their product directly to the trade or they can sell to the first point of sale in the marketing value chain such as wholesalers and co-operatives. Beans can be sold to packers or processors and if they are unbranded they are sold in the informal market through spaza shops and hawkers. If they are branded they get to the formal market through the chain stores such as Pick 'n Pay, Spar, Hyperama, Woolworths and Checkers/Shoprite. Split beans can also be exported to niche markets in the form of flour and the bread and pasta industry make use of it.

As mentioned earlier on the Dry Bean Producers' Organization has established an electronic trading platform for beans known as Beanex. Through this marketing medium beans are traded electronically on the internet. The sellers, who participate offer specific quantities of beans for sale and buyers, select their purchases on the strength of the digital grading certificate and digital photos of the consignments that are on offer.

## 4. MARKET INTELLIGENCE

### *4.1 Tariffs*

The following table below indicates the tariffs that are applied by other countries on imports of dry beans originating from South Africa:

**Table 3: Tariffs faced by South African exports of dry beans**

| COUNTRY | PRODUCT DESCRIPTION | TRADE REGIME DESCRITION | APPLIED TARIFFS (2019) | ESTIMATED TOTAL *AD VALOREM* EQUIVALENT TARIFF (2019) |
|---|---|---|---|---|
| India | Dried Beans: 07133390 | Intra SACU rate | 0.00% | 0.00% |
| | Dried Beans: 07133310 | Intra SACU rate | 0.00% | 0.00% |
| Eswatini | Dried Beans: 07133310 07133320 | MFN duties (Applied) | 0.00% | 0.00% |
| | | MFN duties (Applied) | 5.00% | 5.00% |
| United Arab Enirates | Dried Beans: 07133390 07133310 | Preferential tariff for South Africa | 30.00% | 30.00% |
| | | Preferential tariff for South Africa | 30.00% | 30.00% |
| Zimbabwe | Dried Beans: 07133310 | MFN duties (Applied) | 0.00% | 0.00% |
| | 07133390 | MFN duties (Applied) | 0.00% | 0.00% |
| Botswana | Dried Beans: 07133390 | Intra SACU rate | 0.00% | 0.00% |
| | Dried Beans: 07133310 | Intra SACU rate | 0.00% | 0.00% |
| Kenya | Dried Beans: 07133390 | Intra SACU rate | 0.00% | 0.00% |
| | Dried Beans: 07133310 | Intra SACU rate | 0.00% | 0.00% |
| Lesotho | Dried Beans: 07133390 | Intra SACU rate | 0.00% | 0.00% |
| | Dried Beans: 07133310 | Intra SACU rate | 0.00% | 0.00% |

**Source: Market Access Map**

Table 3 indicates that South African dry bean exports face higher export duties when exported to countries such as India and the United Arab Emirates. Although countries such as Eswatini and Lesotho impose import duties on dry beans originating from elsewhere, South Africa can export dry beans to these countries duty free due to the existence of Intra-SACU free trade arrangements.

With regard to the local situation, South Africa levies a duty of 10% on imports of dry beans originating from the rest of the world. However, dry bean imports from the European Union, SADC and SACU member states can enter South Africa free of duty due to the existence of the following trade Agreements which are currently in force: Agreement on trade, development and corporation between the European Union and South Africa; SACU agreement; and SADC Trade Protocol.

In order to fulfil South Africa's commitment under the World Trade Organization: Marrakesh Agreement regarding market access, the Directorate Marketing issues rebate permits under the Market Access rebate scheme to importers of dried beans for a total of 11 063 tons (for 2019) per annum. The import arrangements for importers of dried beans are as in Table 4.

