



SIZA MONITORING & EVALUATION REPORT ON SOCIAL AND ENVIRONMENTAL PRACTICES

Quarterly Update for Q4 2025/2026

1 January 2026 – 31 March 2026

In cooperation with the Western Cape Department of Agriculture



CONTENTS

INTRODUCTION

- Purpose of the Report
- Overview of the SIZA audit and monitoring methodology

Pages

1. SUBSCRIPTION LANDSCAPE	5 - 25
1.1. <u>Subscription Overview</u>	5 - 9
• Active Primary Subscriptions • Active Secondary and Tertiary Subscriptions • Sedex and GLOBALG.A.P. Registrations • Total MySIZA Registrations and Users	
1.2. <u>Distribution & Trends</u>	9 - 12
• Distribution of Active Primary Subscriptions • Distribution of Active Primary Sites • Active Primary Subscriptions by levels	
1.3. <u>Subscription Dynamics</u>	12 - 13
• New Subscriptions Registered per Quarter Over Time	
1.4. <u>Sector & Commodity Analysis</u>	14 - 19
• Site Subscriptions per Commodity • Commodity Statistics in General • Commodity Statistics: Subscribers & Audits • Commodity Statistics: SIZA & Industry Comparison • Commodity Statistics: Hectarage & Sites • Commodity Statistics: Workers	
1.5. <u>Workforce & Wages Overview</u>	20 - 23
• Worker Summary • Increase in Wages over Time	
2. SELF-ASSESSMENT QUESTIONNAIRE ANALYSIS	23 - 26
• The SAQ Process • SAQ Scoring • WIETA Collaboration & Combined Audit Process • LEAF-Marque Collaboration	
3. AUDIT EXECUTION & FINDINGS	26 - 38
3.1. <u>Audit Activity Overview</u>	26 - 30

• Social & Environmental Audits per Period • Audits Status • Audits per Frequency Risk Category	
3.2. <u>Non-Conformance (NC's) Trends for the period 1 April – 30 June 2025</u>	30 - 38
• Non-Conformances Raised • Social & Environmental NCs per Category • Risk Category Distribution: SIZA Social and Environmental • Avg. Findings per Social & Environmental Audit	
4. COMPLIANCE IMPROVEMENT	39 - 48
4.1. <u>Implementation of Improvements</u>	39 - 45
• Corrective Actions Taken • Time Elapsed Before Corrective Actions are closed • Time Elapsed Before Audit Approval and Completion	
4.2. <u>Auditor Capacity & Growth</u>	45 - 46
4.3. <u>Between-Audit Monitoring</u>	46 - 47
• Between Audit Monitoring Programme • Verifications per Period	
5. SIZATRACK360 (<i>Sustainability data and digital tracking</i>)	47 - 53
• SIZATrack360 Subscriptions • Carbon Footprint Calculations Reporting • Water-Use Efficiency • Waste Management • Nitrogen-Based Fertiliser Usage	
6. CAPACITY BUILDING & TRAINING	54 - 55

INTRODUCTION

Purpose of the Report

The Sustainability Initiative of South Africa (SIZA) provides a platform for the agricultural industry to promote ethical labour practices and environmental stewardship. The programme supports compliance with local legislation while encouraging continuous improvement beyond legal requirements.

In addition to its established Social (Ethical) Standard, SIZA offers a comprehensive Environmental Standard. This standard helps suppliers align with environmental laws and global best practices, focusing on four key areas: soil health, water management, energy and waste, and biodiversity. To support the 3-year audit validity period, SIZA provides various between-audit monitoring activities, such as the SIZA CARES and Social Site visit programme, to maintain audit status and support ongoing improvement between audit periods.

The SIZATrack360 digital recordkeeping programme enables suppliers to track performance indicators such as water and energy use, carbon emissions, and waste output. The programme aids in setting and achieving sustainability goals through standardised monitoring, with the aim of calculating a carbon footprint through third-party greenhouse gas specialists.

