



SOCIAL (ETHICAL) MONITORING & EVALUATION REPORT

Quarterly Update for Q4 2024/2025

1 January – 31 March 2025

In cooperation with the Western Cape Department of Agriculture



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INTRODUCTION

The Sustainability Initiative of South Africa (SIZA) continues to play a vital role in shaping a more ethical, responsible, and environmentally sustainable future for the South African agricultural sector. As a multi-stakeholder, user-driven programme, SIZA offers a robust platform that supports continuous improvement across a diverse agricultural landscape, spanning over 40 commodities and all nine provinces.

Rooted in a vision to position South African agriculture as a global leader in sustainable and ethical trade, SIZA goes beyond compliance, promoting continuous improvement practices that exceed the minimum legal requirements. Since its inception by the fruit industry in 2008 and its transition to an independent, self-sustaining entity in 2016, SIZA has remained steadfast in its commitment to transparent governance, representation, and strategic responsiveness to industry needs by avoiding duplication and promoting a cost-effective approach.

This quarterly report reflects the SIZA programme's ongoing work and evolving impact. It provides key insights into membership trends, audit outcomes, risk assessments, and environmental stewardship efforts. By highlighting both achievements and areas of concern, the report empowers stakeholders to make informed decisions, address risk factors proactively, and invest in capacity-building initiatives that coordinate a culture of continuous improvement.

SIZA's dedication to sustainable progress is rooted in collaboration, accountability, and shared responsibility—principles that ensure long-term value for producers, buyers, and the broader agricultural community in South Africa.

The SIZA M&E reports are derived from the four quarterly periods as specified by the Western Cape Department of Agriculture, which are:

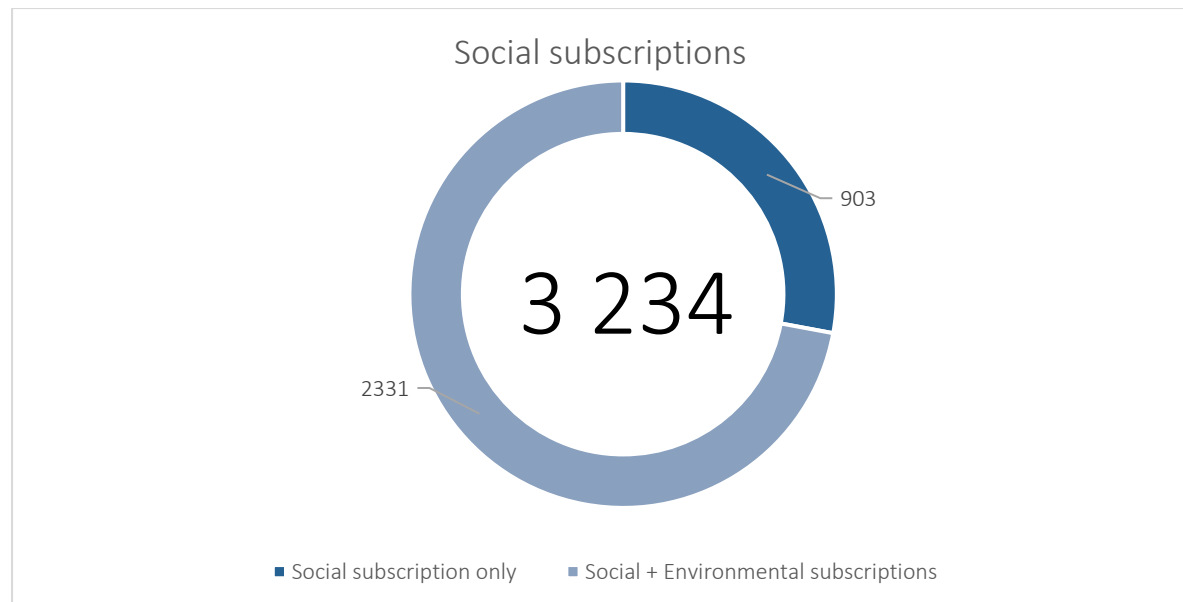
- Quarter 1: 1 April - 30 June
- Quarter 2: 1 July - 30 September
- Quarter 3: 1 October - 31 December
- Quarter 4: 1 January - 31 March

1. SIZA SOCIAL (ETHICAL) SUBSCRIPTIONS

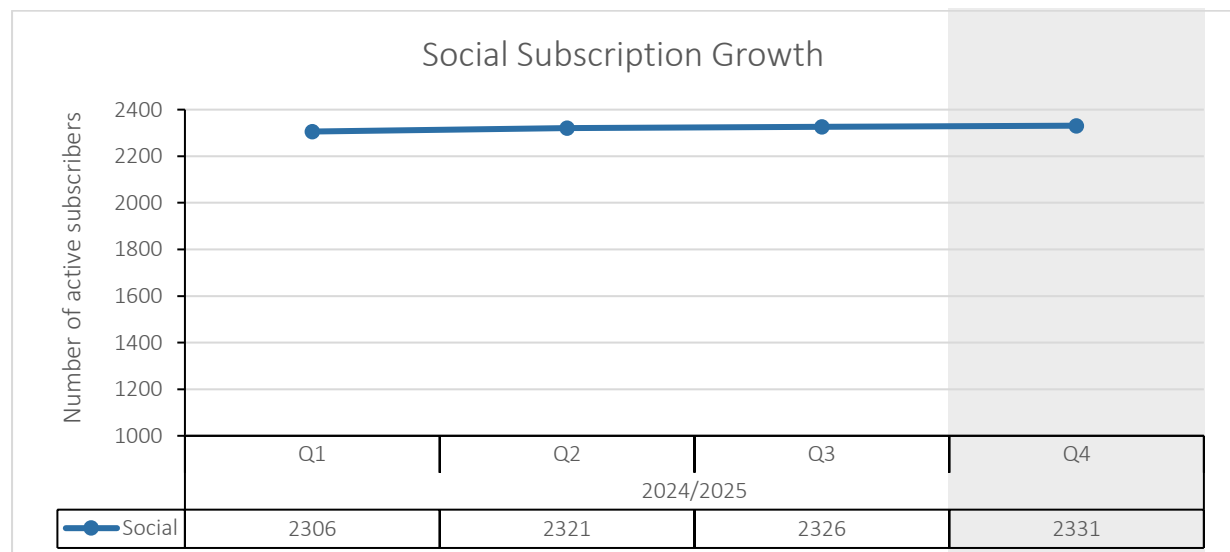
1.1. SIZA Subscription Breakdown

1.1.1. Active Primary Subscribers (Suppliers)

Currently, there are 3 234 active primary subscriptions/profiles registered on the MySIZA platform for the SIZA Social module. Of these, 2 331 subscriptions are also registered for the SIZA Environmental module.



Subscriptions for the SIZA Social module have been slowly increasing over the past several years, most of the quarters still reflect a positive growth or stable Social subscriptions. A total of 5 new primary subscriptions were registered for SIZA Social between 1 January - 31 March 2025. Even though the number of subscriptions has continued to increase, it is important to know that there are fluctuations in subscriptions due to subscriptions cancelling their profiles or combining into multisites as well as new sites joining the programme, although the total amount of hectares likely remains the same.

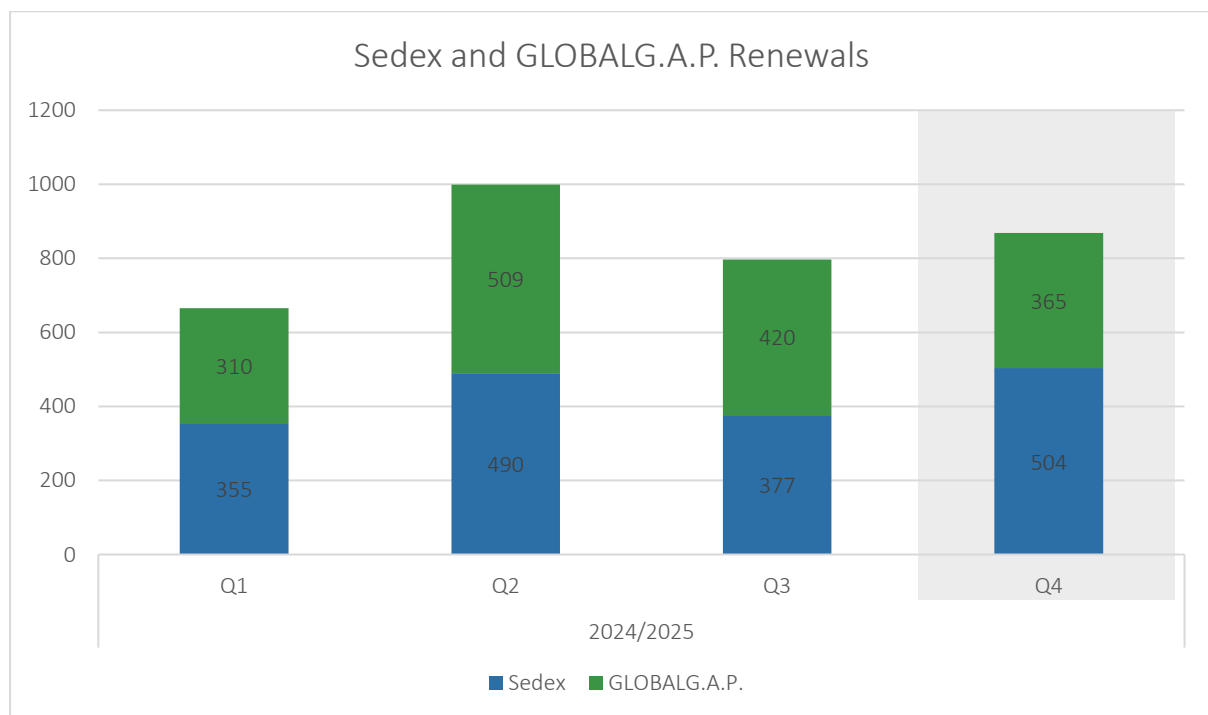


1.1.2. Sedex and GLOBALG.A.P. registrations

The SIZA vision to supply a cost-effective approach, supports the partnerships with other technical platforms to ensure that there is visibility and traceability along the supply chain without duplication. Some buyers prefer to work on global platforms where they have access to all their suppliers around the globe, as they source from multiple countries and not only South Africa. Therefore, for SIZA to gain and maintain acceptance, producers only need to undergo one audit per compliance category. SIZA offers a cost-effective user pay option to capture and transfer data on behalf of producers to Sedex and GLOBALG.A.P.

The chart below shows the number of subscriptions whose profile SIZA keep up to date on Sedex and for whom we provide visibility via an API link on the GLOBALG.A.P. platform for their Social and Environmental audit data. The fluctuation per quarter, similar to account renewals, can be attributed to the fruit seasons, fluctuation in subscription renewals, and the trend over the last couple of years where we have larger multi-sites instead of more single sites.

In total, there are 1 762 SIZA subscribers registered for Sedex visibility, 1 428 SIZA subscribers registered for Social audit visibility on GLOBAL.G.A.P. and 897 for Environmental audit visibility on GLOBAL.G.A.P as well as 1 374 profile subscribed to the SIZA Environmental module with Sedex visibility.



1.1.3. Active primary subscription by level

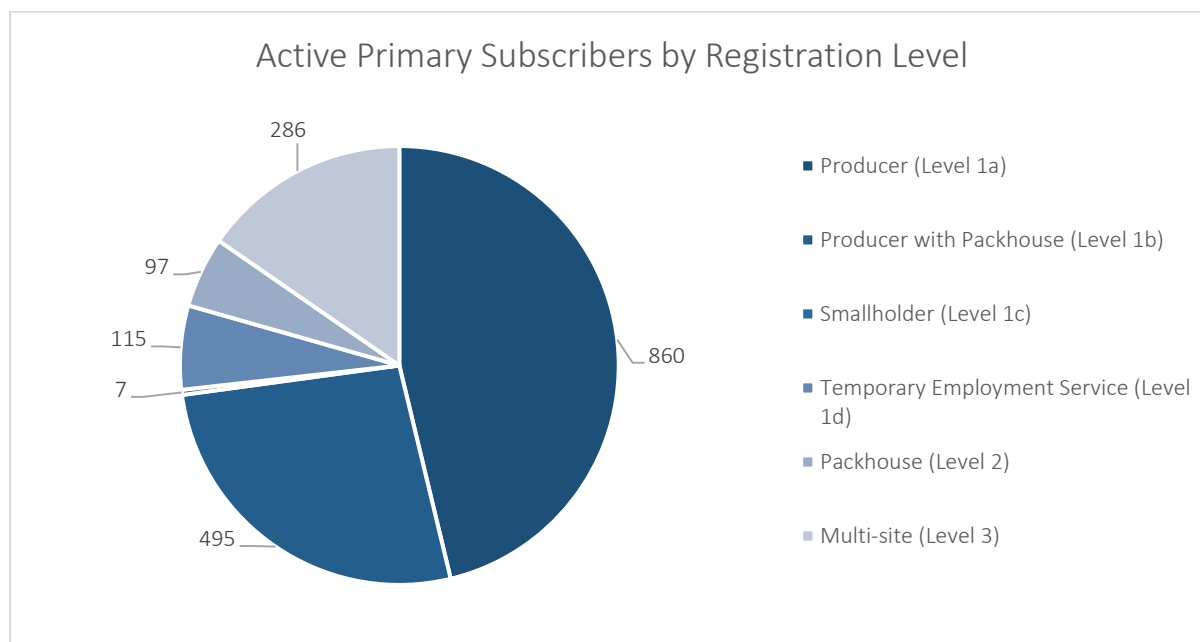
SIZA subscriptions are structured into different levels to ensure that different functionalities can be allocated to the different levels of subscriptions and to ensure that sites can be registered on the level that explains their operations the best. SIZA does not only cater for producers, but also for packhouses and processing facilities. Secondary subscriptions, such as buyers, (Levels 4 – 6) can be linked to primary subscriptions/suppliers (Levels 1 – 3) who supply to them to ensure a transparent value chain. This also ensures confidentiality and the protection of data.

Definitions as indicated below are the same for the Social (Ethical) and Environmental modules because they are two separate standards/modules.

Level 1a:	Producer A single production site.
Level 1b:	Producer/Packhouse/Processing Facility A single production site including a packing/processing facility on site, packing/processing their own product.
Level 1c:	Smallholders/Emerging Growers Producers who need to become compliant and have never undergone an audit who form part of the SIZA Emerging Growers Compliance Programme over a 3-year period.
Level 1d:	Temporary Employment Services (Labour Brokers) A person or company that provides labourers to client companies on a temporary basis.
Level 2:	Packhouse/processing facility An independent packhouse/processing facility which packs/processes on behalf of primary producers.
Level 3b:	Multisites/Packhouses/Processing Facilities The multisite principle is applied where the organisation and multiple sites are registered as <u>one legal entity</u> and have one management system that is centrally controlled at a head office base.
Level 4a:	Export agent Export companies exporting products from South Africa to other countries.
Level 4b:	Import Agent Import companies importing products from South Africa.
Level 5a:	Retailer Retailers purchasing products from South African suppliers.
Level 5b:	Minor Industry Association Industry representing under 5 000 hectares.
Level 5c:	Major Industry Association Industry representing above 5 000 hectares.
Level 5d:	Major Industry Association Secondary subscribers who require visibility on primary producers/packhouses audit data.
Level 6:	Not-for-Profit organisation An organisation that does not need to be linked to Level 1-3 sites. For example, NGO, trade union, or other non-profit entity not requiring visibility of Level 1-3 sites.
Level 7a:	Social (Ethical) Audit Firms
Level 7b:	Environmental Audit Firms
Level 7c:	Independent Greenhouse Gas Specialists A company that specialises in calculating a site's carbon footprint within the agricultural sector.
Level 8:	Training Service Providers/Consultants/Remedy Programmes Companies who are recognised by SIZA and who need to be visible as recommended programmes to the producers.

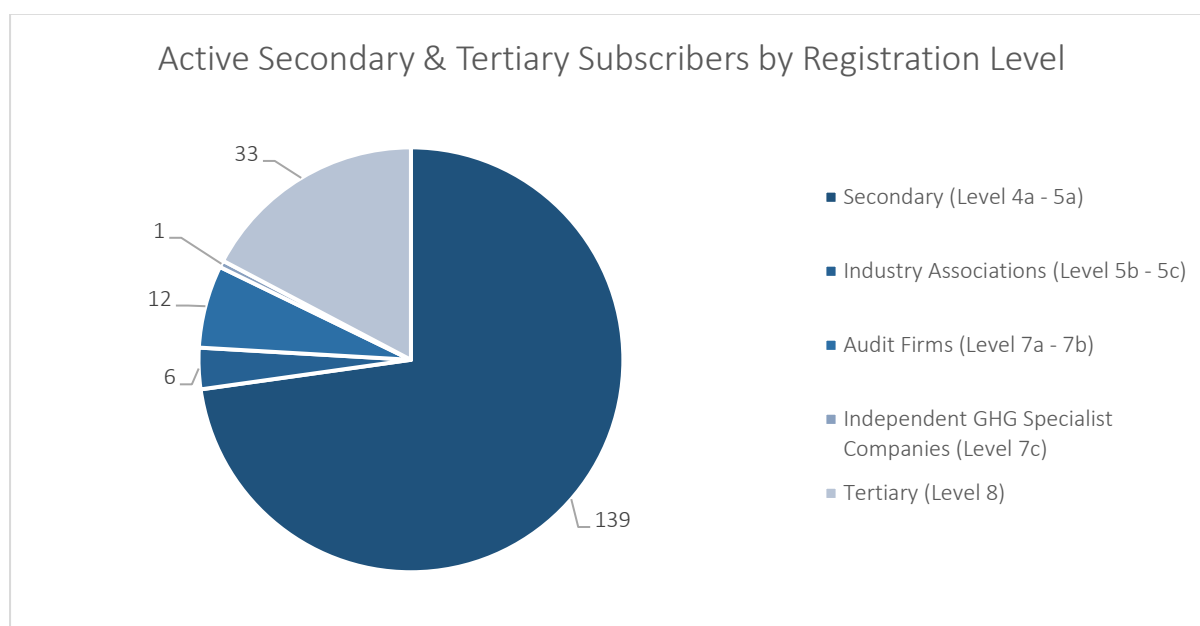
1.1.4. Active primary subscriptions

Most active subscribers to the *MySIZA* platform are primary subscribers as displayed in the below graph. Level 1a producers constitute the largest portion of all active primary subscriptions (46,24%), followed by level 1b producers (26,61%), and then multisites (15,38%).



1.1.5. Active secondary and tertiary subscriptions

The *MySIZA* platform acts as a risk management tool for both the producer and the buyer, as secondary subscription holders (exporters, importers, and retailers) can manage risk within their supply chain by having visibility on the performance of their linked SIZA subscriptions. Currently, there are a total of 145 secondary subscriptions and 46 tertiary subscriptions (audit firms, consultants & remedy providers) registered on *MySIZA*. SIZA also shares data on both the Sedex and GLOBALG.A.P. platforms, leading to various buyer linkages via these two global platforms. SIZA also shares data with both the Sedex and GLOBALG.A.P. platforms, leading to various buyer linkages being made via these two global platforms.