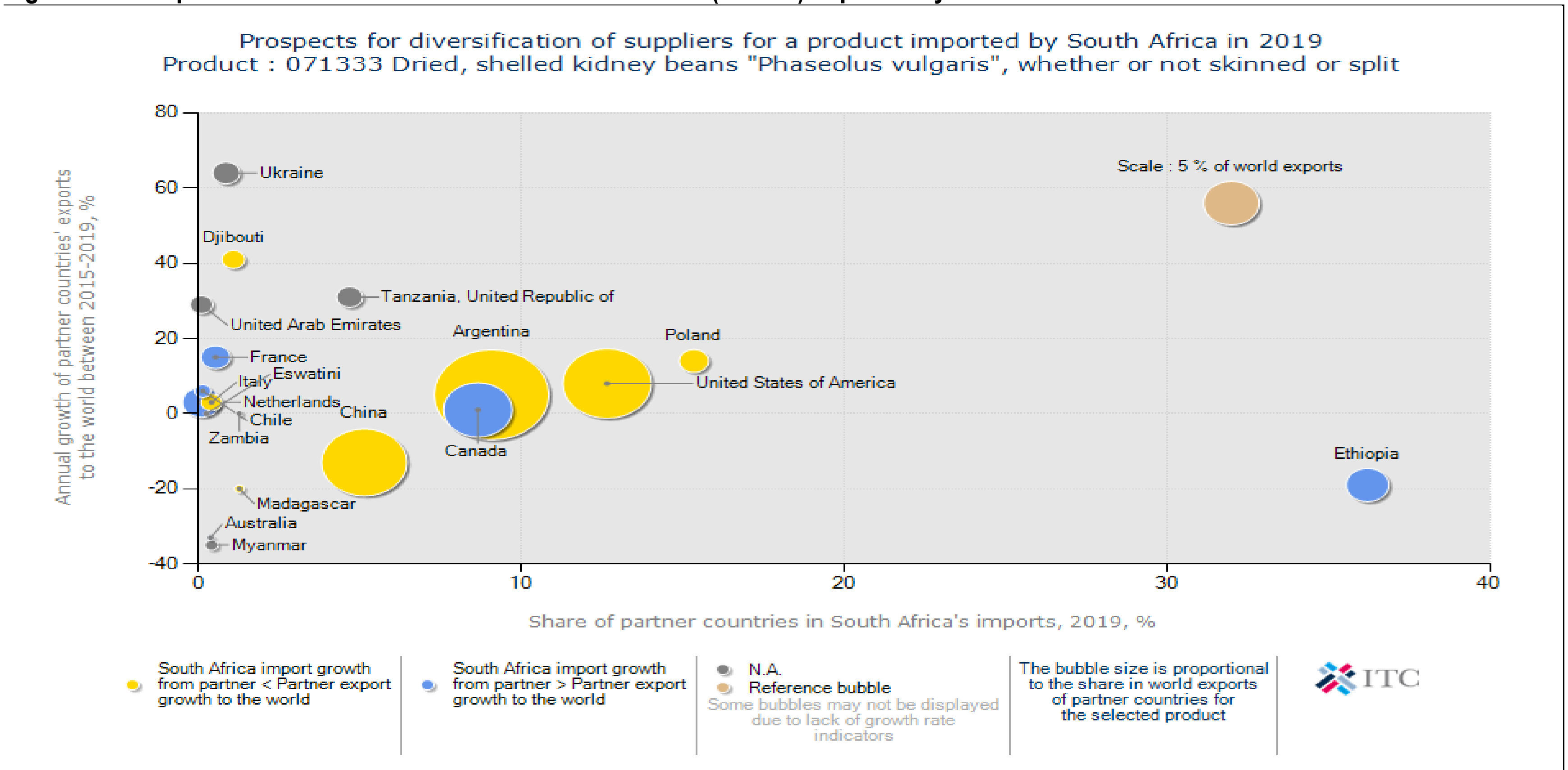
**Table 4: Tariffs applied to South African imports of dried beans**

| TARIFF HEADING | DESCRIPTION | EXTENT OF REBATE | ANNUAL QUOTA TONNAGE |
|---|---|---|---|
| 0713.3 | Dried Beans (*Vigna spp., Phaseolas spp.*), Shelled, whether or not skinned or split. | Full duty less 4.8% | 11 063 |

**Source: Government Gazette Notice 41148 of 2018**

## *4.2 Performance of the South African dry bean industry*

**Figure 12: Prospects for market diversification for dried beans (071333) imported by South Africa in 2019**




**Source: ITC Trade Map**

Figure 12 and Table 5 indicate that China is the biggest exporter of dry beans to South Africa followed by Ethiopia, Canada, Brazil, United States of America and Djibouti. During the year 2019, China accounted for 31.2% of South Africa's total imports of dry beans followed by Ethiopia and Canada with 15.3% and 8.8% respectively. Brazil accounted for about 6.5% of South Africa's total dry beans imports followed by United States of America with 3.2%. Figure 12 further shows that the non-dry bean trading partner countries such as Malawi and Poland experience significant increases with regard to dry beans exports to the rest of the world. This implies that South Africa has an opportunity, if it wishes to diversify its dry beans import base, to import from these countries.