The Monitoring & Evaluation (M&E) quarterly report provides insights into subscription trends, audit outcomes, environmental performance, and risk factors. It supports data-driven strategies to strengthen sustainability across the South African agricultural sector and identify possible gaps that can be addressed through capacity-building initiatives. SIZA compiled the M&E reports in cooperation with the Western Cape Department of Agriculture to monitor and evaluate continuous improvement. Therefore, the report is derived from the four quarterly periods as specified by the Western Cape Department of Agriculture's financial requirements, 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

Overview of the SIZA Audit Process and Monitoring Methodology

The graph on the right illustrates the SIZA Auditing Process and Monitoring Methodology. Suppliers begin by registering or renewing with SIZA subscription, after which they are expected to complete/update their self-assessment questionnaire (SAQ). After the SAQ has been completed and approved, suppliers may book an audit on the approved SAQ. The third-party audit takes place, after which the supplier is expected to close out their corrective actions. The supplier may also use an independent dispute process if they disagree with any findings within the audit or a remedy solution process to complete their corrective actions. Once the auditor has signed off on all corrective actions, the supplier is issued their SIZA Audit Completion Letter. SIZA has also invested in a range of interim audit monitoring processes to uphold the validity of the three-year audit cycle. The MySIZA platform not only delivers high-quality data but also provides in-depth risk reports for buyers, ensuring transparency through enhanced visibility and traceability.



1. SUBSCRIPTION LANDSCAPE

1.1 Subscription Overview

SIZA subscriptions are structured into levels to align functionalities with the specific needs of various operational types, allowing sites to register at the level that best represents their activities; this structure supports not only suppliers but also packhouses and processing facilities, while secondary subscriptions (Levels 4–6), such as buyers, can be linked to primary suppliers (Levels 1–3) to promote transparency across the value chain, maintain confidentiality, and safeguard data. The subscription levels apply equally to the Social (Ethical) and Environmental modules, as they operate as separate standards.

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

- | | |
|-----------------------|--|
| Levels 1a – 3: | Primary subscribers , including producers, packhouses, processing facilities, smallholders/emerging growers, temporary employment services, and multisites. |
| Levels 4 – 6: | Secondary subscribers , including export agents, import agents, retailers, minor industry associations, major industry associations, and non-profit organisations. |
| Levels 7 – 8: | Tertiary subscribers , including social audit firms, environmental audit firms, independent greenhouse gas specialists, training service providers, consultants, and remedy programmes. |

For more detailed information regarding the SIZA subscription levels, please refer to the 2025 – 2026 SIZA Subscription Cost Guidelines: <https://siza.co.za/wp-content/uploads/Subscription-fees-2025-2026.pdf>.

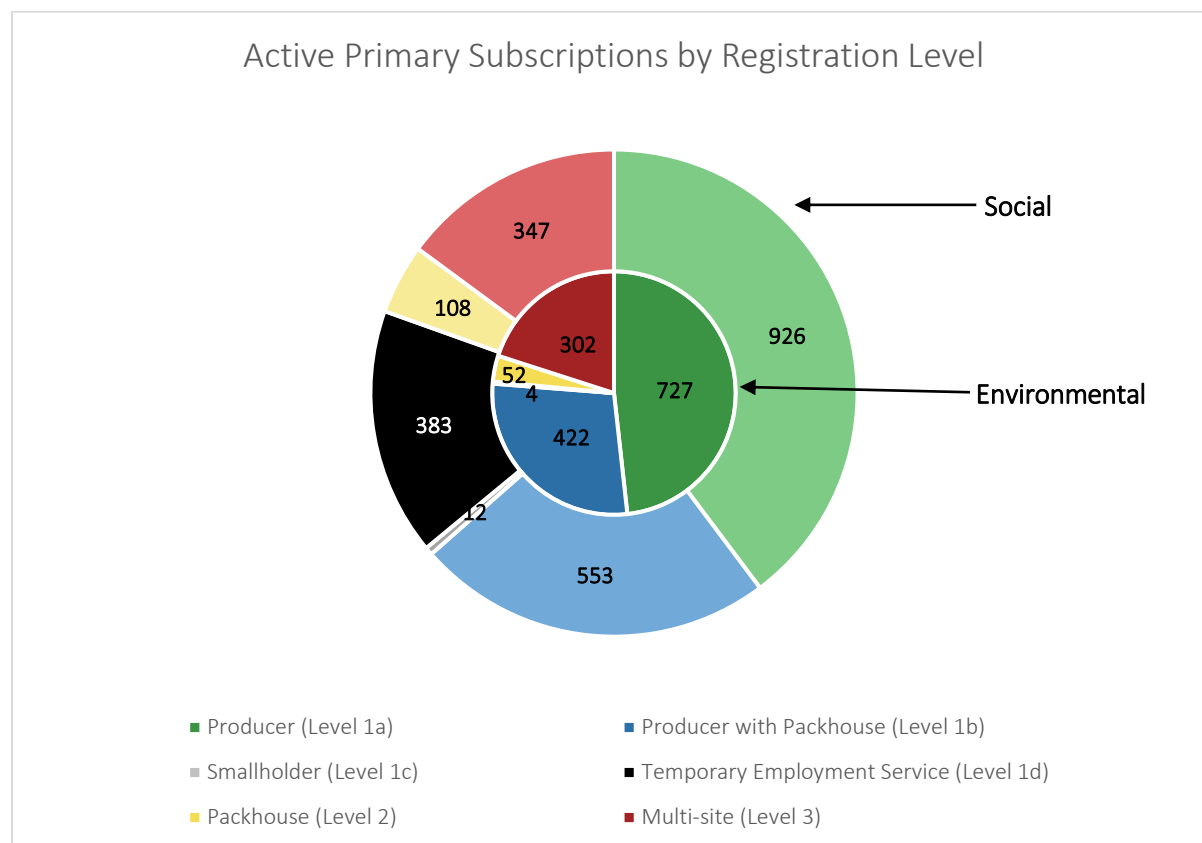
From the SIZA Subscription Cost Guidelines above, it is important to note that a “site” refers to an agricultural production or processing facility, characterised by permanent infrastructure supporting production and/or packing activities warranting a permanent workforce and clear indication, either independently or within a group, as a distinct production unit with its management structure.