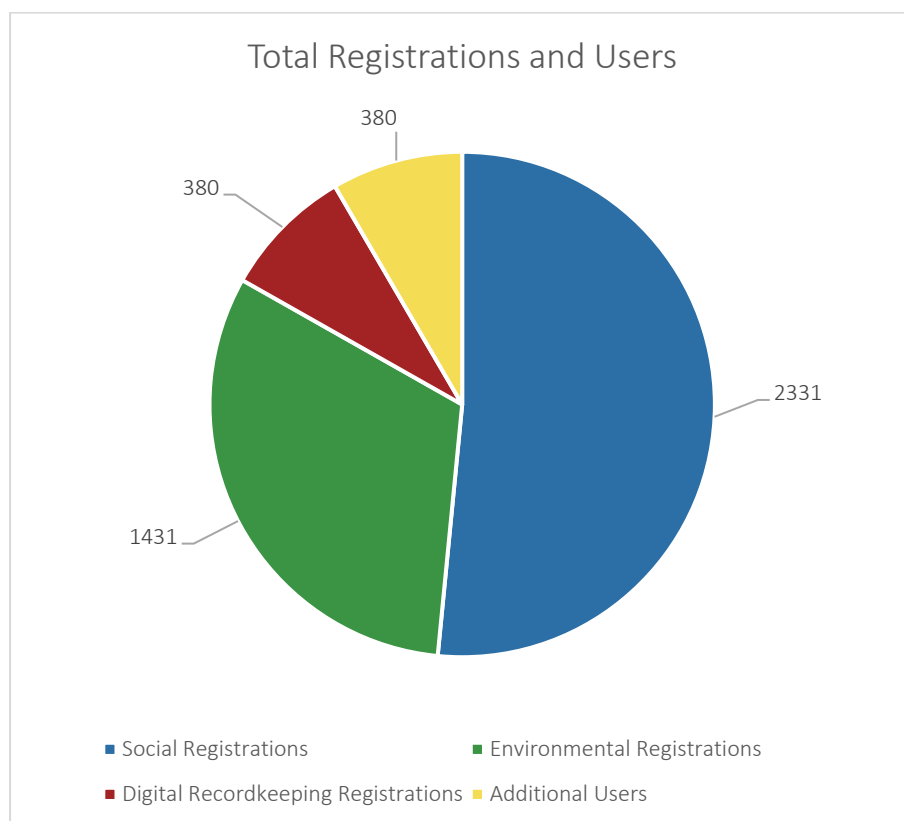


1.1.6. Total MySIZA registration and users

In support of SIZA's diverse subscriptions to accommodate the value change, several other users are also registered on the MySIZA platform accumulating to the subscription total. These consist of 76 audit personnel, 145 secondary subscribers (including buyers such as exporters, importers, and retailers), 46 tertiary subscribers (including consultants and remedy solution programmes), six environmental verification users, three GHG Specialist users, and 99 secondary contacts (additional compliance personnel who are added on primary profiles) which adds up to a larger total of active users on the MySIZA platform. This brings the total to 380 additional users on the MySIZA platform.

Module Registrations

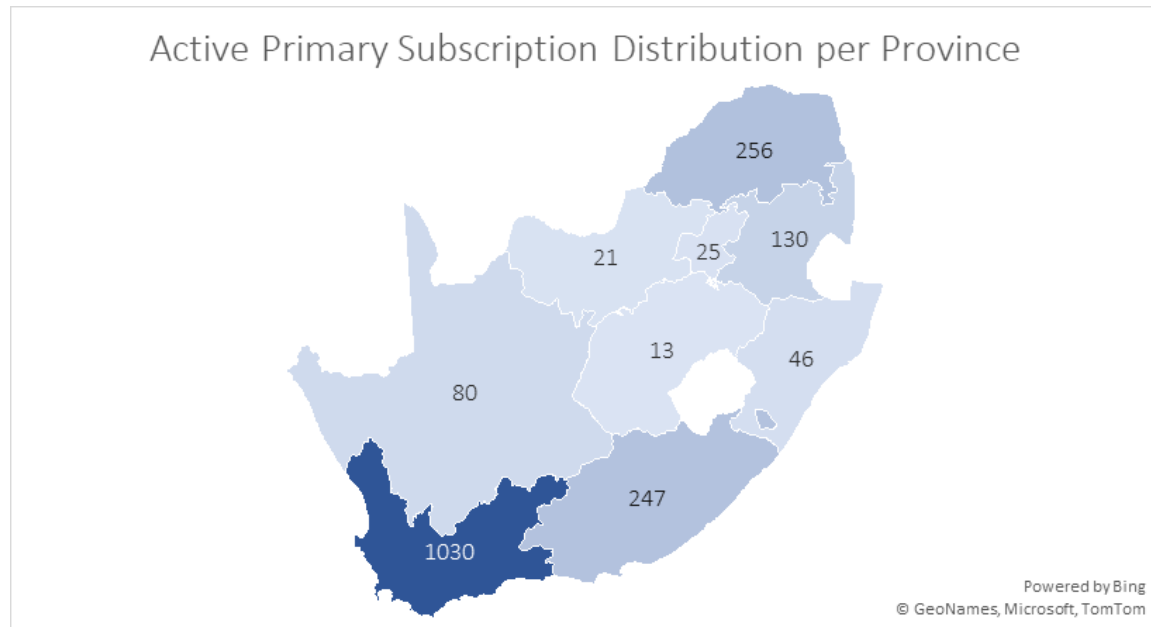
Remember, one user can be linked to both the Social and Environmental modules, as well as Digital Recordkeeping, therefore, to calculate the total module registrations and users, the 380 additional user profiles should be added to the total subscriptions of module registrations, which includes 2 331 Social registrations, 1 431 Environmental registrations, and 380 Digital Recordkeeping registrations. This brings the total registrations in terms of subscriptions to **4 522 users.**



= 4 522 total users and registrations

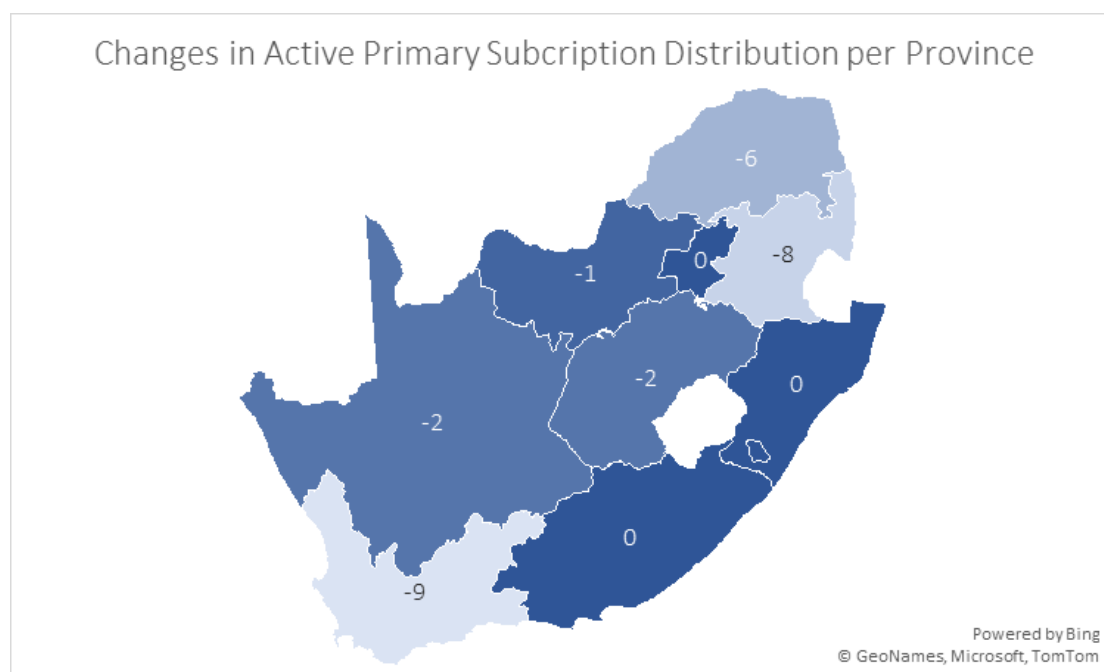
1.1.7. Distribution of active primary subscriptions

With the Western Cape being known for providing production stability to fruit production and being one of South Africa's most important provinces for the export of fruit products, the Western Cape records the highest SIZA subscriptions across the nine provinces. Currently, the Western Cape is home to 1 030 Primary Social profiles, followed by Limpopo (256) and the Eastern Cape (247).

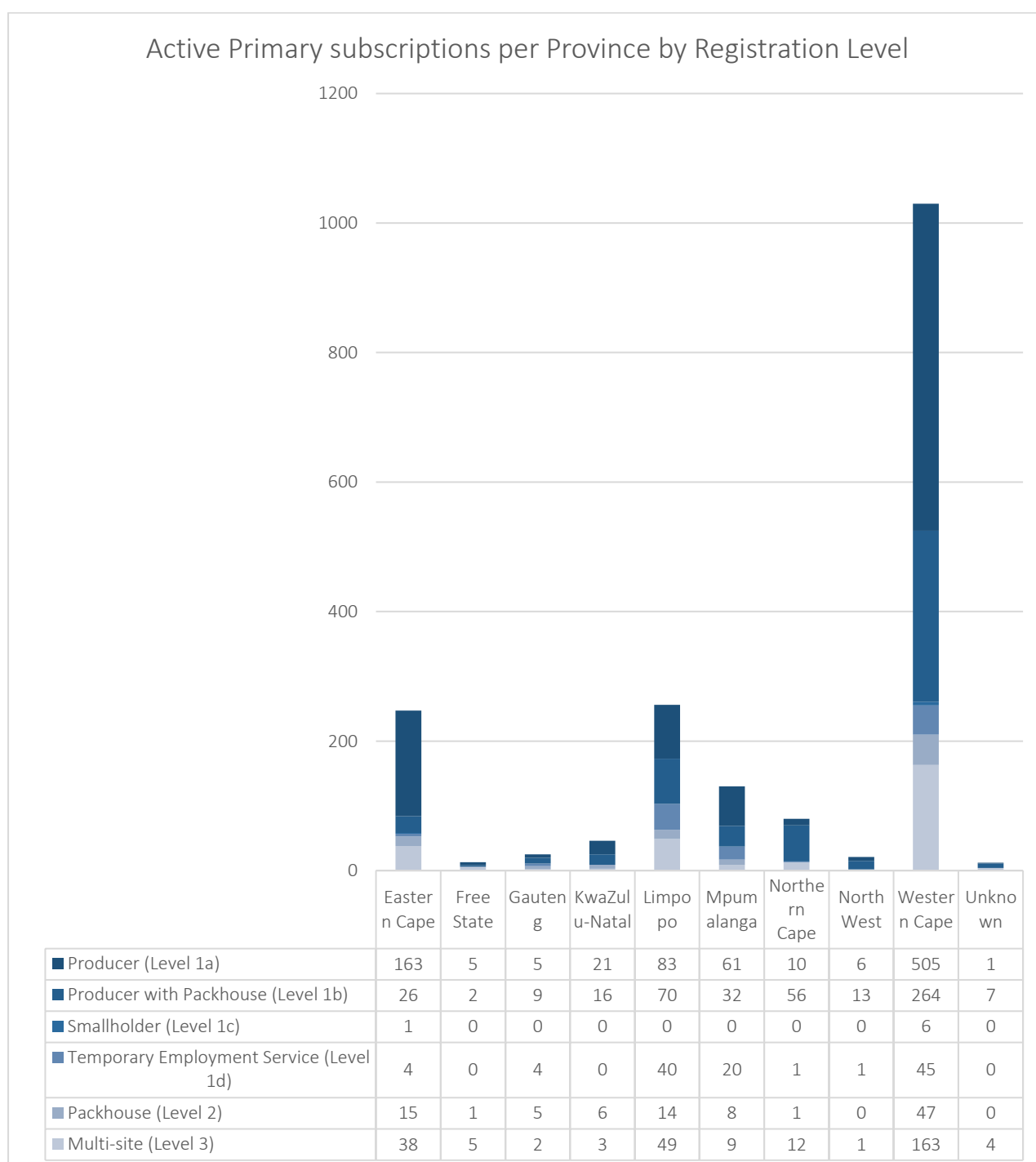


1.1.8. Changes in active primary subscription distribution per province

When comparing the primary subscription distribution per province for Q3 2024/2025 and Q4 2024/2025, it is noted that in almost all Provinces the subscriptions decreased. This is largely due to the challenges that are experienced, which have the effect that the majority of sites form part of a larger multi-site, and therefore, although the hectares of farming production remain the same, the number of profiles might decrease.



1.1.9. Active primary subscription by level



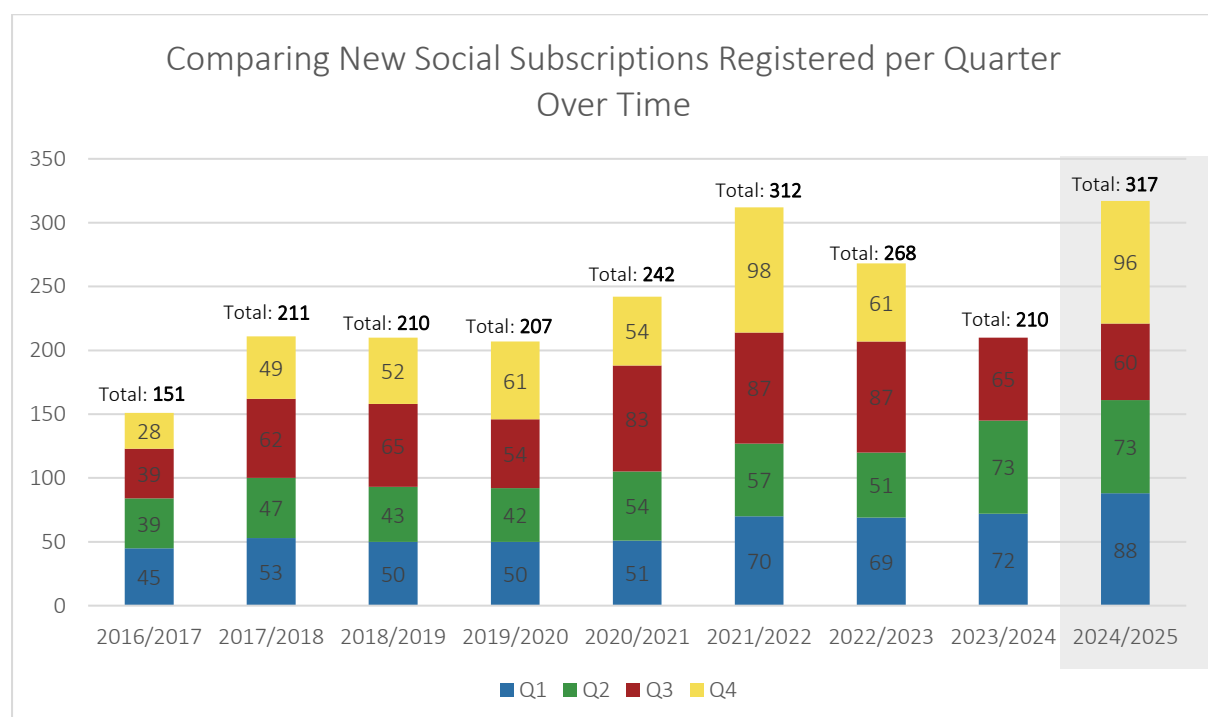
Producer (level 1a) subscriptions continue to make up the largest percentage of subscriptions – the producer (level 1a) subscriptions in the Western Cape currently represent 58,72% of all level 1a subscriptions. Since fruit producers have the biggest representation on the *MySIZA* platform, out of the total registrations for primary subscriptions, 1 030 subscriptions are based in the Western Cape. Furthermore, at the national scale, level 1a subscriptions continue to make up the largest percentage of subscriptions and currently represent 55,38% of all primary subscriptions.

1.2. New Subscribers and Renewals

As SIZA is a multi-sector agricultural solution, the ongoing aim is to have all production units within South Africa to be registered for SIZA Social and/or SIZA Environmental as a drive towards being a global leader in ethical trade and environmental sustainability. This section indicates a stable and steady growth in subscriptions since 2016. One of the reasons for this growth can refer to the fact that SIZA expanded its practices to become a multisector, agri-wide compliance programme.

1.2.1. Comparing new Social (Ethical) subscribers registered per quarter over time

Since 2016, a total of 2 067 new subscriptions registered for the SIZA Social module, while 96 new subscribers registered during the current reporting quarter. For the 2024/2025 period, a total of 317 new subscribers have registered. The graph below indicates that there has been steady growth in subscriptions since 2016 that doesn't seem to be slowing down, which will have a positive effect on ethical compliance throughout South Africa.



1.3. Subscriptions per Commodity

As SIZA is a multi-sector agricultural solution, the *MySIZA* platform allows for a very detailed breakdown of commodities. SIZA Social subscriptions have contributed to indicate their various commodities on their SAQ. As can be seen in the table below, we have categorised the various commodities and varieties with each commodity's total. The four most prevalent commodities in the Western Cape are Pome- and Stone Fruit (601 and 769 sites with each respective commodity), Citrus (599 sites with citrus commodities) and Table Grapes (224 sites with Table Grape commodities).

Commodity	All South Africa		Western Cape	
	Number of commodity represented in SIZA subscriptions	% of total commodities indicated	Number of commodity represented in SIZA subscription	% of total commodities indicated
Kumquats	2	0,04%	0	0,00%
Limes	33	0,63%	17	0,54%
Lemons	520	9,86%	182	5,78%
Pomelo	111	2,11%	8	0,25%
Grapefruit	58	1,10%	2	0,06%
Soft citrus	588	11,15%	271	8,60%
Oranges	417	7,91%	119	3,78%
Other Citrus	21	0,40%	11	0,35%
Total Citrus	1750	33,19%	610	19,37%
Apricots	132	2,50%	127	4,03%
Cherries	31	0,59%	16	0,51%
Nectarines	2	0,04%	1	0,03%
Nectarines	157	2,98%	149	4,73%
Peaches	221	4,19%	215	6,83%
Plums	265	5,03%	257	8,16%
Pluots	1	0,02%	1	0,03%
Prunes	10	0,19%	9	0,29%
Total Stone Fruit	819	15,53%	775	24,60%
Apples	299	5,67%	259	8,22%
Pears	377	7,15%	346	10,98%
Quince	1	0,02%	1	0,03%
Other	2	0,04%	2	0,06%
Total Pome Fruit	679	12,88%	608	19,30%
Total Table Grapes	331	6,28%	229	7,27%
Distilled Spirits	1	0,02%	1	0,03%
Wine Grapes	192	3,64%	189	6,00%
Wine grapes (Red)	67	1,27%	67	2,13%
Wine Grapes (White)	70	1,33%	70	2,22%
Total Wine Grapes	329	6,24%	326	10,35%

	All South Africa		Western Cape	
Commodity	Number of commodity represented in SIZA subscriptions	% of total commodities indicated	Number of commodity represented in SIZA subscription	% of total commodities indicated
Bananas	16	0,30%	1	0,03%
Litchis	23	0,44%	0	0,00%
Mangoes	35	0,66%	2	0,06%
Papayas	2	0,04%	0	0,00%
Pineapples	3	0,06%	0	0,00%
Other Subtropical Fruit	13	0,25%	5	0,16%
Total Subtropical Fruit	279	5,29%	24	0,76%
Blackberries	4	0,08%	2	0,06%
Blueberries (potted)	59	1,12%	34	1,08%
Blueberries (soil)	57	1,08%	33	1,05%
Gooseberries	3	0,06%	3	0,10%
Raspberries	5	0,09%	3	0,10%
Strawberries	15	0,28%	10	0,32%
Other Berries	10	0,19%	7	0,22%
Total Berries	153	2,90%	92	2,92%