**Table 5: List of supplying markets for dry beans (071333) imported by South Africa in 2019**

| Exporters | Imported value in 2019(thousand US$) | Share in South Africa's imports (%) | Imported quantity in 2019 (tons) | Unit value (US$/ton) | Imported growth in value between 2015 and 2019 (% p.a.) | Imported growth in quantity between 2015 and 2019 (% p.a.) |
|---|---|---|---|---|---|---|
| World | 7027 | 100 | 8773 | 801 | -30 | -32 |
| Ethiopia | 2545 | 36.2 | 4366 | 583 | 2 | -4 |
| Poland | 1079 | 15.4 | 1194 | 904 | -7 | -3 |
| United States of America | 890 | 12.7 | 170 | 5235 | -11 | -28 |
| Argentina | 639 | 9.1 | 767 | 833 | -34 | -35 |
| Canada | 609 | 8.7 | 869 | 701 | 14 | 14 |
| China | 362 | 4.7 | 272 | 1213 | -61 | -68 |
| Tanzania | 330 | 4.7 | 272 | 1213 | 0 | 19 |
| Zambia | 90 | 1.3 | 108 | 833 | 0 | 0 |
| Madagascar | 90 | 1.3 | 120 | 750 | -32 | -27 |

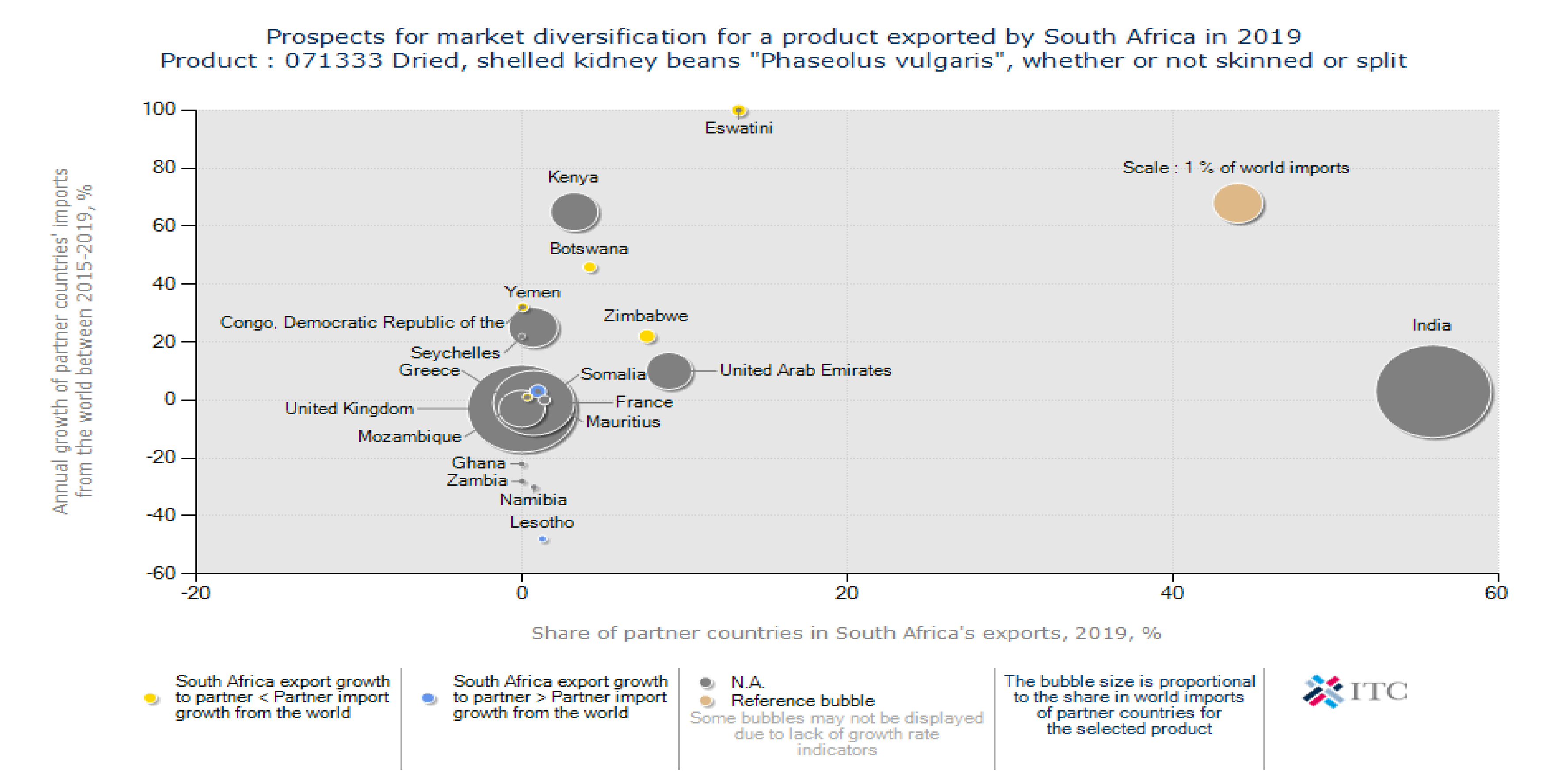
**Source: ITC Trade Map**

Table 6 and Figure 13 show that during 2019, South Africa exported a total of 5147 tons of dried beans to the world. It further indicates that South Africa's dry bean exports to the rest of the world have decreased by 52.5% in value and 48.2% in volume between the years 2018 and 2019. South Africa's dry beans exports during the year 2019 were destined mainly to countries such as Swaziland, United Arab Emirates, India, Portugal and Lesotho, in that order. Most dry beans exports from South Africa in 2018 were destined for the market in Eswatini (38.8 %) followed by United Arab Emirates (22.5 %), (17.1%),Portugal (9.7 %) and Lesotho (3.5%). Figure 13 also indicates that, if South Africa wishes to diversify its dry beans export base the bigger potential markets, which we are currently not supplying, exist in Botswana, Zimbabwe, France, Netherlands, United Kingdom, Italy, Greece and Namibia.

**TABLE 6: South Africa's dry bean (071333) exports in 2019**

| Importers | Exported value in 2019 (thousand US$) | Share in South Africa's exports (%) | Exported quantity in 2019 (tons) | Unit value (US$/ton) | Exported growth in value between 2015 and 2019 (% p.a.) | Exported growth in quantity between 2015 and 2019 (% p.a.) |
|---|---|---|---|---|---|---|
| World | 5771 | 100 | 5599 | 1031 | 37 | 38 |
| India | 3232 | 56 | 3129 | 1033 | 0 | 0 |
| Eswatini | 769 | 13.3 | 814 | 945 | 79 | 71 |
| United Arab Emirates | 522 | 9 | 446 | 1170 | 0 | 0 |
| Zimbabwe | 444 | 7.7 | 559 | 794 | -28 | -25 |
| Botswana | 240 | 4.2 | 224 | 1071 | -17 | -17 |
| Kenya | 186 | 3.2 | 39 | 4769 | 0 | 87 |
| Somalia | 80 | 1.4 | 100 | 800 | 0 | 0 |
| Lesotho | 73 | 1.3 | 65 | 1123 | -27 | -24 |
| Mauritius | 57 | 1 | 50 | 1140 | 222 | 0 |

**Figure 13: Prospects for market diversification for Dry Beans (071333) exported by South Africa in 2019**




**Source: ITC Trade Map**

## 5. ORGANIZATIONAL ANALYSIS

### *5.1 Opportunities and Challenges*

- The demand for South African export beans to the neighbouring African countries is on the increase. Annually South Africa exports on average 25 000 tons of dry beans to these countries.
- There is a short term domestic market potential for the planting of up to 90 000 ha to dry beans in South Africa. During the 2005/06 production season, approximately 60 000 hectares have been planted to dry beans, mainly as a result of low producer prices obtained for maize during the 2005 marketing season. It is therefore possible to expand plantings up to 100 000 hectares to beans in 2007 depending on import volumes that arise mainly from China.
- The demand for canned beans by consumers has started to increase and this provides an opportunity for the industry to expand as well as for new entrants. More and more consumers are beginning to use and prefer canned products on account of the fact that more rural South Africans are adopting Western eating habits and also due to the influx of people to the cities with the resulting preference for convenient and easy-to-prepare foods. More packers have thus begun to enter the canning industry to make the convenient canned product available.
- There are two seed companies, one established by the Dry Bean Producers Organization, known as Dry Bean Seed (Pty) Ltd and one international company Pannar that supplies local producers with Red Speckled varieties established as preferential consumer choices.