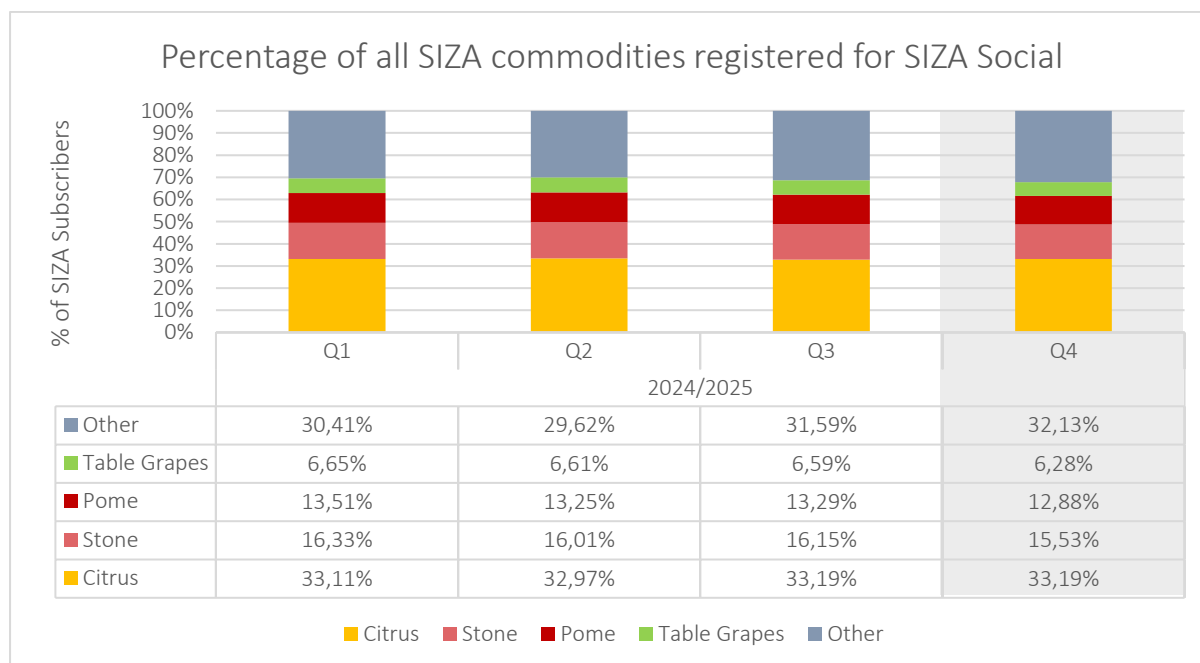
	All South Africa		Western Cape	
Commodity	Number of commodity represented in SIZA subscriptions	% of total commodities indicated	Number of commodity represented in SIZA subscription	% of total commodities indicated
Asparagus	2	0,04%	0	0,00%
Beetroot	11	0,21%	6	0,19%
Broad Beans	2	0,04%	2	0,06%
Broccoli	15	0,28%	10	0,32%
Butternuts	57	1,08%	46	1,46%
Cabbage	15	0,28%	4	0,13%
Carrots	16	0,30%	6	0,19%
Cauliflower	10	0,19%	6	0,19%
Celery	5	0,09%	1	0,03%
Cucumber	5	0,09%	0	0,00%
Garlic	5	0,09%	1	0,03%
Green Beans	10	0,19%	2	0,06%
Kale	2	0,04%	1	0,03%
Lettuce	5	0,09%	2	0,06%
Okra	1	0,02%	0	0,00%
Onion	31	0,59%	20	0,63%
Other Marrows	7	0,13%	3	0,10%
Patty Pans	6	0,11%	1	0,03%
Peas	2	0,04%	0	0,00%
Potato	22	0,42%	11	0,35%
Pumpkin	36	0,68%	21	0,67%
Spinach & Chard	9	0,17%	6	0,19%
Spring Onion	3	0,06%	1	0,03%
Sweet Potato	9	0,17%	6	0,19%
Tomatoes	25	0,47%	15	0,48%
Zucchini/Baby Marrow	13	0,25%	4	0,13%
Other Vegetables	29	0,55%	9	0,29%
Total Fresh Vegetables	351	6,66%	184	5,84%
Almonds	14	0,27%	14	0,44%
Macadamia Nuts	97	1,84%	4	0,13%
Pecan Nuts	15	0,28%	4	0,13%
Other	5	0,09%	2	0,06%
Total Nuts & Seeds	131	2,48%	24	0,76%
Canned Apricots	5	0,09%	5	0,16%
Canned Peaches	11	0,21%	11	0,35%
Canned Pears	1	0,02%	1	0,03%
Total Canning Fruit	17	0,32%	17	0,54%

	All South Africa		Western Cape	
Commodity	Number of commodity represented in SIZA subscriptions	% of total commodities indicated	Commodity	Number of commodity represented in SIZA subscriptions
Fynbos & Proteas	31	0,59%	29	0,92%
Other Flowers and Ornamentals	14	0,27%	9	0,29%
Total Flowers & Ornamentals	45	0,85%	38	1,21%
Dried Fruit	9	0,17%	6	0,19%
Raisins	16	0,30%	4	0,13%
Other Dried Fruit and Vegetables	1	0,02%	0	0,00%
Total Dried Fruit & Dried Vegetables	26	0,49%	10	0,32%
Maize	12	0,23%	0	0,00%
Soybeans	2	0,04%	0	0,00%
Wheat	6	0,11%	3	0,10%
Other Grains	5	0,09%	3	0,10%
Total Grains	25	0,47%	6	0,19%
Meat	8	0,15%	6	0,19%
Poultry	2	0,04%	1	0,03%
Wool/Mohair	4	0,08%	4	0,13%
Dairy Products	4	0,08%	4	0,13%
Total Livestock & Animals	18	0,34%	15	0,48%
Avocado oil	1	0,02%	0	0,00%
Essential Oils	1	0,02%	1	0,03%
Olive Oil	1	0,02%	1	0,03%
Sugar	3	0,06%	0	0,00%
Sugar Cane	7	0,13%	0	0,00%
Total Sugar & Oils	13	0,25%	2	0,06%
Fresh Herbs	9	0,17%	2	0,06%
Seasonings	2	0,04%	1	0,03%
Preservatives	1	0,02%	0	0,00%
Total Seasoning & Preservatives	12	0,23%	3	0,10%
Bell Peppers	8	0,15%	1	0,03%
Pequin Peppers	1	0,02%	0	0,00%
Other peppers	4	0,08%	0	0,00%
Total Capsicum	22	0,42%	1	0,03%
Apple Juice	1	0,02%	1	0,03%
Orange Juice	1	0,02%	0	0,00%
Other Juices	2	0,04%	1	0,03%
Total Juice	4	0,08%	2	0,06%

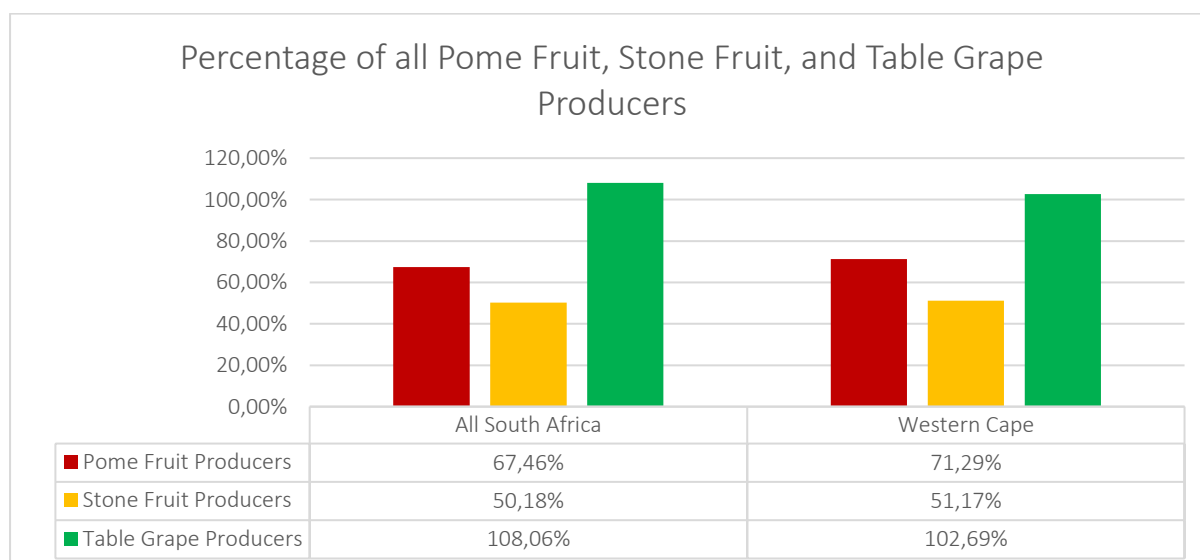
	All South Africa		Western Cape	
Commodity	Number of commodity represented in SIZA subscriptions	% of total commodities indicated	Commodity	Number of commodity represented in SIZA subscriptions
Cotton	1	0,02%	0	0,00%
Dates	7	0,13%	0	0,00%
Dragon Fruit	7	0,13%	3	0,10%
Figs	26	0,49%	23	0,73%
Granadillas	10	0,19%	3	0,10%
Guavas	15	0,28%	10	0,32%
Kiwis	30	0,57%	12	0,38%
Melon	7	0,13%	4	0,13%
Olives	20	0,38%	20	0,63%
Persimmons	12	0,23%	12	0,38%
Pomegranates	43	0,82%	38	1,21%
Tea	18	0,34%	17	0,54%
Watermelon	15	0,28%	8	0,25%
Other Products not listed above	58	1,10%	34	1,08%
Total Other products	269	5,10%	184	5,84%
Total Varieties	5273	100%	3150	100%

1.3.1. Commodity Statistics

Below is a representation of the four commodities with the biggest representation among SIZA subscriptions, namely Citrus, Stone Fruit, Pome Fruit, and Table Grapes. When comparing the latest available information provided by SIZA subscribers on MySIZA with information provided by the relevant Industry Associations, one can see that a significant percentage of each commodity is represented in the SIZA subscription base.

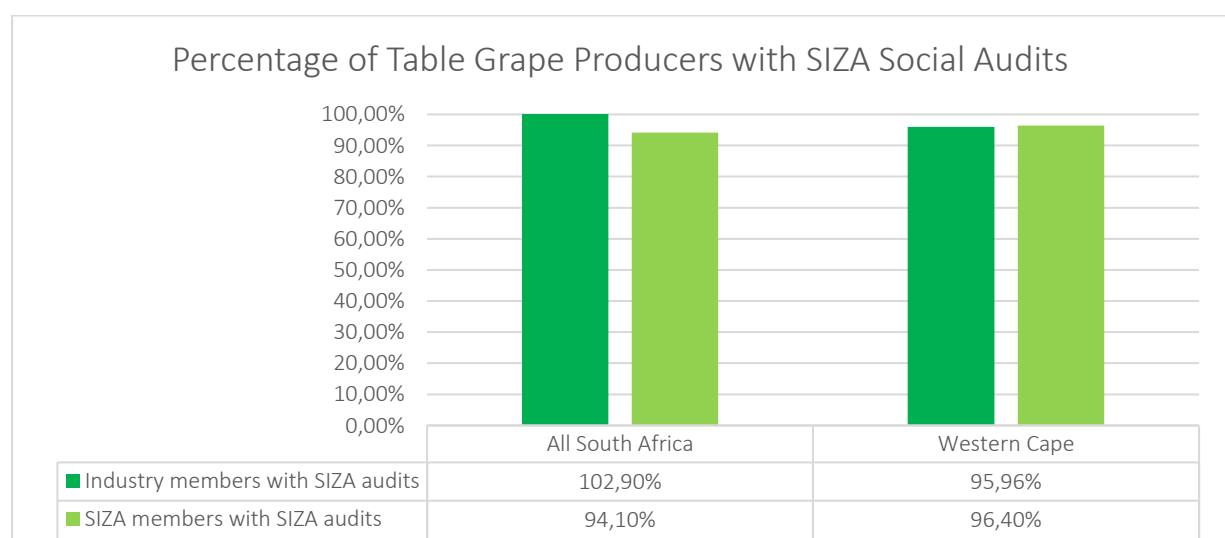
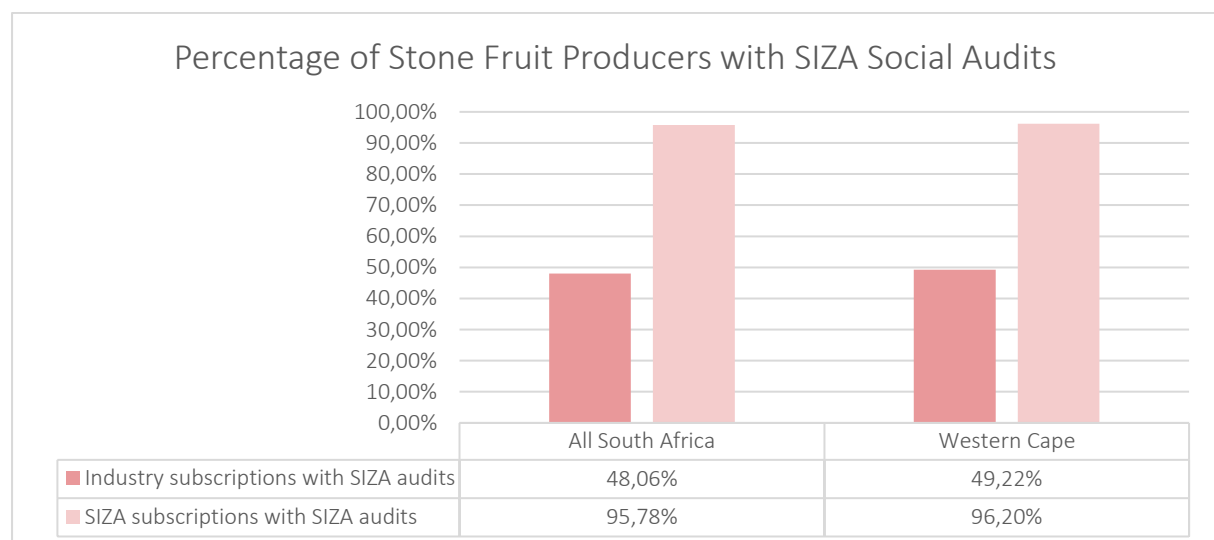
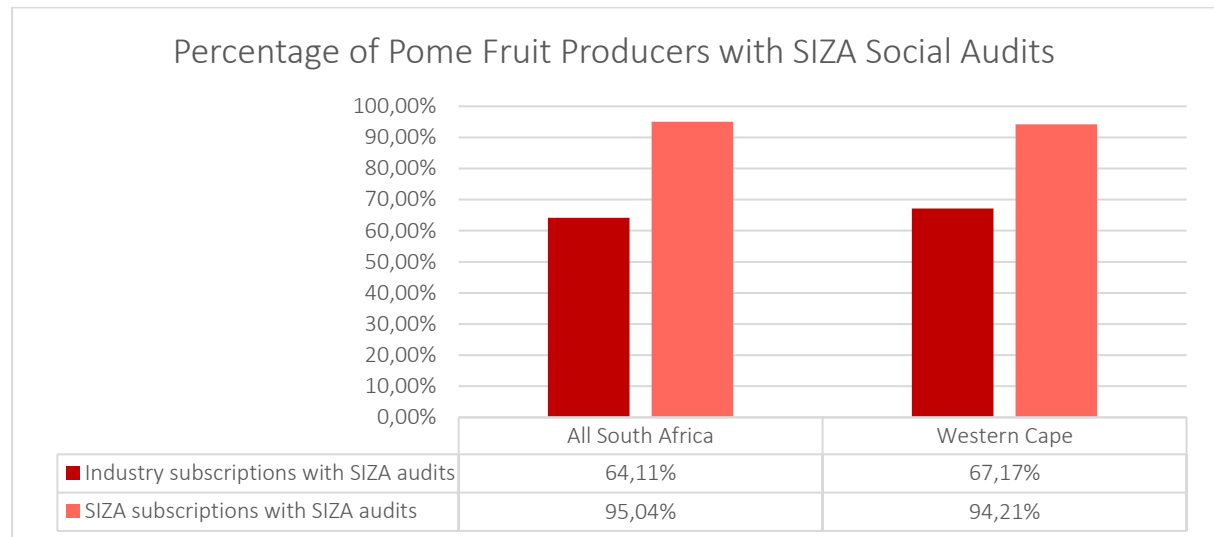


SIZA Social subscriptions are currently dominated by four fruit industries – the Citrus, Stone, Pome and Table Grape industries. These four industries were key to the initial founding of SIZA which can be seen in their significant commitment to the SIZA Standards. Other agricultural industries also contribute significant subscription to SIZA, albeit at smaller numbers per industry currently.

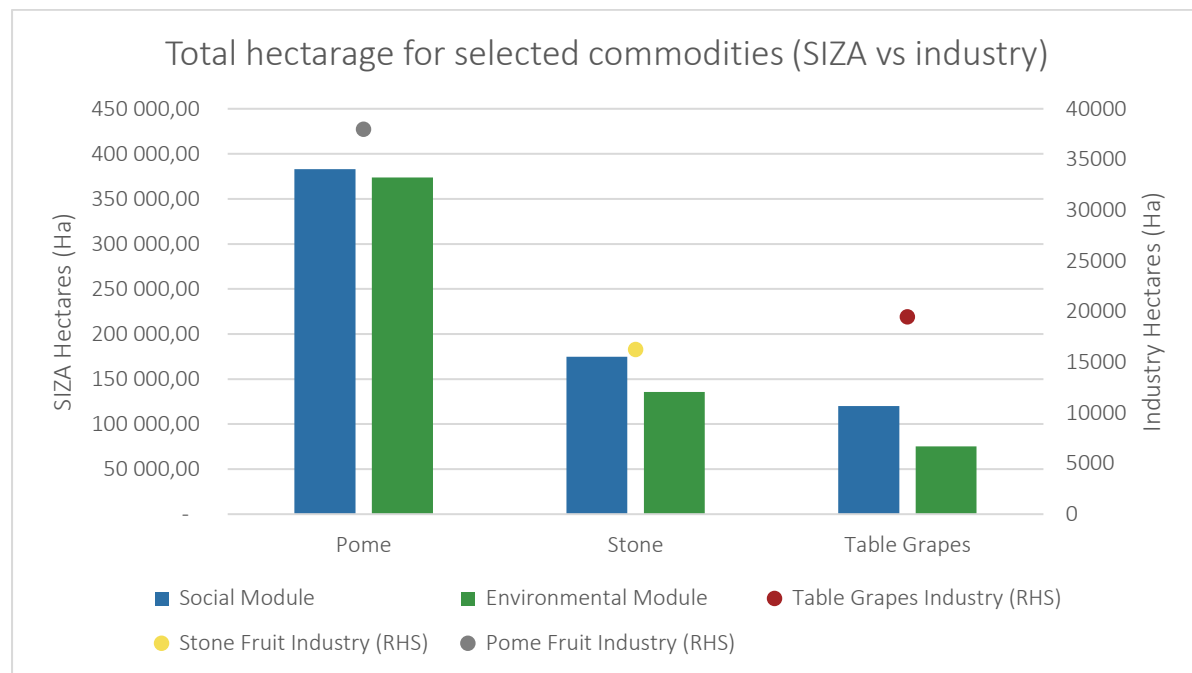


Interesting to note is that there are more Table Grape producers registered with SIZA than with the Industry Association. This might be due to a difference in how subscriptions are determined/calculated within the industry body compared to SIZA, for example per production unit, instead of business entity, separate trade entities, etc. Therefore, SIZA's registration structure may indicate more subscriptions compared to the industry body. In the Western Cape specifically, 71,29% of Pome Fruit producers, 51,17% of Stone Fruit

producers, and 102,69% of Table Grape producers are registered for the SIZA Social module. It is notable that there is a slight decrease compared to the previous quarter in terms of the number of industry members represented by SIZA, which is likely due to a growing industry overall. It's also notable that more businesses are forming multisites as larger commercial businesses are incorporating smaller farms to ease the economic burdens and challenges which could also affect the slightly lower representation.

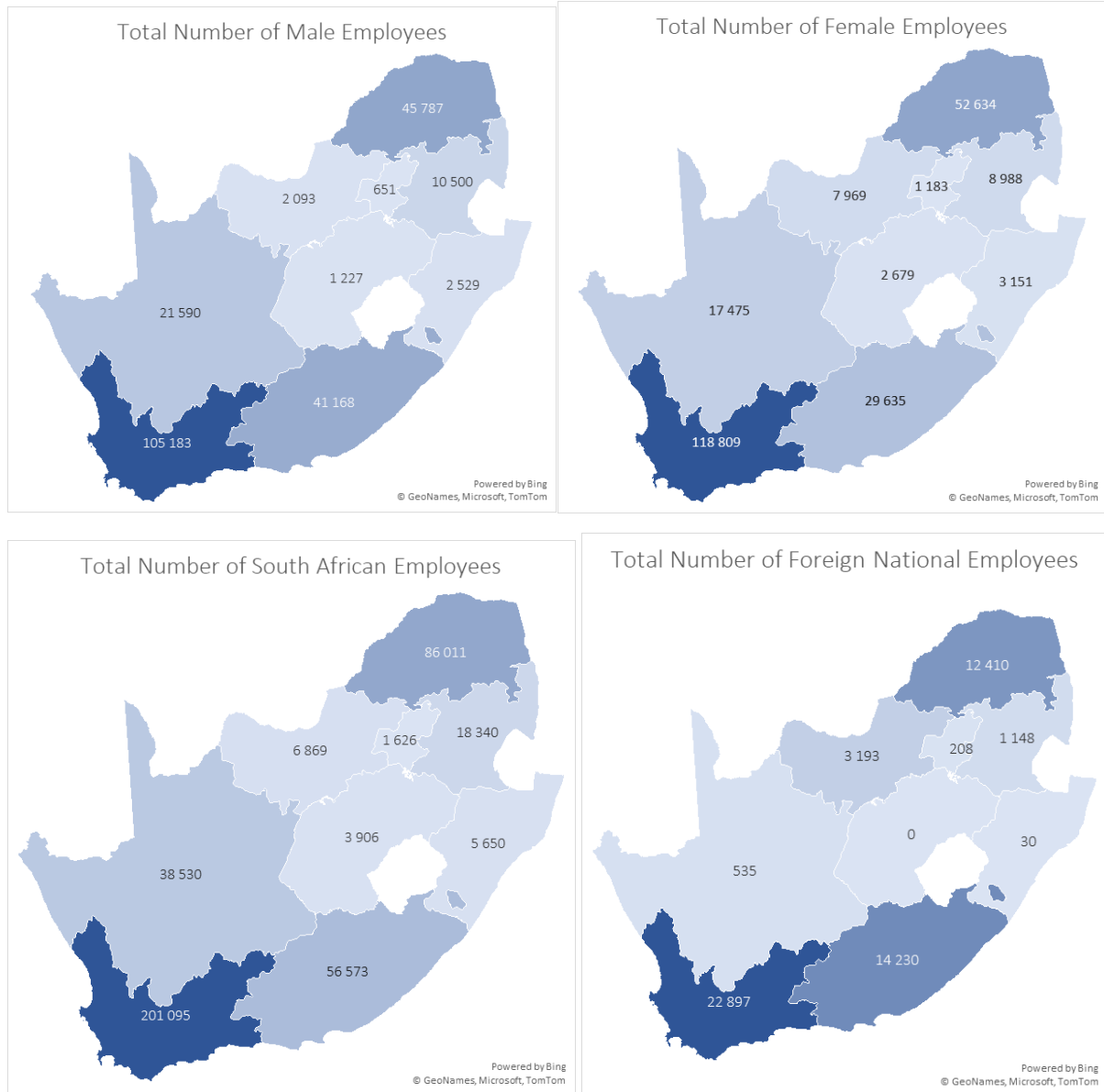


The below graph illustrates the total hectareage for the above selected commodities represented under the SIZA Environmental and Social standards. The industry hectares are displayed on the right vertical axis, while the SIZA hectares are displayed on the left vertical axis. It is important to note that, as SIZA evaluate the centralised maangement system, the total hectareage for each commodity is the sum of the total area of all sites containing each respective commodity. Therefore, a site with multiple commodity types will have its total hectareage counted towards each commodity type contained within that site. This could result in large differences between the total hectares per commodity under SIZA and under the respective industry bodies.



1.4. Worker Summary

The following summary represents information relating to agri-workers working on farms that are registered under the SIZA programme. Data is obtained from the SAQs that were completed by the producer and approved over the last 12 months. The Western Cape accounts for the highest number of employees (46,26%) due to the large number of SIZA subscribers that are based in the Western Cape.



The table below page indicates the worker distribution per province and worker type:

Province	Permanent Male	Permanent Female	Temporary Male	Temporary Female	Labour Service Provider Male	Labour Service Provider Female	Foreign National Male	Foreign National Female	Total Workers per Province
Unknown	836	457	2 770	2 805	0	0	319	510	7 697
Eastern Cape	9 991	3 681	22 730	19 312	377	482	8 070	6 160	70 803
Free State	727	1 203	500	1 476	0	0	0	0	3 906
Gauteng	322	421	216	639	12	16	101	107	1 834
KwaZulu-Natal	1 116	1 037	857	1 558	537	545	19	11	5 680
Limpopo	17 097	11 843	18 696	34 199	2 254	1 922	7 740	4 670	98 421
Mpumalanga	4 936	2 736	4 122	5 829	559	158	883	265	19 488
Northern Cape	4 342	1 435	17 042	15 711	0	0	206	329	39 065
North West	885	692	683	4 429	5	175	520	2 673	10 062
Western Cape	37 806	23 675	52 049	77 259	5 384	4 922	9 944	12 953	223 992
Total Workers per Type	78 058	47 180	119 665	163 217	9 128	8 220	27 802	27 678	480 948

The following four tables indicates a breakdown on the percentages per province of TES and union representation. The information was collected using specific questions on all SAQs focusing on the four main fruit commodities which represent majority of the Primary SIZA subscription.

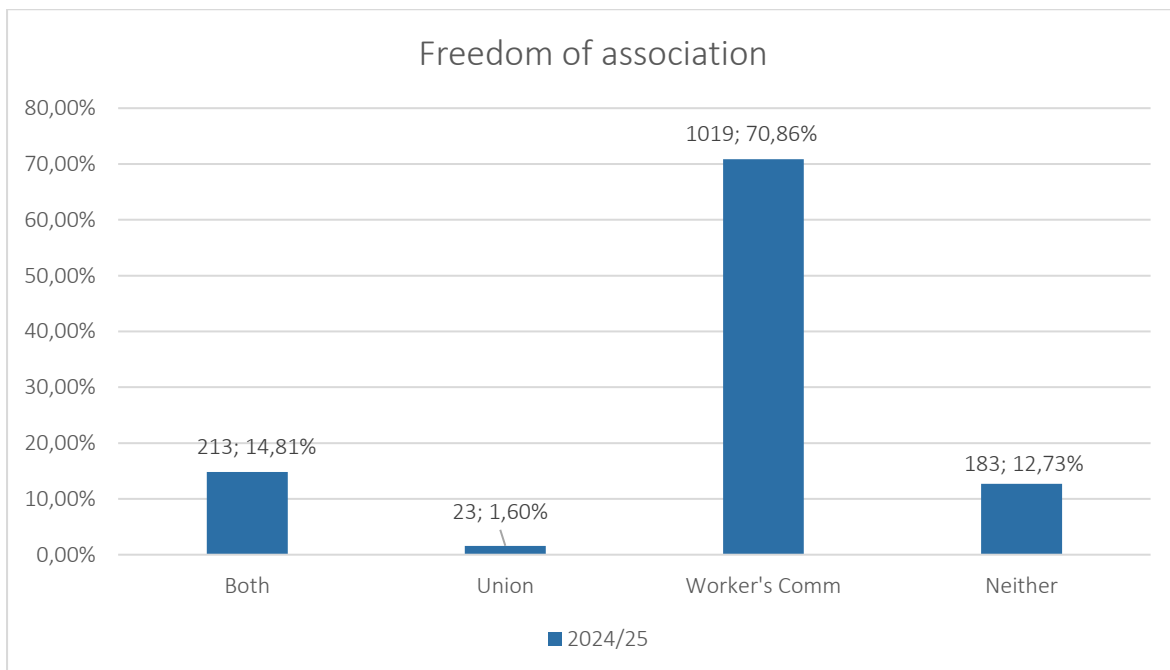
Percentage of producers with a TES and a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,00%	0,00%	0,09%	0,00%	0,00%	0,00%	0,00%	0,00%	2,65%
Pome Fruit	0,00%	0,00%	0,12%	0,00%	0,00%	0,00%	0,00%	0,00%	2,71%
Citrus	0,13%	0,00%	0,04%	0,00%	0,98%	0,45%	0,00%	0,00%	1,38%
Table grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,73%

Percentage of producers with a TES and without a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,09%	0,00%	0,18%	0,00%	0,27%	0,00%	0,00%	0,00%	6,95%
Pome Fruit	0,24%	0,00%	0,12%	0,00%	0,00%	0,00%	0,00%	0,00%	5,54%
Citrus	0,45%	0,00%	0,04%	0,00%	0,85%	0,18%	0,00%	0,00%	3,70%
Table grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	2,94%

Percentage of producers without a TES and with a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,18%	0,09%	0,00%	0,00%	0,09%	0,00%	0,00%	0,18%	19,20%
Pome Fruit	1,53%	1,06%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	26,27%
Citrus	6,63%	0,00%	0,00%	0,22%	2,32%	0,67%	0,80%	0,13%	7,61%
Table grapes	0,00%	0,00%	0,00%	0,00%	2,75%	0,00%	11,56%	0,18%	27,89%

Percentage of producers without a TES and without a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,18%	0,00%	0,00%	0,00%	0,09%	0,00%	0,00%	0,00%	4,30%
Pome Fruit	0,59%	0,12%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	7,54%
Citrus	1,20%	0,00%	0,00%	0,00%	1,38%	0,31%	0,22%	0,00%	1,29%
Table grapes	0,00%	0,00%	0,00%	0,00%	1,47%	0,00%	1,47%	0,18%	8,44%

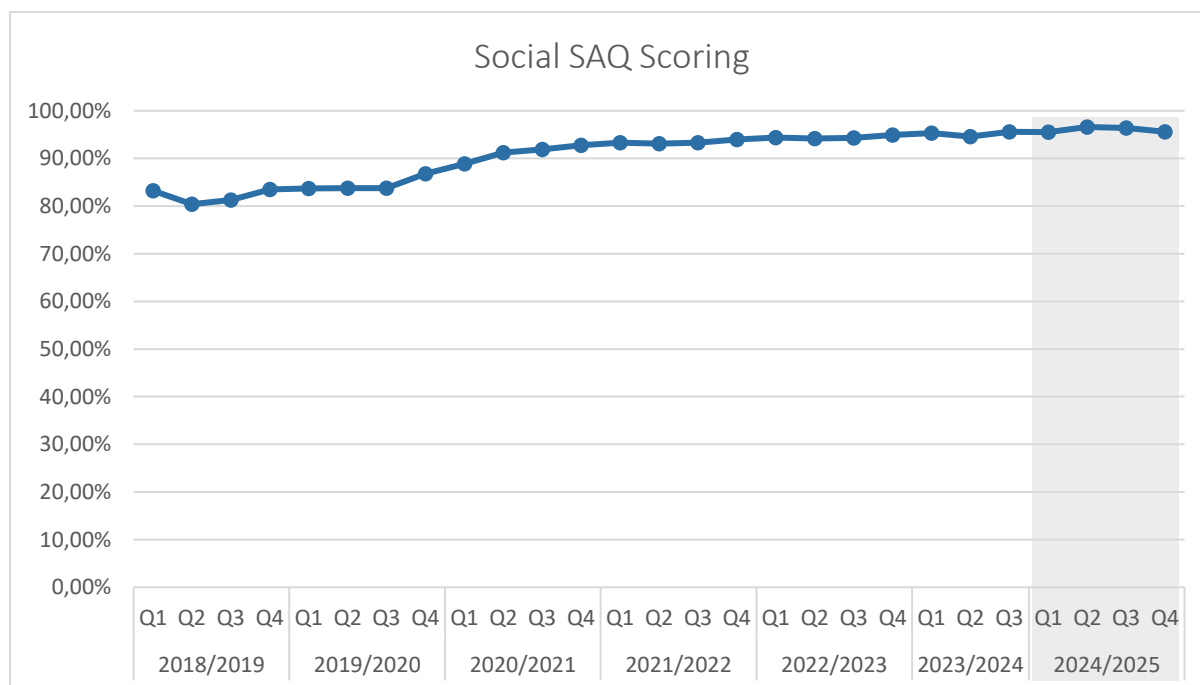
The below graph illustrates the intersection between labour unions and worker committees. This graph compares the proportions of worker protection associations between the entire 2024/2025 period and specifically for Q4 of the 2024/2025 reporting period. This graph suggests that the prevalence of union and workers committees are independent of one another. 70,86% of subscribers in the 2024/2025 period had recognised worker's committees, while 1,60% had recognised workers' unions. 14,81% of subscribers recognised both worker unions and workers committees, whereas 12,73% of subscribers had neither.



2. SELF-ASSESSMENT QUESTIONNAIRE (SAQ)

The purpose of the SAQ is for primary subscribers to have an opportunity for self-evaluation and to benchmark against South African legislation. SAQs are also important for the auditing process, as the auditors use the SAQ information as a benchmark during third-party audits. SIZA also uses the SAQ as a between audit online monitoring tool to ensure that audit results are maintained between audits and to ensure that a three- or two-year audit period is possible.

SAQs indicate growth and improvement year on year, as the primary subscribers are required to complete their SAQs annually. *MySIZA* allows for feedback to the subscriber by means of a risk indicator, which scores each answer according to the risk it holds. SIZA SAQ percentages are risk-based, and not completion-based, meaning that the percentage score assigned to each SAQ is based on the risk level associated with the answers provided by the subscriber, and not an indication of how many questions were completed. The average score for all Social (Ethical) SAQs approved in Q4 is 95,60%. The highest score for an approved SAQ in this period is 100%. SIZA administrative staff try to 1) only approve SAQs for existing subscribers with a SAQ risk score above 85% (5% higher than 2020) and 2) complete a maximum of two SAQ reviews before approval. SIZA administrative staff assist new SIZA subscribers with low scores to improve their scores every year before approval.

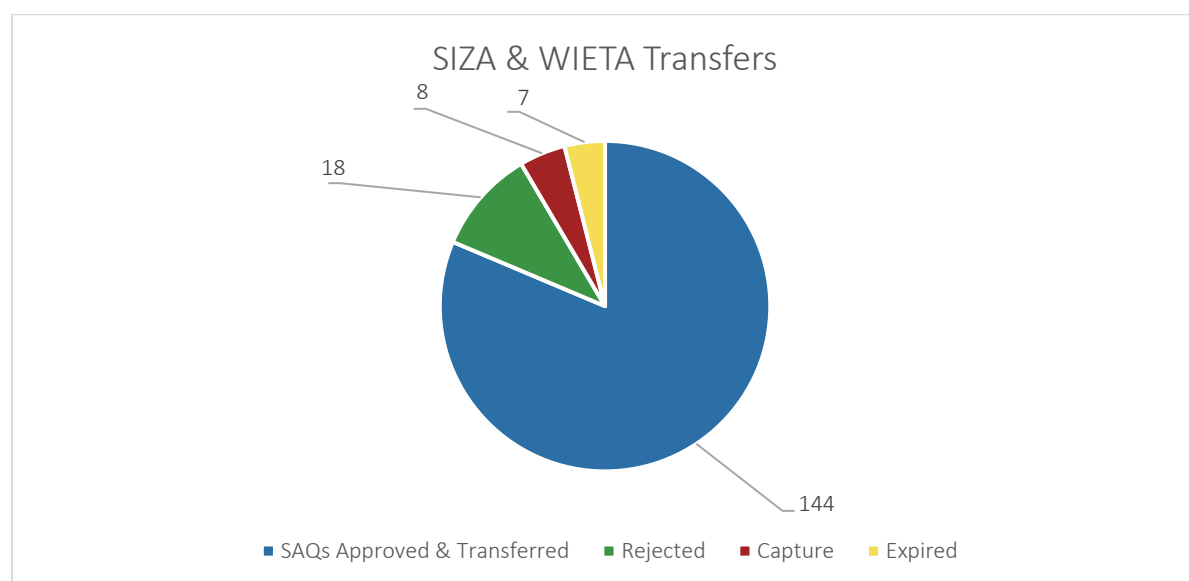


2.1. WIETA Transfer Collaboration

SIZA and WIETA have collaborated to create a combined audit process for agricultural businesses. This allows them to fulfil certification requirements for both standards through a single social audit. The partnership, which began in 2017, enables dual subscriptions to receive separate audit reports and Audit Completion Letters, simplifying the overall process.

Starting from June 1, 2024, SIZA has introduced a new procedure to further streamline and avoid duplication for the completion of Self-Assessment Questionnaires (SAQs) for producers. Under this new arrangement, producers will only need to complete the SAQ on the SIZA platform. After that, SIZA will transfer the necessary SAQ data to the WIETA platform on their behalf. This change is aimed at saving time and reducing duplication, allowing producers to address additional WIETA questions directly on the SIZA SAQ. To enable this data transfer, producers must grant SIZA permission to access their WIETA online profile as an authorised user.

Since June, 177 SIZA subscribers have shown interest in utilising this offer on their SAQs. 144 of these SAQs have already been reviewed and approved, resulting in successful transfers to the WIETA platform.



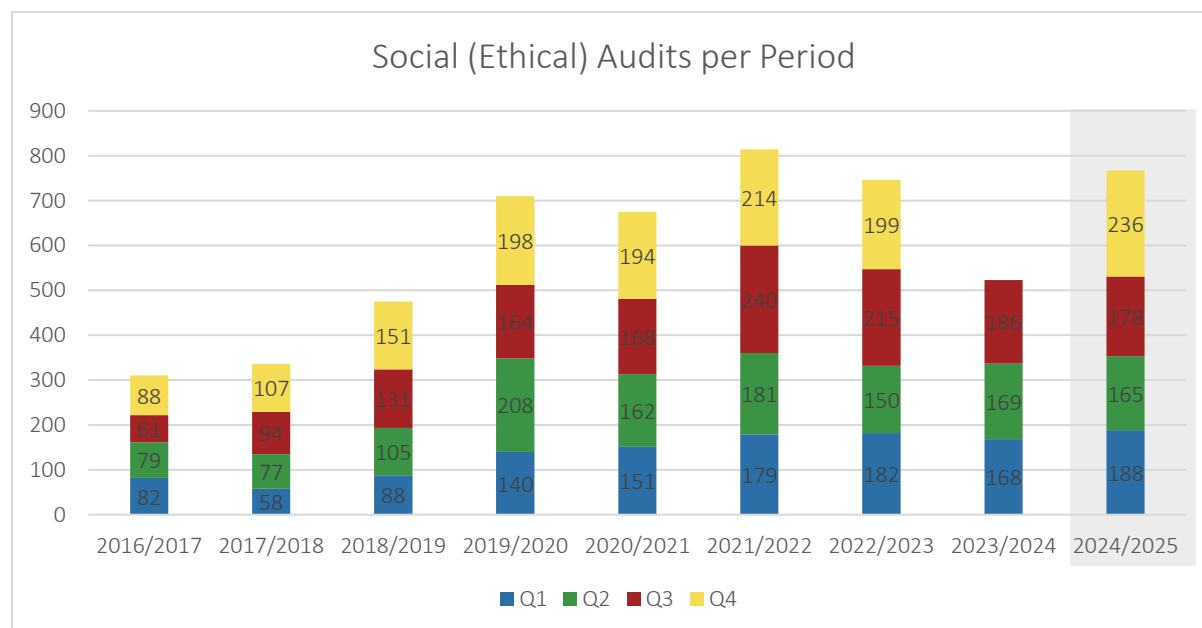
3. SOCIAL (ETHICAL) THIRD-PARTY AUDIT INFORMATION

3.1. Social (Ethical) Audits per Period

SIZA adopted a third-party audit approach to allow for a credible and objective process which can be a true reflection of the audit outcome and ethical labour practices in a business. A SIZA Social (Ethical) audit is not a pass-or-fail exercise but rather aimed at assisting all people living and working in agriculture to drive ongoing improvement in terms of socially responsible business practices. The purpose of the third-party audit is to evaluate the implementation of labour legislation as indicated in the SIZA Social Standard by evaluating and identifying areas within the business that are non-compliant and require corrective and remedial actions, so that ongoing continuous improvement can take place.

As with the growth in subscriptions, we saw steady growth over the last seven years in the number of Social (Ethical) audits per year. Since 2016, a total of 5 356 Social (Ethical) audits have been conducted. It is important to take note of the SIZA Audit Frequency Matrix, which results in some producers achieving longer or shorter audit validity periods, which means they might audit every third- or second year, and others might audit annually, depending on market specification and the acceptance of the SIZA methodology. This ties in with the seasonality of agricultural production seasons and may impact the total audits per quarter, depending on the number of subscribers for a particular commodity group who only audit in peak season. It is also noteworthy to see the impact during the COVID-19 pandemic between 2020 and 2022, which also played a role.