## 6. ROLE-PLAYERS IN THE DRY BEAN INDUSTRY

### *6.1. Dry Bean Traders*

| COMPANY | CONTACT PERSON | TEL/CELL | FAX |
|---|---|---|---|
| AB Gani Wholesale Produce<br>PO Box 313<br>CAROLINA, 1185 | Ahmed Gani<br>aagani@telkomsa.net | 017-8431625<br>082 563 8767 | 017-8432521 |
| Advance Grain CC<br>PO Box 414<br>KRUGERSDORP, 1740 | Brian Lever<br>seedjhb@iafrica.com | 011-7625261<br>083 251 5631 | 011-7624111 |
| Africas Own Food<br>PO Box 51<br>VIRGINIA, 9430 | Cecil Groenewald<br>cecil@24-7comm.co.za | 057-2151267<br>082 5511 749 | 057-2151267 (T) |

| COMPANY | CONTACT PERSON | TEL/CELL | FAX |
|---|---|---|---|
| African Foods<br>Posbus 3939<br>WITRIVIER, 1240 | Riaan van der Walt | 082 375 4504 | 013-7515310 |
| African Grain<br>Posbus 2232<br>DELMAS, 2210 | Jaco Jacobs<br>jacojacobs@tiscali.co.za | 013-6654479<br>082 338 1725 | 013-6654476 |
| Akfa Foods<br>PO Box 8278<br>CUMBERWOOD, 3235 | Farhad Abdoola | 033-3873837<br>083 787 8678 | 033-3873837 (T) |
| Bean-Agri Trading Corp of SA<br>P O Box 145869<br>BRACKEN GARDENS, 1452 | Nico Grobelaar<br>njg6@telkomsa.net | 011-8677960<br>082 850 4689 | 011-8677948 (K)<br>***011-9003810 (H)*** |
| Beanex<br>Posbus 26269<br>ARCADIA, 0007 | Claus Coetzee<br>commodities@beans.co.za | 012-3251850<br>082 388 0505 | 012-3235983 |
| Beanutz CC<br>PO Box 563<br>STRATHAVON, 2031 | Lilly Henson | 011-8381325 | 011-8381204 |
| Ben Metter Richter<br>P O Box 16082<br>DOWER GLEN, 1612 | Johan Pheiffer<br>benmet@iafrica.com | 011-4535163<br>083 600 0254 | 011-4540477 |
| Bester Voer & Graanbeurs (Pty) Ltd<br>P O Box 7329<br>STELLENBOSCH, 7599 | Vanessa McKibbin<br>vanessa@bester.co.za | 021-8877188<br>082 413 5631 | 021-8877166 |
| Campo Trading<br>Posnet Suite 158<br>Privaatsak X3<br>PAARDEKRAAL, 1752 | Paul Pretorius<br>campo@hixnet.co.za | 011-9551819<br>083 632 1407 | 011-9553494 |
| Crossbow Industries<br>P O Box 12365<br>JACOBS, 4026 | Alex Zingol<br>alex@crossbow.co.za | 031-4681210<br>083 778 8808 | 031-4681842 |
| Currie's Post International<br>PO Box 1947<br>HILLCREST, 3650 | John Chapman<br>jon@curriespost.co.za | 031-7659500<br>083 300 0647 | 031-7659501 |
| Delmas Saad<br>P O Box 109<br>DELMAS, 2210 | Chris Berrange | 013-6652907<br>082 873 0153 | 013-6652907 |
| Eltrade Africa<br>P O Box 19742<br>TECOMA, 5214 | Mike Cradock<br>mikec@eltrade.co.za | 043-7260865<br>083 458 5657 | 043-7269230 |
| Euro-Africa (Pty) Ltd<br>71 Iris Road | Bradley Lever<br>blever@iafrica.com | 011-7625261<br>082 441 8105 | 011-4831977 |

| COMPANY | CONTACT PERSON | TEL/CELL | FAX |
|---|---|---|---|
| NORWOOD, 2192 | | | |
| F R Waring International<br>P O Box 681<br>PARKLANDS, 2121 | Piers Sanford<br>psanford@frwaring.co.za | 012-6668135<br>082 888 1869 | 011-3257192 |
| Golden Dice Foods<br>P O Box 1453<br>NIGEL, 1490 | Johan Wehmeyer<br>gdf@mweb.co.za | 011-8141850 | 011-8141458 |
| Goldkeys Prepacks<br>P O Box 185<br>DURBAN, 4000 | Abdulla Ally<br>abdulla@goldkeys.co.za | 031-3377648<br>082 801 9178 | 031-3686695 |
| Harvesters<br>P O Box 903<br>RIVONIA, 2128 | Alistair Wheatley<br>alistair@harvesters.co.za | 011-4945170<br>083 643 3222 | 011-4945257 |
| J F R Marketing<br>P O Box 70334<br>DIE WILGERS, 0041 | Koos Ras<br>preciosa@global.co.za | 012-8070741<br>082 448 0575 | 012-807 1459 |
| JLR International Services<br>P O Box 29120<br>MAYDON WHARF, 4057 | Lourens Retief<br>Harry Konst<br>services@jlr.co.za | 031-2055441<br>082 440 5069 | 031-2051501 |
| Josh Levy<br>P O Box 120<br>POTCHEFSTROOM, 5220 | Abdul Cassim<br>Prakash Kalanjee<br>prakash@joshlevy.co.za | 018-2934300<br>082 891 6042 | 018-2948767 |
| Tiger Food Brands<br>P O Box 12<br>MAITLAND, 7405 | Ivor Lamont<br>ivor.lamont@tigerbrands.com<br>Rickes v Tonder (Best) | 021-5066366 | 021-5117286 |
| Kapitans Packaging<br>P O Box 16131<br>GELVANDALE, 6016 | Keith Forgan | 041-4564066 | 041-9911457 |
| Kimberley Grain Commodities (Pty) Ltd<br>P O Box 562<br>KIMBERLEY, 8300 | Hennie Engelbrecht<br>kbygrain@mweb.co.za | 053-8314770<br>082 377 2417 | 053-8318606 |
| Klein Karoo Koöperasie<br>Klein Karoo Saad<br>Posbus 241<br>OUDTSHOORN, 6620 | David Malan<br>Riaan v/d Westhuizen<br>kleinkaroo.saad@mweb.co.za | 044-2035259 | 044-2791782 |
| L Cohen & Co<br>P O Box 251<br>NIGEL, 1490 | Jan Le<br>Hman | 011-8143052 | 011-8143052 (T) |
| L H C Voere<br>P O Box 12509<br>ONDERSTEPOORT, 0110 | Mev L Moore | 012-5612530/2<br>082 950 3826 | 012-5612532 |
| MYN Trading Enterprises | Mubeen Noorbhai | 011-8521871 | 011-8524803 |

| COMPANY | CONTACT PERSON | TEL/CELL | FAX |
|---|---|---|---|
| PO Box 10400<br>LENASIA, 1820 | myntrading@telkomsa.net | 083 327 3927 | |
| Natal Dry Beans<br>P O Box 540<br>PIETERMARITZBURG, 3200 | Ahmed Abdoola<br>***PO Luxmi, 3207*** | 033-3871594/5/6<br>083 786 2929 | 033-3876772 |
| NWK Beperk<br>Posbus 107<br>LICHTENBURG, 2746 | Kobus v/d Berg<br>kvdberg@nwk.co.za | 018-6331017 | 018-6331902 |
| Olam Foods<br>Posbus 52008<br>Berea Road<br>BEREA, 4000 | Michael Schmidt / Marco<br>michael@olam.co.za<br>marco@olam.co.za | 031-3121566<br>082 330 9743 | 031-3038540 |
| Pakco<br>P O Box 65<br>VERULAM, 4340 | Sham Naidu<br>shamn@pakco.co.za | 032-5331050<br>083 500 3368 | 032-5332681 |
| Pioneer Foods / Sasko<br>Posbus 24<br>MALMESBURY, 7300 | Abé van Niekerk<br>avannie2@pioneerfoods.co.za | 022-4827237<br>083 628 7877 | 022-4872815 |
| Popking<br>Posbus 41<br>HOPETOWN, 8750 | Madelein Lamley<br>info@biggi.co.za | 053-2030403 | 053-2030482 |
| Pioneer Foods<br>PO Box 24<br>MALMESBURY, 7300 | AG van Niekerk<br>avannie2@pioneerfoods.co.za | 022-4827237<br>083 628 7877 | 022-4872815 |
| Pioneer Foods<br>PO Box 9149<br>HUGUENOT, 7645 | Elizabeth Mac Gregor<br>(Voedseltegnoloog) | 021-8075841<br>083 452 9524 | |
| Pride Milling<br>Posbus 459<br>LESLIE, 2265 | Henriette Wentzel<br>hwentzel@pridemilling.co.za | 017-6830050<br>082 449 0062 | 017-6830051 |
| Progress Milling<br>P O Box 386<br>PIETERSBURG, 0700 | Eric Platt<br>platte@iafrica.com | 015B2973452<br>083 654 5991 | 015B2974835 |
| Renaissance Commodity Holdings (Pty) Ltd<br>Posbus 13413<br>SINOVILLE, 0129 | Paul Couzyn<br>chrstlg@rencomhol.com | 012-3251853/4<br>082 821 1295 | 012-3261223 |
| Retradco (Trademore)<br>P O Box 95474<br>GRANT PARK, 2051 | Ben Brasq<br>retradco@iafrica.com | 011-7282729<br>072 236 3596 | 011-7838188 |
| Rhino Props<br>Posbus 1473<br>LICHTENBURG, 2740 | Johan Slabbert<br>rhinoprops@xsinet.co.za | 018-632 0990<br>082 805 9362 | 018-632 0989 |