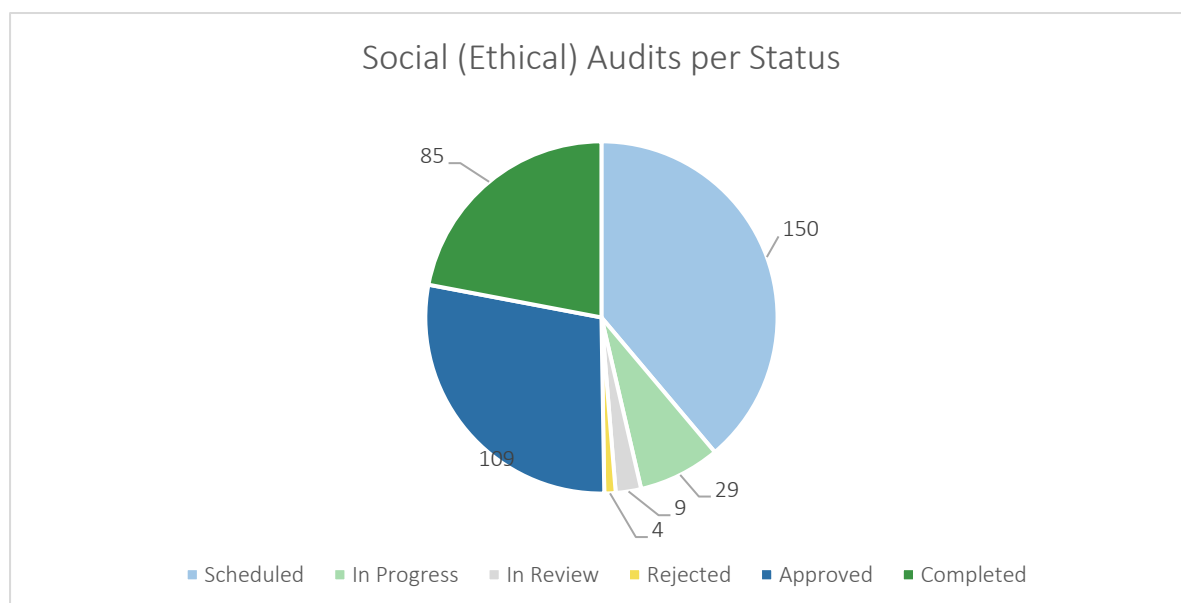
Over the last annual period, a total of 767 social audits were done, whilst in the past three months (Q4), between 1 January and 31 March 2025, a total of 236 social audits were conducted. This steady growth that is shown can be related to the expansion of becoming a multisector agri-wide programme. The graph below indicates the number of audits per quarter for every year since 2016 and showcases the steady gradual increase of audits over time.



3.2. Audits per Status during the Audit Process

The emphasis in the SIZA programme is on continuous improvement (identifying areas of risk) to create better circumstances for all living and working on farms. Therefore, it is important to note that no Audit Completion Letter can be issued if all corrective actions are not completed and signed off by the auditor. If audits are not in completed status, it means that the audit process is not completed in full.

Of the 236 audits that were conducted during Q4, 85 have already been completed in full, and 109 are in Approved status and awaiting corrective actions which must be uploaded by the producer. The remaining 42 audits are rejected (4), in progress (29), or still being reviewed (9) by the audit firms. It is important to note that there are timelines allocated to all the steps in the audit process for both the auditor and the auditee.

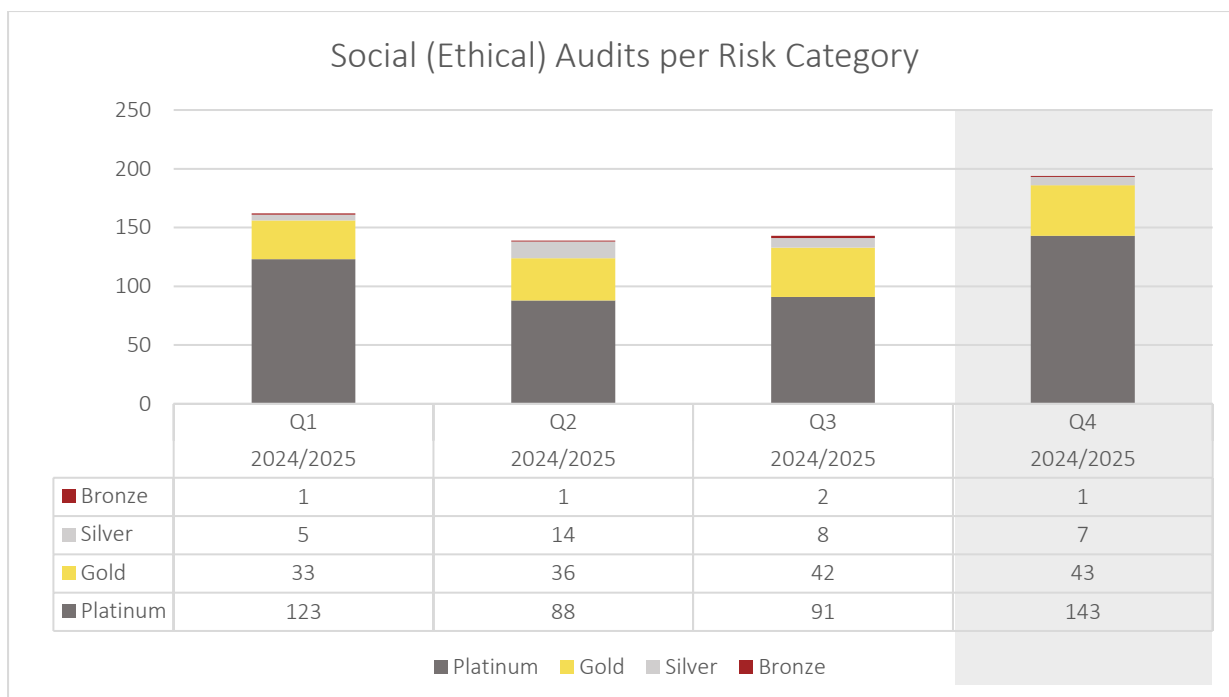


3.3. Social (Ethical) Audits per Risk Category

The SIZA Social (Ethical) programme subscribes to being improvement-led rather than audit-led and uses the [SIZA audit frequency matrix](#) to support this position. It creates four categories of risk: Platinum, Gold, Silver, and Bronze where the Platinum category has the most stringent qualifying criteria. A SIZA subscriber will be rated according to these risk categories, based on the number and rating of each finding during their audit. As the business must drive continuous improvement and implement the required practices within their business, they should aim to get fewer findings and a higher rating during their next audit.

It is possible that in some instances, auditees can get a lower rating due to the expansion of the audit checklist as well as some new market requirements or changes to legislation that were included over the last couple of years.

Of the audits done during this reporting period, 143 achieved Platinum status, and 43 achieved Gold status. Producers are showcasing their commitment to continuous improvement, and this is evaluated and proven by the third-party audit outcomes. Of the audits done during this period, 157 were in the Western Cape, of which 115 achieved Platinum status, and 35 achieved Gold status. Producers are showcasing their commitment to continuous improvement, and this is evaluated and proven by the third-party audit outcomes.



While the number of findings increases with each period, due to an increase in audits and more comprehensive auditor calibration efforts, the majority of producers still achieve a Platinum risk rating which provides for a three-year audit validity period. Over the entire 2021/2022 period, a total of 60,66% of producers achieved a Platinum risk rating, whilst in the 2024/2025 period, a total of 69,75% of producers achieved a Platinum risk rating. This is indicative of a consistent drive and effort from South African producers in the export industry toward continuous improvement and best practice.

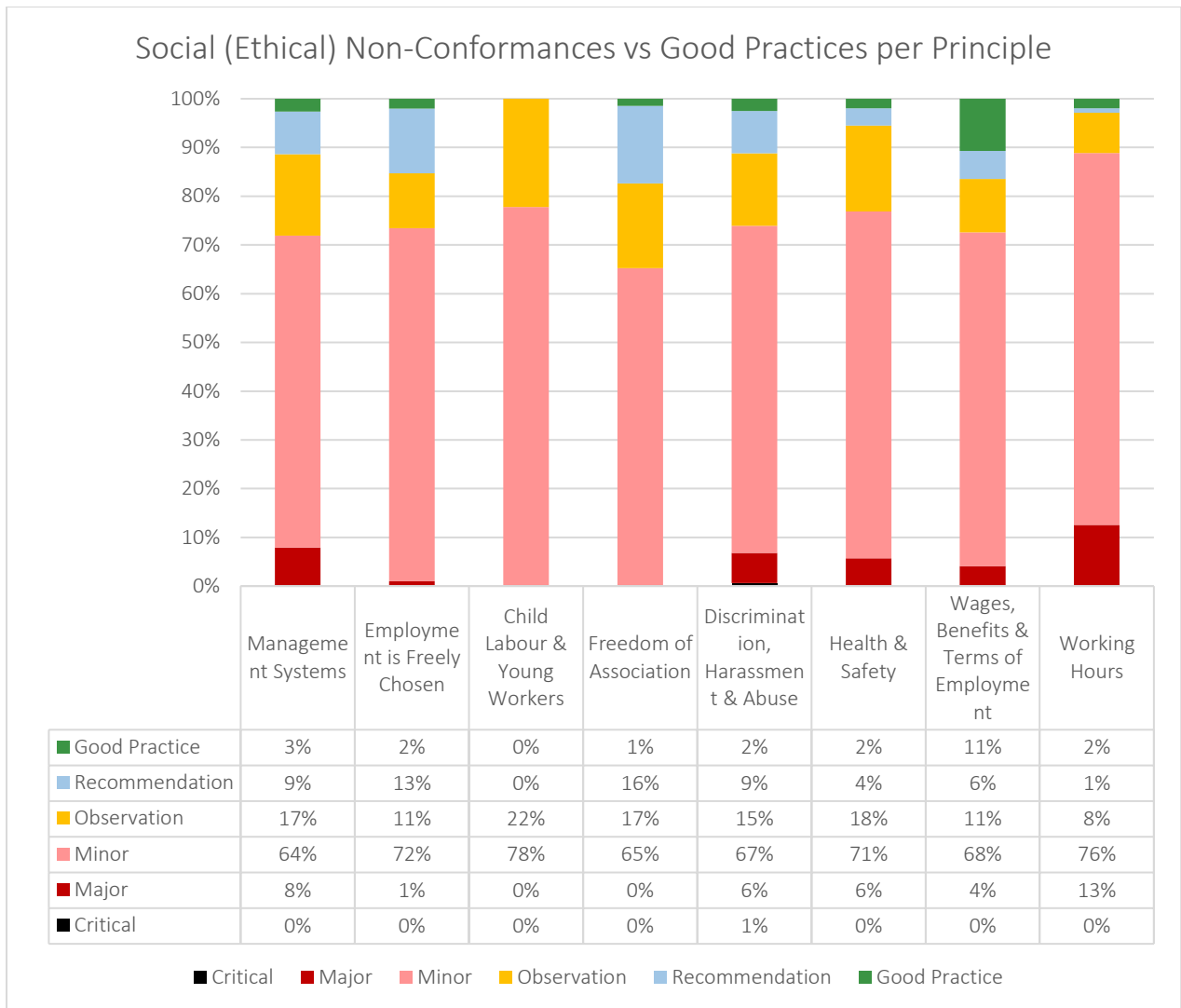
It is pertinent to note that the Bronze risk grading category results in producers being audited every season. This is important as the fewer findings achieved during third-party audits, the longer the validity period will be, but with more findings or more severe findings, a producer will have a shorter validity period. As can be seen in the graph above, the number of producers who achieve a Bronze risk rating remains lower than the producers achieving Platinum and Gold risk ratings, showcasing the increased improved practices over time.

3.4. Non-Conformances Raised between 1 January– 31 March 2025

The non-conformances raised during audits are indicative of the risk areas in the industry. Although the total number of non-conformances may increase slightly between periods, this can be explained by the number of audits increasing, as well as increased training among auditors, leading them to be able to identify more areas of non-conformance. SIZA also expanded the audit checklist as well as some new requirements that were included over the last couple of years. It remains evident that SIZA subscribers continue to improve their practices, which is supported through the various training programmes and guidance tools provided by SIZA. This support proves to be of great assistance when rectifying and improving non-conformances.

The SIZA programme monitors compliance in the following eight principles of the Social Standard:

- Management systems
- Forced Labour (Employment is Freely Chosen)
- Child Labour
- Freedom of Association
- Discrimination, Harassment, and Abuse
- Health & Safety
- Wages, Benefits, and Terms of Employment
- Working Hours



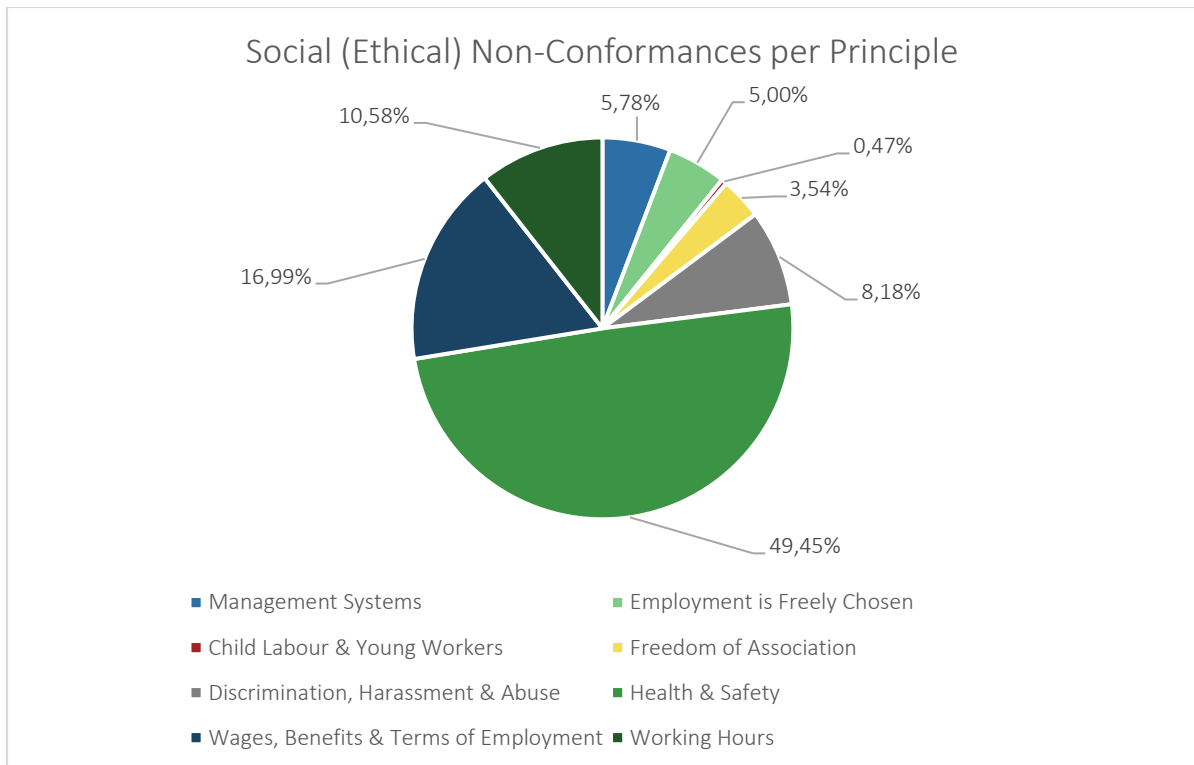
3.4.1. Non-conformances vs good practices per principle

During this period, it is interesting to note that there have been several Good Practices raised (total of 72 new Good Practices noted during audits). The number of Good Practices raised can be explained due to more efficient calibration efforts from auditors on reporting good practices during audits and identifying these practices more effectively. Another reason for this increase can be due to subscribers wanting to showcase a more balanced view of their business practices by implementing a best practice approach rather than just focusing on minimum compliance.

3.4.2. Non-conformances per Principle

In Q4, most non-conformances (77,02%) fell in the following three principle codes, namely:

- Health & Safety (949 findings);
- Wages, Benefits, and Terms of Employment (326 findings); and
- Working Hours (203)



As a measurement in looking at the top three areas of non-conformances, the various audit outcomes under the three top principles can be explained as follows:

Health and Safety:

As a high number of non-conformances are raised under this principle code, it is relevant to mention that this section also covers the most detailed questions and requirement areas during an audit which contributes to the number of non-conformances raised. In general, the largest areas of non-conformances within this section lie with the following themes:

- Inadequate management structure in place to ensure the effective overall management of health and safety matters within the business. This refers to a centralised understanding by senior management of the requirements and implementation of health and safety practices within the business.
- Housing for employees does not meet basic health, safety and hygiene requirements as set out in this Standard and local law. This refers to broken/inadequate fixtures, leaking roofs, potential damage to windows/walls/pipes or electrical wiring etc.
- Although risk assessments are available, it is deemed inadequate as it does not effectively cover all risks prevalent in the business.

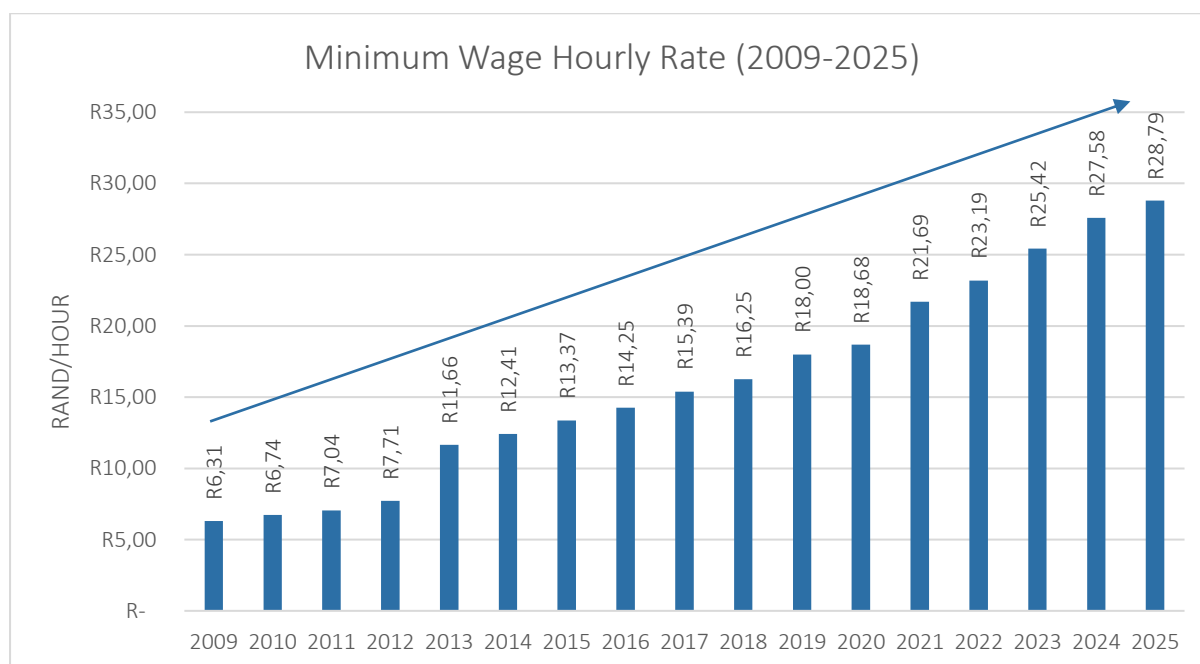
Wages, Benefits & Terms of Employment:

The second largest area of non-conformances lies with wages and contracts of employment. In general, the largest areas of non-conformances within this section fall under the following themes:

- Inadequate contracts of employment provided to employees and payslips which do not contain all the legislatively required information.
- Deductions do not meet minimum legal requirements.
- Ineffective systems in place for the accurate calculation and payment of worker wages. This refers to the wage management system, which is inadequate, resulting in the wage calculation being incorrectly processed.

Background to wages in agriculture in South Africa:

Over the past 16 years, South Africa has witnessed a notable transformation in the agricultural sector, characterised by significant wage increases. These increases have ensured more benefits for agricultural employees with better and more sustainable living conditions in mind. Although a minimum wage principle was tailored since 2009, various Sectoral Determinations promulgated wages for different sectors. Since the adoption of the new National Minimum Wage Act in 2018, a National Minimum Wage was created that served as the floor level below which no employee should be paid. The national minimum wage applies to all workers i.e., any person who works for another person and who receives or is entitled to receive any payment for that work. Although many businesses pay more than the minimum wage in agriculture, this period has seen remarkable progress in the wages earned by agricultural workers, which reflected both the industry's growth and efforts to ensure fair wages. These year-on-year increases in wages has not only improved the living standards of those involved in the sector but has also contributed to greater economic stability and social development in South Africa.