| COMPANY | CONTACT PERSON | TEL/CELL | FAX |
|---|---|---|---|
| Riverwalk Seed & Grain<br>PO Box 3218<br>PAARL, 7620 | Grant Lyons<br>grant@exinet.co.za | 021-8729849<br>082 924 3304 | 021-8725936 |
| Roodedraai Wholesalers CC<br>P O Box 110<br>PERDEKOP, 2465 | B Chothia<br>rwptyltd@mweg.com | 017-7851006 | 017-7851306 |
| S & K Packaging<br>P O Box 37<br>LESLIE, 2265 | Mr Sandler<br>Manny Kagan<br>danmalt@netactive.co.za | 017-6830256 | 017-6830086 |
| Solpak Distributors<br>P O Box 10930<br>PORT SHEPSTONE, 4240 | I Moosa<br>solpak@saol.com | 039-682 4048 | 039-682 2068 |
| Surplus Grain Traders<br>P O Box 86153<br>CITY DEEP, 2049 | Johan Nel<br>xinxan@iafrica.com | 011-613 5955 | 011-613 5957 |
| Tiger Food Brands<br>Posbus 12<br>MAITLAND, 7405 | Rikus van Tonder<br>rikus.v.tonder@tigerbrands.com | 021-5066337<br>082 561 9827 | 021-5117286 |
| Transvaal Grain Enterprizes<br>P O Box 60705<br>PHOENIX, 4068 | Mohammed Vally | 031-5008889<br>083 455 7864 | 031-5006668 |
| Triotrade<br>P O Box 39561<br>MORELETTAPARK, 0044 | Hannes Koen<br><br>Wessel Higgs | 012-8039336/8<br>083 627 2601<br>082 887 6704 | 012-8039337 |
| Tswana Meule (Brennco)<br>P O Box 1425<br>HAMMANSKRAAL, 0400 | Koos Odendaal<br>prepack@mweb.co.za | 7110478 (Tswana)<br>7110057 (Brennco)<br>082 920 0283 | 012-711 0477 |
| Umgeni Products<br>P O Box 1615<br>BALLITO, 4420 | Seelan Nair / André Swarts<br>seelan@umgeni.com<br>andre@umgeni.com | 032-9472261<br>083 625 8216<br>083 626 1400 | 032-9472281/78 |
| Valbros<br>PO Box 932<br>LYDENBURG, 1120 | Vally (Jnr)<br><br>Vally (Snr) | 013-2351258<br>0132354910<br>082 786 1258 | 013-2351258 |
| Van's Prepacker<br>P O Box 12<br>ARNOT, 1051 | Charles van Wyk<br>ajdfarms@lantic.co.za | 013-2462244<br>082 388 3058 | 013-2462244 |
| Viking Holding Pty) Ltd<br>24c High Str<br>WATERKLOOF, 0181 | Robin Feldsman | 012-3467496 | 012-3467287 |

## 6.2. *Dry Bean Packers*

| COMPANY | CONTACT PERSON | TEL/CELL | FAX |
|---|---|---|---|
| Akhalwaya's Spice Products<br>84 Bree Street<br>NEW TOWN, 2001 | | 011-8364864 | |
| Anglo American Farms<br>P O GROOT DRAKENSTEIN, 7680 | Con Costaras<br>hillb@rfffoods.com | 021-8704000 | 021-8741445 |
| Da Wehna | Mr Liberty | 082 418 3693 | |
| Giants Canning<br>Private Bag X2007<br>LOUIS TRICHARDT, 0929 | Chantel Guruviah | 011-6232929<br>082 927 7501 | 011-6232986 |
| Gibson Foods<br>PO Box 731115<br>FAIRLANDS, 2030 | Henry Gibson | 011-4762205<br>082 376 0464 | 011-6787228 |
| Kausies Kitchen<br>P O Box 6<br>DESAINAGAR, 4405 | Dayalan Naidoo | 032 - 9444114 | 032-9443198 |
| Marine Products<br>P O Box 203<br>VELDDRIF, 7365 | Chris Geldenhuys | 022-7831103 | 022-7830125 |
| Narian Singh & Sons (Kama)<br>181 Mahatma Ghandi Street<br>KWA DUBUZA, 4450 | | 032-5511191 | |
| Nelstad Investments (Pty) Ltd (Just Beans)<br>PO Box 47185<br>GREYVILLE, 4023 | | | |
| New Look Packers<br>PO Box 405<br>ROODEPOORT, 1725 | | 011-7635696 | |
| Olympic Trading<br>3 Smithers Road<br>STANGER, 4450 | | 0324-22261 | |
| Pakco Food Division<br>P O Box 65<br>VERULAM, 3430 | Christopher Perumal | 032 - 5331050 | 032-5330724 |
| RFF Foods (Pty)Ltd<br>Agricultural Department<br>P O GROOT DRAKENSTEIN, 7680 | Willem McAlpine | 021-8704190<br>082 784 5870 | 021-8741370 |
| RFF Foods (Pty)Ltd<br>National Sales & Marketing Manager | Gerhard Kotze<br>kotzeg@rfffoods.com | 021-8704110 / 4130 | 021-8741445 |

| COMPANY | CONTACT PERSON | TEL/CELL | FAX |
|---|---|---|---|
| P O GROOT DRAKENSTEIN, 7680 | Santa Kotze | 082 920 3773 | |
| Rupa's Food Packaging<br>66A Bree Street<br>NEW TOWN, 2001 | | 011-8360391 | |
| SA Fruit & Veg Canners Ass<br>P O Box 6175<br>Main Street Post Office<br>PAARL, 7622 | Terry Melone<br>safvpa@mweb.co.za | 021B8711308 | 021-8725930 |
| Savemor Products (Pty) Ltd<br>5 Butts Road<br>PINETOWN, 3610 | | | |
| St Helena Bay Fishing Industry<br>P O Box 1<br>STOMPNEUS BAY, 7382 | Henk Hurter | 022-7421611 | 022-7421848 |
| Sugarbird<br>P O Box 70<br>MALMESBURY, 7300 | Mr. A du Toit | 022-4821144 | 022-4824154 |
| Tiger Food Brands<br>P O Box 259<br>MARBLE HALL, 0450 | Kobus Pieterse<br>kobus.pieterse@tigerbrands.com | 013-2612145<br>082 555 7948 | 013-2612710 |
| Tiger Foods Brands<br>Posbus 627<br>SUIDER-PAARL, 7624 | Pieter Grobler | 021B8601020 | 021-9704111 |
| Werda Produkte<br>Posbus 335<br>BONNIEVALE, 6730 | Johan Wolfaardt<br>jwolfaardt@sadgroup.co.za | 023-6162140<br>082 414 4796 | 023-6162194 |

**LABELLING**

| COMPANY | CONTACT PERSON | TEL/CELL | FAX |
|---|---|---|---|
| Tag & Label SA<br>Posbus 679<br>FERNDALE, 2160 | Jack Vorster | 011B7967925<br>082 851 4077 | 0117931281 |

## 7. ACKNOWLEDGEMENTS

**The following organizations are acknowledged:**

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**Statistics and Economic Analysis: Department of Agriculture, Forestry & Fisheries.**
Tel: (012) 319 8453
Fax: (012) 319 8031
www.daff.gov.za

**Quantec Easydata**
www.quantec.co.za

**ITC Market Access Map**
www.macmap.org.za

**ITC Trade Map**
www.trademap.org

**Food Pricing Monitoring Committee Report (2003)**