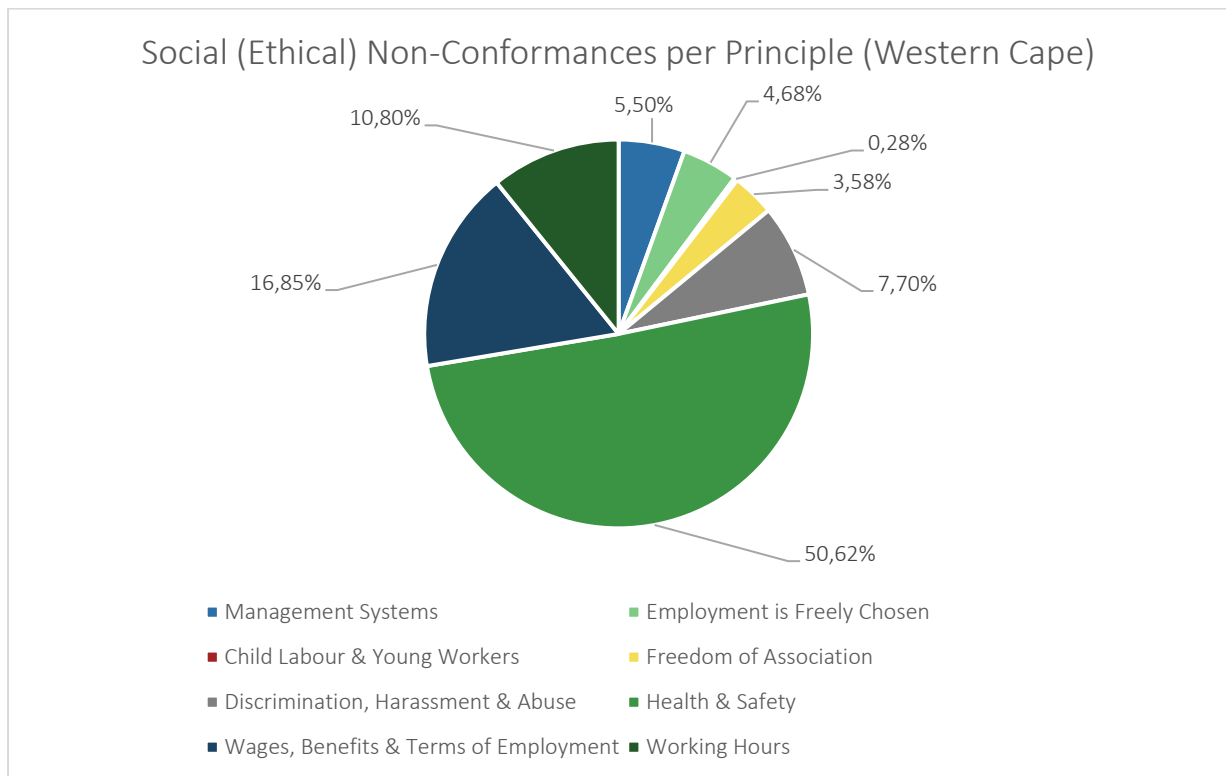
Working Hours:

The third largest area of non-conformances lies with working hours. SIZA implemented training specifically on Working Hours in 2023, resulting in a 37% decrease in the number of findings related to this theme when compared to the three preceding the training's implementation. In general, the largest areas of non-conformances within this section fall under the following themes:

- Overtime does not conform to all the minimum requirements.
- Night-work is not managed and implemented in accordance with the minimum legislative requirements.
- Rest periods and meal intervals are not managed effectively and granted to workers in accordance with legislation as some businesses have inadequate systems in place to monitor rest breaks.

For the **Western Cape**, most non-conformances (78,27%) fell in the following three principles, namely:

- Health & Safety (736 findings);
- Wages, Benefits, and Terms of Employment (245 findings); and
- Working Hours (157 findings)



3.4.3. Risk distribution

The risk of individual producers is categorised by using a scoring matrix which divides risks into categories of Critical, Major, Minor, Observations, Recommendations, and Good Practices. Non-compliances and Observations are classified according to:

- The frequency of the problem and whether the issue is an isolated occurrence.
- The potential severity of the problem.
- The probability of recurrence.
- The management system in place.
- The response of the management

A minor non-compliance is:

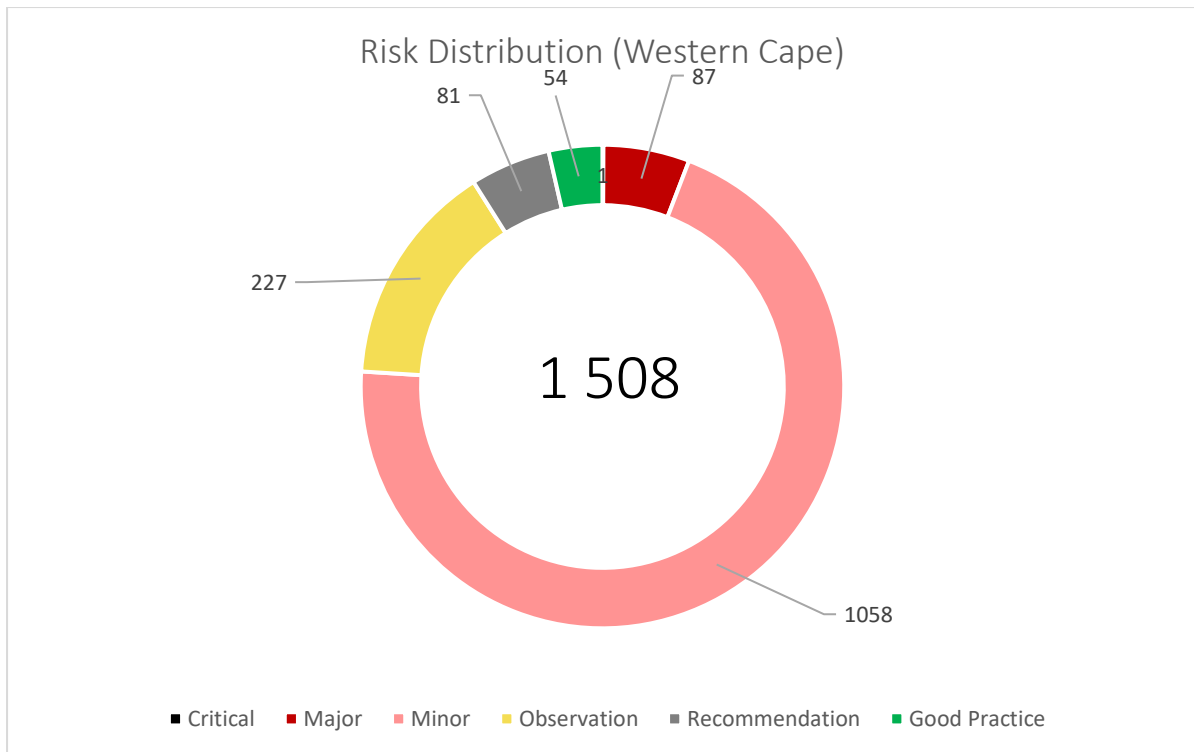
- An occasional or isolated problem.
- An issue which presents a low risk to workers/ those on-site.
- A policy issue or misunderstanding where there is no evidence of a material breach.

A major non-compliance is:

- A breach which represents a danger to workers/those on site.
- A material breach of a code requirement/law.
- A systemic violation of a code requirement/law.

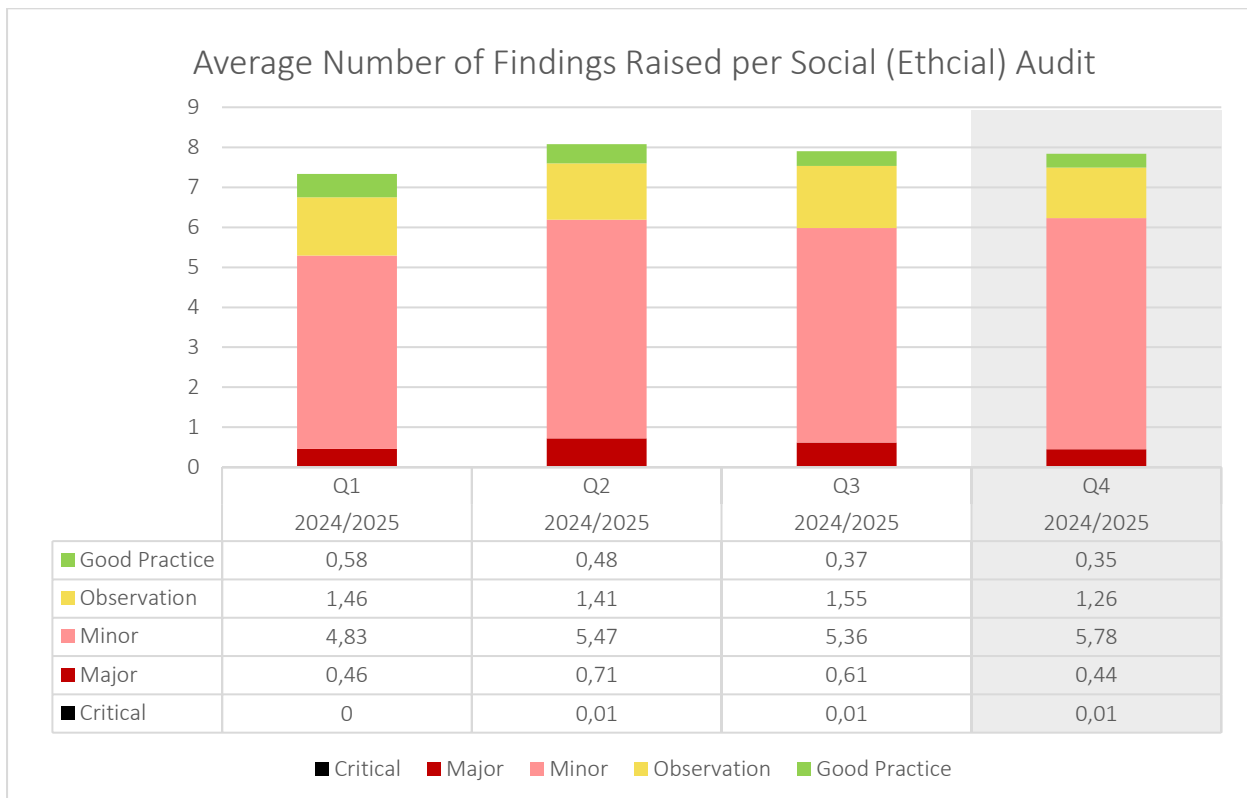
A critical non-compliance is:

- An issue which presents imminent risk to workers' safety/risk to life and limb or constitutes a significant breach of workers' human rights, and/or;
- A major non-compliance that has not been addressed or for which no significant improvement has been made by the time of a follow up audit, despite supplier commitment to resolve the issue.
- An attempt to pervert the course of the audit through fraud, coercion, deception, or interference.



3.4.4. Average number of findings per audit

The graph below indicates the average number of findings that are raised per audit. During Quarter four of the 2024/2025 reporting period, an average of 7,84 findings were raised per audit. For the Western Cape, the average number of findings were slightly lower at 7,67 findings per audit on average. It is an excellent indication of the agricultural industry's improved implementation towards socially responsible practices within their businesses as the average is less than 10 findings per audit.

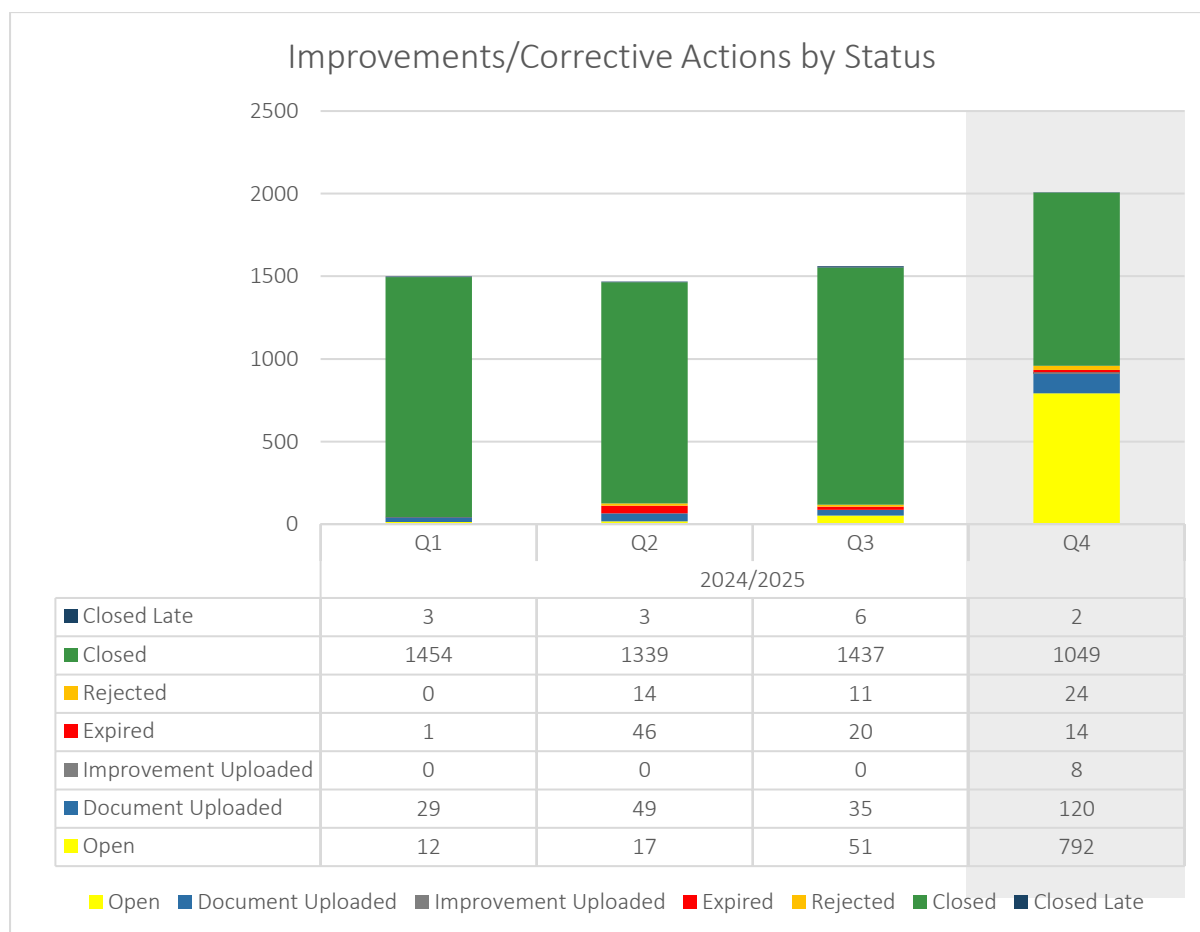


Although the majority of SIZA subscribers received a Platinum risk rating; on average, due to the increased overall number of non-conformances raised on all audits, this results in the average SIZA risk rating of Gold. This is due to the fact that a subscriber's risk rating will immediately move to Gold if a Major non-conformance is raised or when more than 10 Minor non-conformances were raised. Despite many subscribers receiving a Platinum risk rating, the high number of non-conformances results in the average of a Gold risk rating. The overall risk rating of a SIZA subscribers is calculated on the SIZA Audit Frequency Risk Matrix, available here: <https://siza.co.za/wp-content/uploads/Annexure-2-SIZA-Audit-Frequency-Matrix.pdf>

3.5. Improvements and Corrective Actions

As SIZA is a continuous improvement programme, there is a strong focus on driving improvement on findings during audits. The SIZA programme supports this by only issuing Audit Completion Letters once all the corrective actions have been implemented and closed by the third-party auditor. The aim is not only to have an audit done, but to ensure improvement takes place through adequate corrective action. The below graph shows that most findings are closed-out timeously during the given timeframes by producers. The submission and closing of findings before the given deadlines are very important as this showcases the commitment from producers to rectify areas of non-compliances, and the audit validity of a producer will be affected if corrective actions are not completed within these deadlines. SIZA actively motivates and supports producers with the completion of the corrective actions which drives improvement within their own business, as well as throughout the agricultural industry. With each corrective action, the business is growing and improving their practices which in turn benefits the workforce and economy.

The graph below indicates how non-conformances are closed out over time. Expired non-conformances will result in a follow-up audit during the 12 months following the audit date, while open non-conformances indicate that the producer still needs to upload corrective action to show improvement.

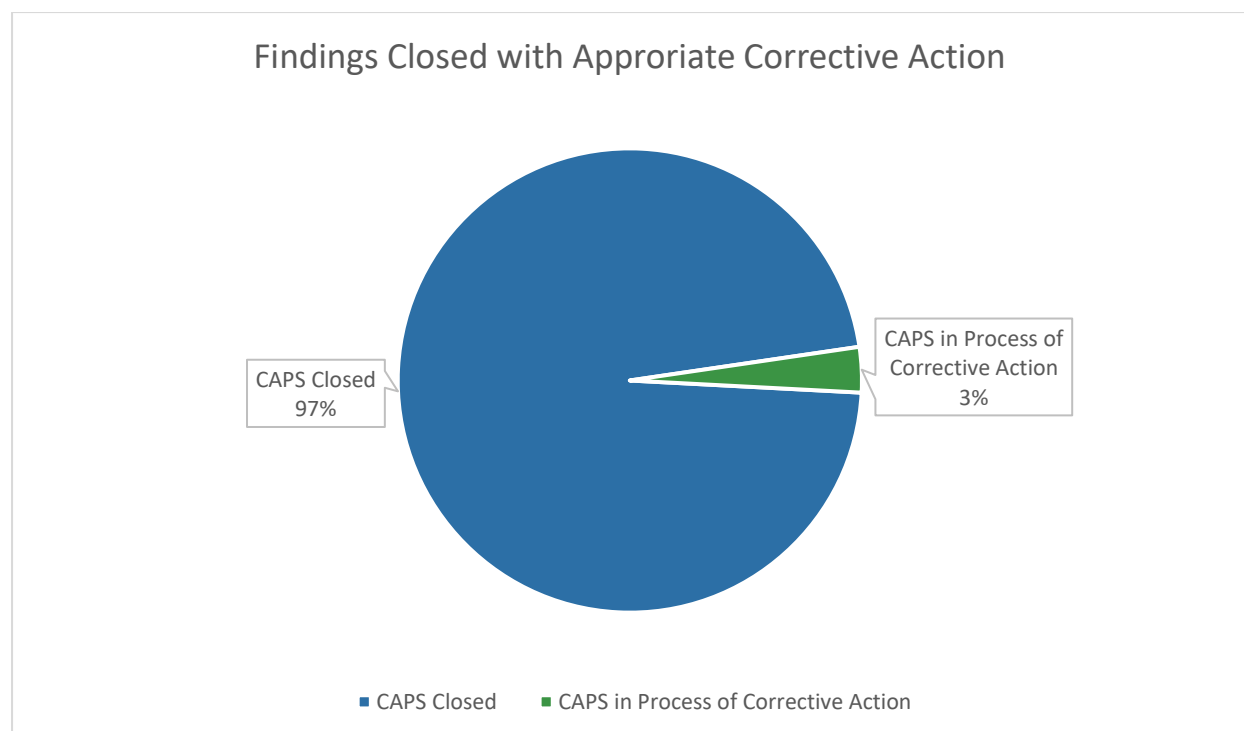


The completion of corrective actions following an audit holds immense importance as it serves as evidence that the site is actively implementing improvements. The purpose of an audit goes beyond merely identifying findings; it aims to highlight areas where measurable improvements can be made. Therefore, it is crucial for businesses to promptly address and implement necessary changes and corrective actions after an audit. The principle of improvement, particularly the expectation of submitting corrective actions post-audit, aligns with the pursuit of transformation and enhancing the overall image of South Africa. Both the industry and South Africa in general are committed to achieving the United Nations' Sustainable Development Goals. To fulfill these commitments, it is vital for tangible adaptations and improvements to be implemented as proof of compliance. The impetus for improvement is also driven by global buyers, as managing their supply chain risks aligns with their own commitments to the UN goals.

The SIZA programme has been designed in a way that reduces the validity period of an audit if corrective actions are not uploaded within the agreed-upon deadline set between the auditor and the producer on the audit day. Consequently, regardless of the initial risk rating (Platinum, Gold, or Silver), the Audit completion letter will only remain valid for one year or one season. Conducting an audit is only the initial step; the subsequent corrective actions are the more crucial part. This demonstrates growth and development, reflecting the continuous improvement of the site and enabling better socially responsible and sustainable practices after and between audit periods.

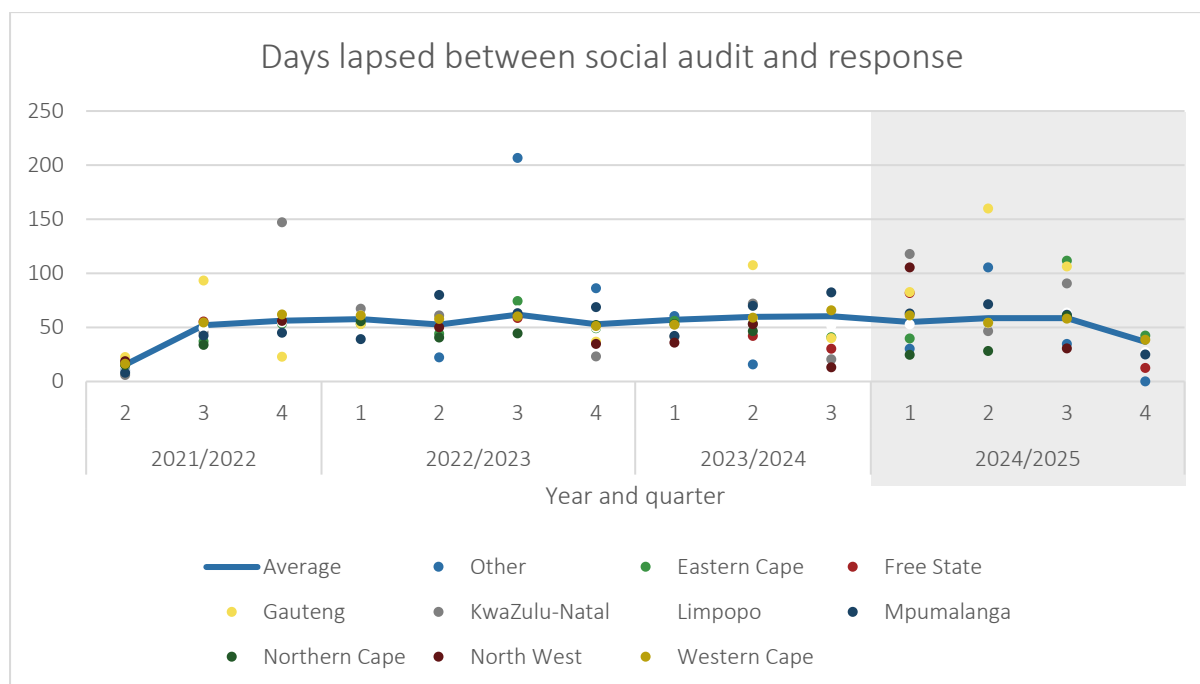
If one looks at the improvement that has taken place over time, it is worthwhile to look at the findings raised since 1 April 2016 until 31 March 2025. A total of 53 694 findings were raised during third-party audits, and 32 000 of these findings have already successfully been closed out and received improvements in practices. This means that 96,85% of all findings have been adequately resolved since 2016.

It is worth noting that third-party auditors allocate a specific timeframe to each corrective action. A supplier may receive between a 30 to 120 day period to submit a particular corrective action, and therefore the most recent audits' corrective actions may still be open.

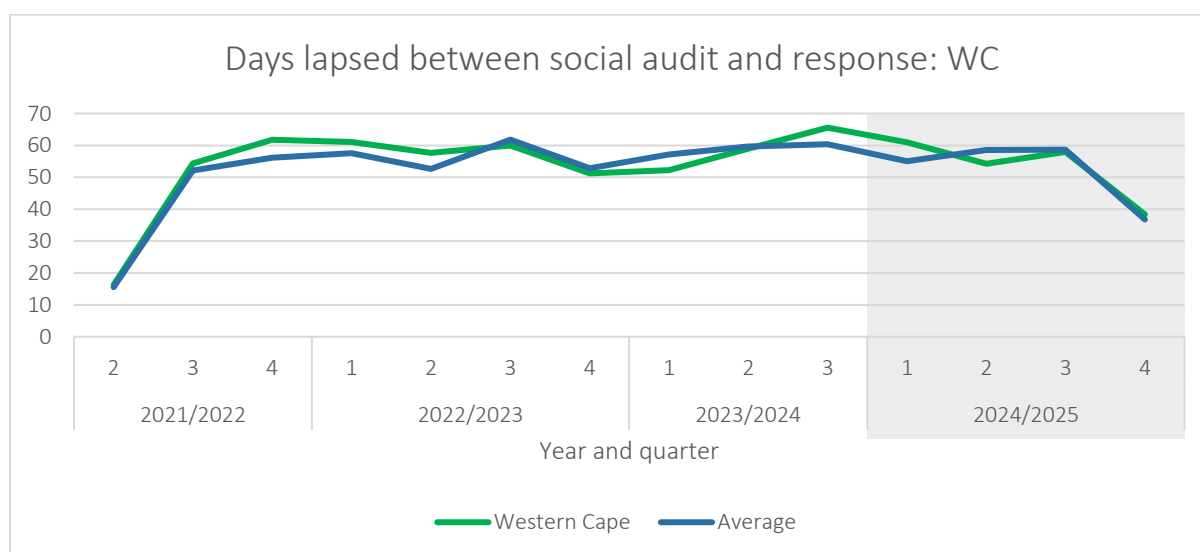


3.6. Time lapsed before corrective action

The below graph illustrates that the average time delay between social audit findings and the implementation of corrective actions. In the 2022/2023 financial year, suppliers on average took 57 days to implement corrective actions. This value has remained consistent throughout the 2023/2024 year and decreased to 52 days in the 2024/2025 year, which demonstrates the success of the SIZA audit follow-up process. The average days lapsed between the audit findings and corrective actions over the entire period was 52,5 days.

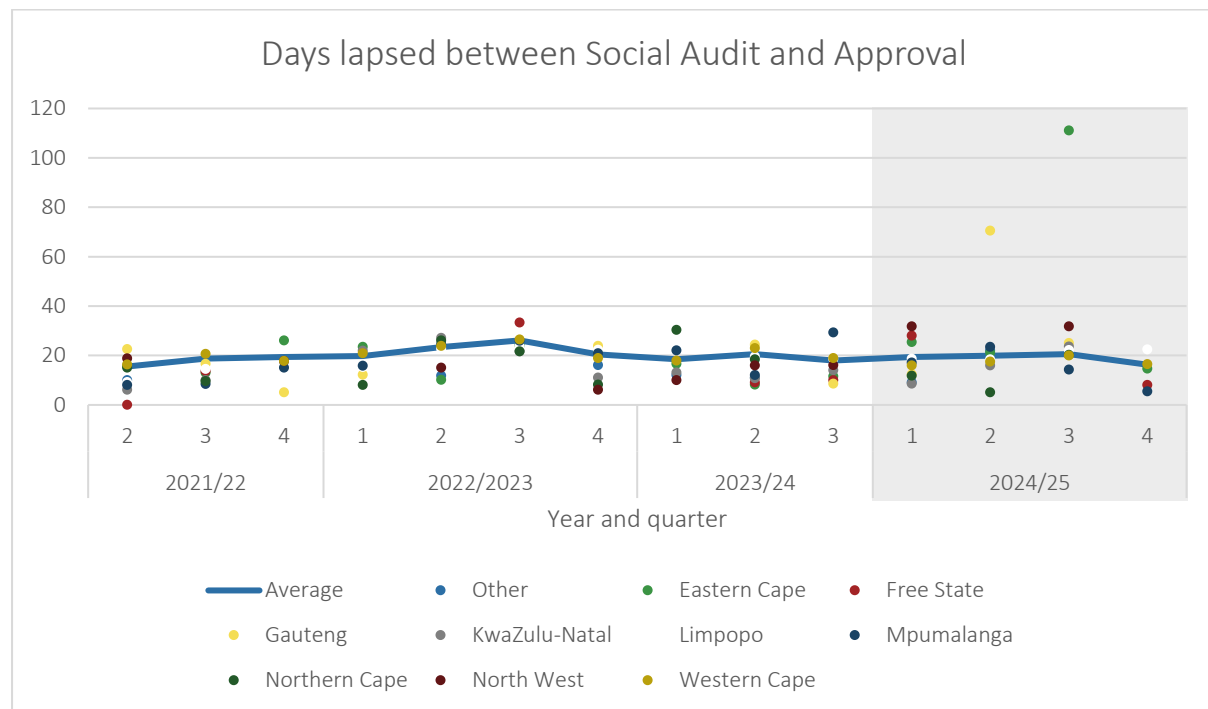


The Western Cape has followed the national trend since the 2022/2023 year. This suggests that the industry, at both a national and provincial level, has an appetite for social compliance and is embracing continual improvement in a timely manner. A key driver of this increased efficiency is the fact the SIZA Audit Frequency Matrix ensures that no Audit Completion Letter is issued if all corrective actions for each finding are not closed out.

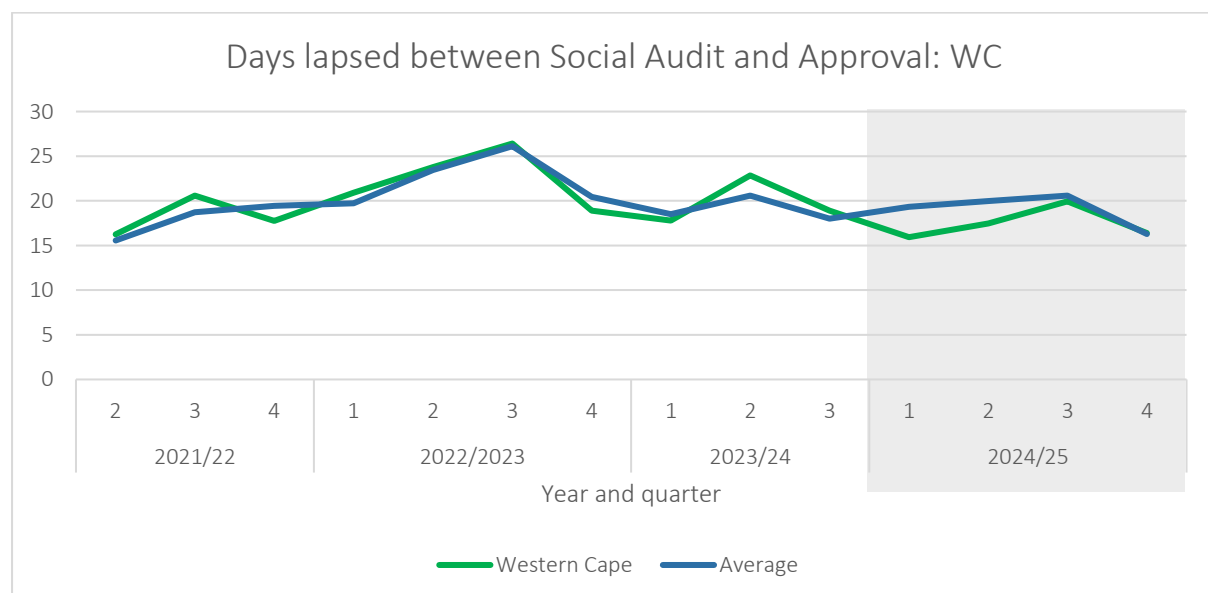


3.7. Time lapsed before audit approval

The graph below depicts the average number of days lapsed between the audit end date and approval dates. The average number of days between the audit and approval of the audit report, in the 2022/2023 year was 22 days. This decreased to 19 days in both the 2023/2024 and 2024/2025 years.



The Western Cape in particular, as illustrated in the below graph, is the main driver of the national average. In the 2024/2025 year, the average number of days between an audit start and approval date in the Western Cape was 17,44, which is slightly below the national average of 19,05 days.



4. COMMUNITY ENGAGEMENT BEYOND THE SOCIAL AND ENVIRONMENTAL AUDIT

Auditing has been a catalyst for sustainable change in the global supply chain for several years by driving continuous improvement. This has decreased the number of workplace non-compliances raised during audits. Conducting audits on farms, packhouses, processing facilities, and workplaces in general has provided an objective measurement to benchmark progress. Yet, third-party auditing is not the only solution.

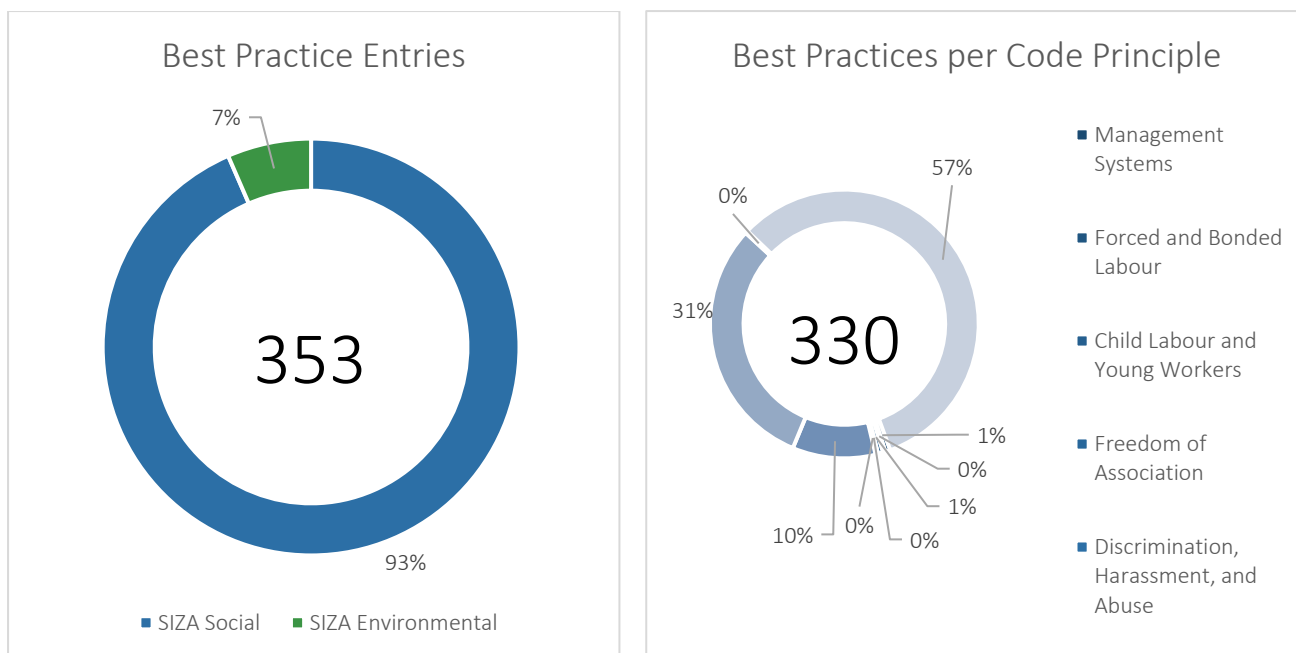
The SIZA Best Practice programme supports SIZA's requirements and drive to ensure businesses' commitment toward their community and incentivise best practice instead of just meeting minimum requirement. SIZA commenced this programme in 2018, giving suppliers the opportunity to showcase areas where they feel they have surpassed compliance, engage with their community, create value, and sustain practices beyond the audit process. Since the programme started, 353 best practices have been approved under this programme, of which 330 practices are related to the SIZA Social standard.

With this initiative, we aim to showcase best practices of producers and at the same time try to create a balanced view of ethical assurance practices in agriculture by highlighting the various community benefits and impacts achieved by agri-businesses. Suppliers' drive toward community engagement and having a positive impact on their neighbouring community, town, and area has been of great value. Some of the practices noted are:

- School support provided by producers to employees' children, sometimes also including on-farm schools and educational facilities.
- After care facilities and development programmes.
- Clinics and healthcare facilities onsite.
- Community health roadshows and educational days.
- Facilities made available for women and men from nearby communities to engage in crafts and art and contribute to producing products that in turn support their families.
- Pension funds and contributions to retirement annuities.
- Sport facilities and encouragement (proves very popular with teens and families on farms).
- Housing benefits (free housing on farm, employer provides/buys accommodation at nearby town for employee/family etc.).

The above is merely a highlight of some of the admirable practices offered by producers across South Africa. The importance of ensuring there is engagement with local communities is an embedded culture within South African agriculture that has survived over many decades and seems to increase with time. It is also worth noting that there are excellent programmes managed under the leadership of the different industry associations across provinces and other external NGOs.

To date, 330 Social (Ethical) and 23 Environmental Best Practices have been approved on MySIZA. For the Western Cape the total Best Practices are 176 for Social (Ethical) and 16 for Environmental.



It is clear that the majority of the best practices are approved under two principal codes namely: Health and Safety, and Wages, Benefits and Terms of Employment. These two principal codes also carry the majority of the non-conformances raised during third-party audits. This balance provides a good understanding that although some businesses receive non-conformances, these areas of improvement are also focus areas for progress by many businesses.

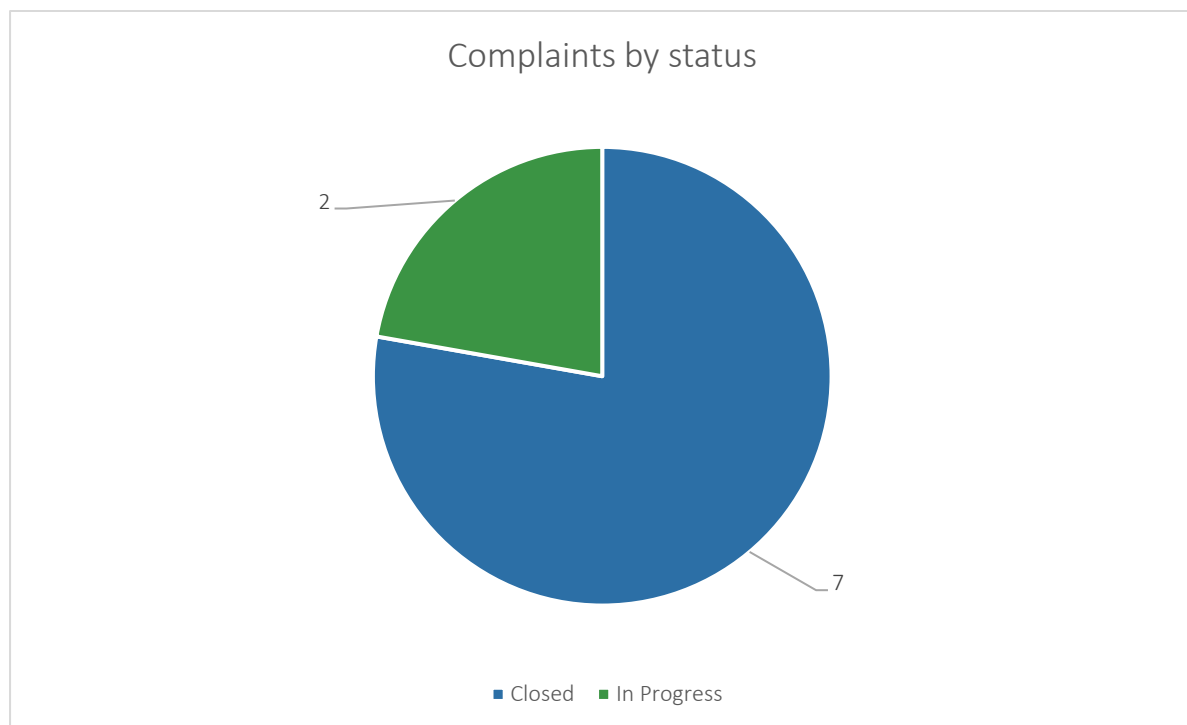
The Best Practices in each category can be summarised as follows:

1. Forced and Bonded Labour
 - Formal training to all employees by renowned training programmes.
2. Child Labour and Young Workers
 - Educational upliftment programmes to employees' children.
 - School holiday and educational programmes.
3. Freedom of Association
 - Social development programmes for all employees, including exposure to association or trade unions, employee forums and learnings.
4. Discrimination, Harassment and Abuse
 - Implemented the When Grievances Becomes Good Practice training programme within the business and included all employees.
 - Additional social development by social workers on site.
5. Health and Safety
 - Clinic on site and other health-related services offered to employees and their families.
 - Availability to community health centres or onsite health services to employees.
 - COVID-testing facilities on site.
 - Education and training facilities.
 - Aftercare and crèche facilities offered to employees' children on site.
6. Wages, Benefits and Terms of Employment
 - Annual Christmas and production bonus offered to employees.
 - Seasonal performance bonus payments to employees who exceed targets.
 - Free transport and housing offered to occupants and employees.
 - Pension and provident funds offered to workers.
7. Working Hours
 - Paid time off for targets achieved to employees during and after the season.

5. THE SIZA VOICE FOR ALL PROGRAMME

A new development this quarter has been the introduction of the SIZA Voice for All programme, ensuring the supply chain's compliance with the European Union's Corporate Sustainability Due Diligence Directives (CSDDD). This programme serves as a centralised grievance system for the entire South African agricultural industry and to any interested party within the value-chain. This means that any individual may utilise this programme and can receive guidance and assistance. The programme offers multiple grievance reporting methods, such as a complaints system on the MySIZA platform, direct email, a toll-free hotline, WhatsApp, in-person visits, or via social media. When a complaint is received, the matter will be mediated through a range of channels, including internal resolution, independent investigation, or referral to external experts. This mechanism benefits the industry by derisking the supply chain and increasing transparency to buyers.

In the most recent quarter, nine complaints have been communicated through this programme, of which seven have been closed and two are in progress. The Western Cape in particular received four of these complaints. All complaints that were resolved were done so without the need for any external remedy solutions.



6. GLOBAL MARKET ENGAGEMENT AND SIZA ACCEPTANCE ACROSS MARKETS

SIZA has positioned itself to be the preferred standard for suppliers from South Africa. It is in line with the SIZA vision to avoid audit duplication where possible and to save time and cost, whilst still being able to identify areas of risk in the industry and work towards the goal of continuous improvement.

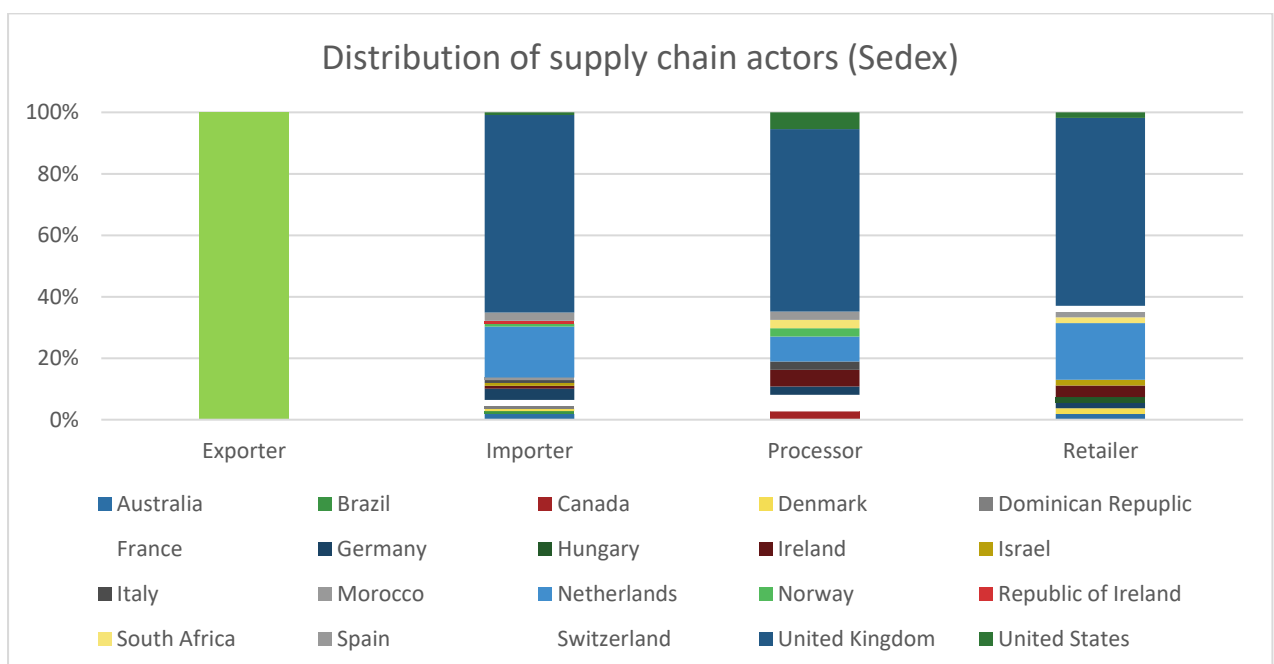
Market acceptance is therefore one of the key measurable objectives to monitor growth but also to maintain the current acceptance throughout the world. Currently SIZA provides supplier information when suppliers give SIZA permission to do so. Visibility on audit data and standards information are provided via four platforms at this stage.

- via the *MySIZA* Data platform
- via the Sedex Data Platform
- via a link on the GLOBALG.A.P. database
- via ITC Map

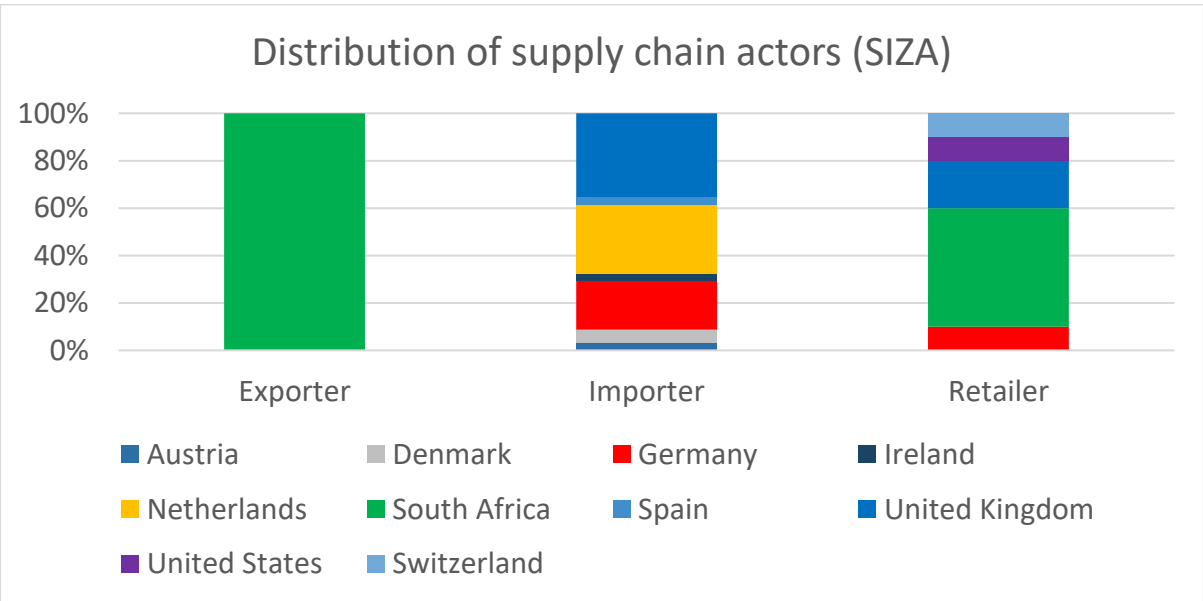
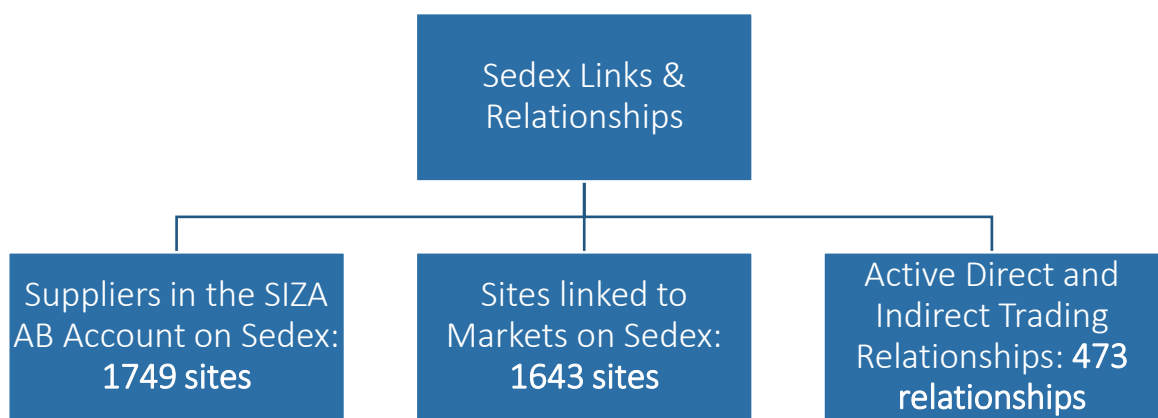
SIZA's acceptance has also grown in terms of businesses and industries that accept SIZA audits and recognise primary subscribers' ethical and environmental performance against the SIZA standard. Current acceptance is through Exporters, Importers, Retailers, Manufacturing/Processing Facilities, Storage/Distribution Facilities, Wholesalers and Restaurants. The acceptance of these markets and buyers are largely dependent on the various benchmarks undergone by SIZA where the Standard and the audit process is compared against the international standards, conventions, and legislation. This requires that the SIZA Standard is updated, and as per SIZA's audit process and methodology, the SIZA Social and Environmental Standard are reviewed every 3-year cycle. The new SIZA Standards were published in October 2023. This process provided an opportunity for SIZA and the South African industry to ensure that the standards are aligned with legislation and market requirements. This process included a technical review panel, which consisted of exporters, importers, retailers, industry experts, producers, and legal experts, ensuring a thorough process.

SIZA will continue to monitor the market growth and continuously engage with new markets for further acceptance. Across the four different platforms, SIZA is accepted by 345 businesses that operate around the globe. Below is a table showing the number of businesses per country that we are aware of which accept and support SIZA.

Country of SIZA Recognition	Number of Buyers Accepting SIZA Programme
Australia	3
Austria	1
Brazil	1
Canada	1
China	1
Denmark	4
Dominican Republic	1
France	4
Germany	18
Hungry	1
Ireland	6
Israel	2
Italy	2
Morocco	1
Netherlands	41
Norway	2
Republic of Ireland	1
South Africa	124
Spain	6
Sweden	6
Switzerland	2
United Kingdom	140
United States	5
Total Markets:	<u>355</u>



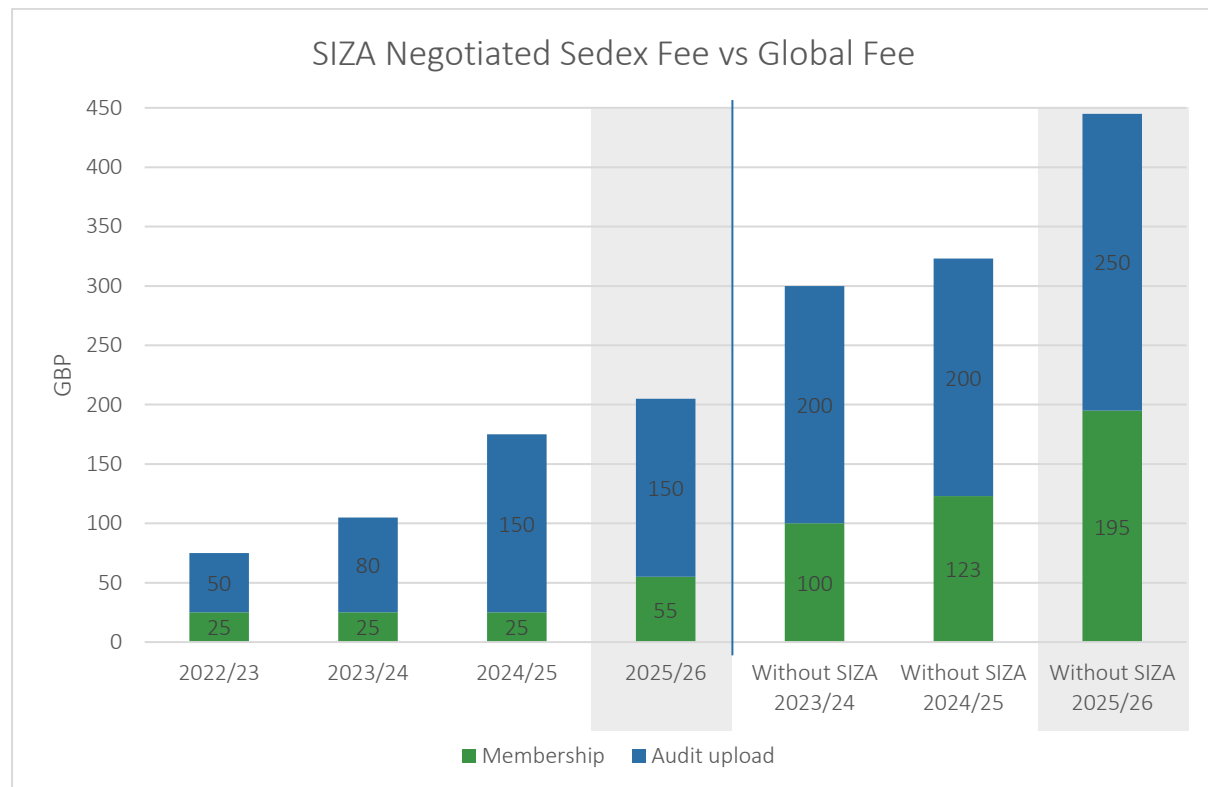
Out of SIZA’s total subscriptions, 1 752 are represented as suppliers in the SIZA AB account on Sedex. Each supplier can be linked to markets on the Sedex platform, and SIZA manages this visibility on behalf of its subscribers who require Sedex visibility. Currently 1 643 sites are linked to 493 active direct and indirect trading relationships.



As SIZA continues to gain market acceptance across the globe, it remains important for subscribers and audit companies to pay attention to specific requirements from certain retailers and buyers. As compliance requirements grow across the globe, it remains crucial that SIZA continues its efforts alongside the South African industry to maintain market acceptance and recognition to better drive a cost, and time effective solution for the agricultural industry.

6.1. Cost-Benefit of Sedex Visibility Cost for SIZA uploads

In 2018 SIZA negotiated a special rate with Sedex to upload SIZA audits to the Sedex platform. Sedex makes a clear distinction between SMETA audits and any other audit that are uploaded to Sedex. During the negotiations Sedex agreed that due to the equivalence agreement between SIZA and Sedex SIZA can therefore be treated as an equivalent partner to the SMETA audit. Therefore, the agreed rates that SIZA will have to pay was and still is lower than what a subscriber would have to pay for the visibility of a SMETA audit.



The graph above illustrates the escalation of the negotiated fee between SIZA and Sedex between 2022 and 2026, compared to the global Sedex fees (applicable to all subscribers outside of the SIZA agreement with Sedex) for the upload of a SIZA audit and subscription costs. It is clear that during last four financial years Sedex has increased the Audit upload costs drastically not only for SIZA but for all SMETA audits around the globe too. The increase of audit upload amounts to £100 over the last four years, and therefore, is an increase in cost of 200% since 2022. SIZA's subscription fee with Sedex has also increased over the last four financial years by 120% from £25 to £55. Even with these drastic fee increases, the SIZA negotiated fee remains significantly lower than global Sedex fees. When comparing subscription fees in the 2025/26 financial year, the SIZA negotiated fee for subscription is 71,79% lower than other global Sedex subscribers pay. When looking at the fees for audit uploads, the upload cost is 40,00% lower than the cost that other global subscribers are paying for a SMETA audit upload

7. LOCAL ENGAGEMENT AND SOCIAL (ETHICAL) CAPACITY BUILDING INITIATIVES

Through various training events, SIZA aims to assist subscribers with understanding the various requirements of the SIZA Social and Environmental Standards, in addition to helping subscribers in their preparations for their third-party audits. The training, in combination with in-person SIZA In-Between Monitoring Site Visits, forms the foundation of the Capacity Building initiatives undertaken by SIZA. SIZA training is either conducted in-person or online via a webinar platform throughout the year and focuses on various topics, as seen below:

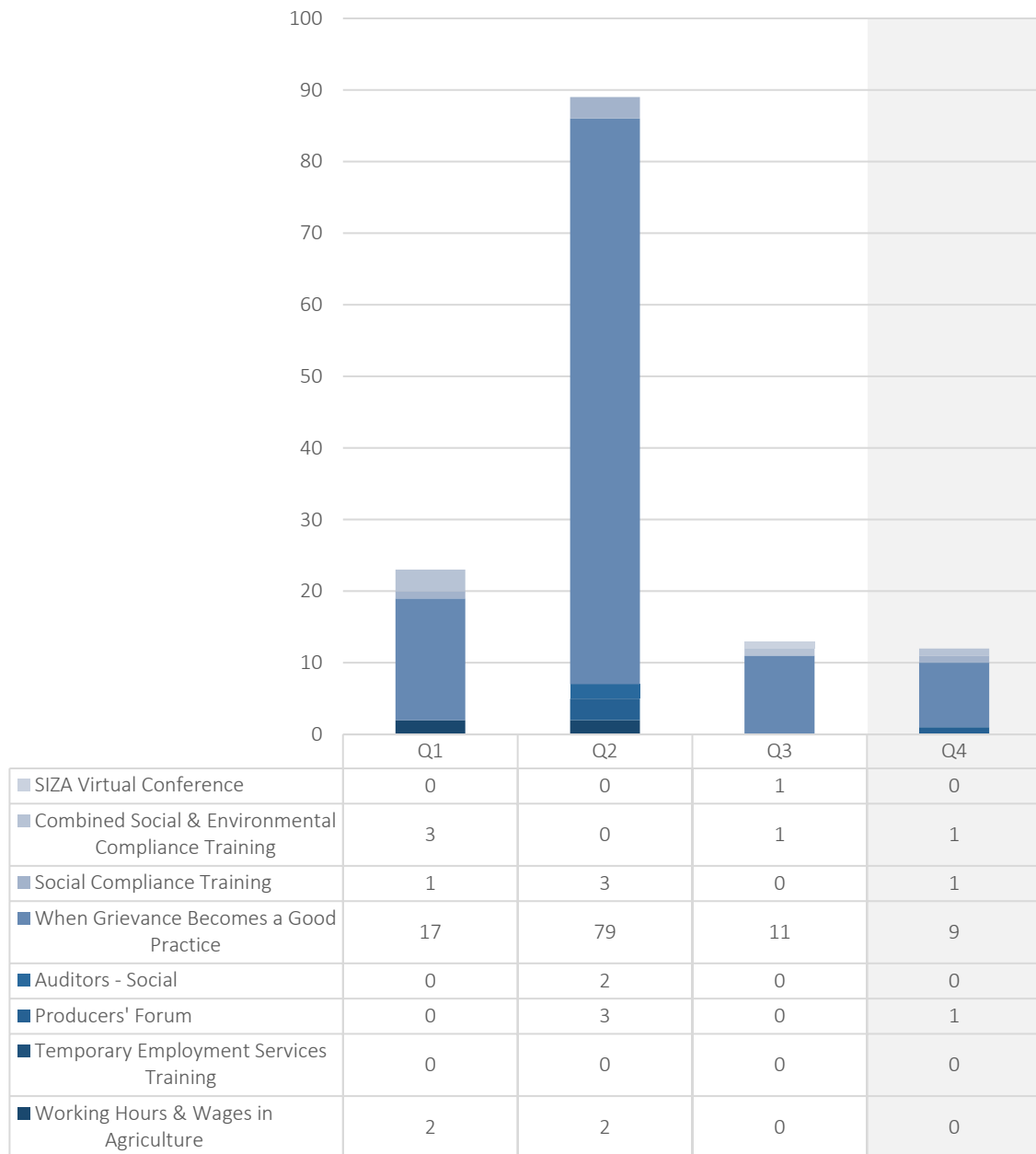
Subscriber training

- Social Compliance
- When Grievance becomes a Good Practice
- Understanding Audit Findings
- Environmental Compliance
- Environmental Legislation
- Digital Recordkeeping
- MySIZA Platform navigation
- SIZA/LEAF Marque Producer Session
- SIZA Virtual Conference

Auditors

- Social Standard
- Environmental Standard

Social Training Events per Period



Social Training Attendance per Period