It has become a trend over the last few years that smaller farms are being sold to bigger groups into multisites. Therefore, although the number of subscribers has somewhat declined, the total hectareage remains the same or even shows growth.

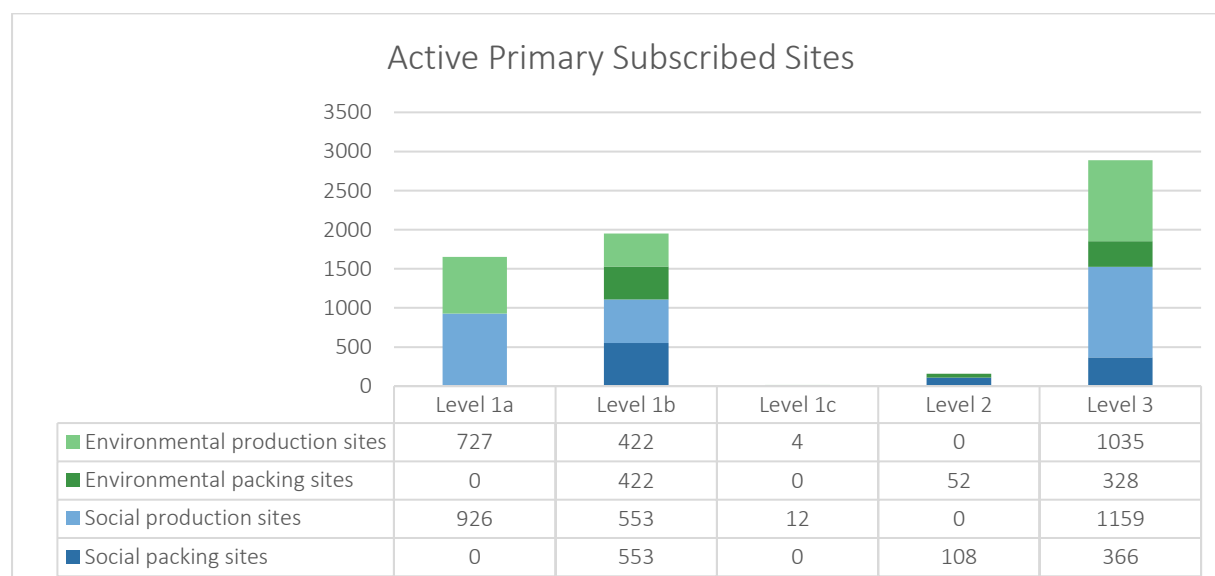
Subscriptions for the SIZA Environmental module have generally increased due to market requirements for proof of sustainability practices over the past several years. Because of this, SIZA has become the preferred standard for Social (Ethical) and Environmental compliance over the past 10 years.

Active Primary Subscriptions

For both Social and Environmental subscriptions, Level 1a suppliers represent the largest share of active primary subscriptions—39,76% and 48,24% respectively—followed by Level 1b suppliers at 23,74% (Social) and 28,00% (Environmental), Temporary Employment Services at 16,44% (Social only), and multisite operations at 14,90% (Social) and 20,04% (Environmental).



A total of 3 677 sites are registered under the Social module, comprising 2 650 production sites and 1 027 packing sites. Most fall under Level 3 (1 525 sites—1 159 production and 336 packing) and Level 1b (1 106 sites—553 production and 553 packing). Similarly, 2 990 sites are registered under the Environmental module, including 2 188 production and 802 packing sites, with most falling under Level 3 (1 363 sites—1 035 production and 328 packing) and Level 1b (844 sites—422 production and 422 packing).

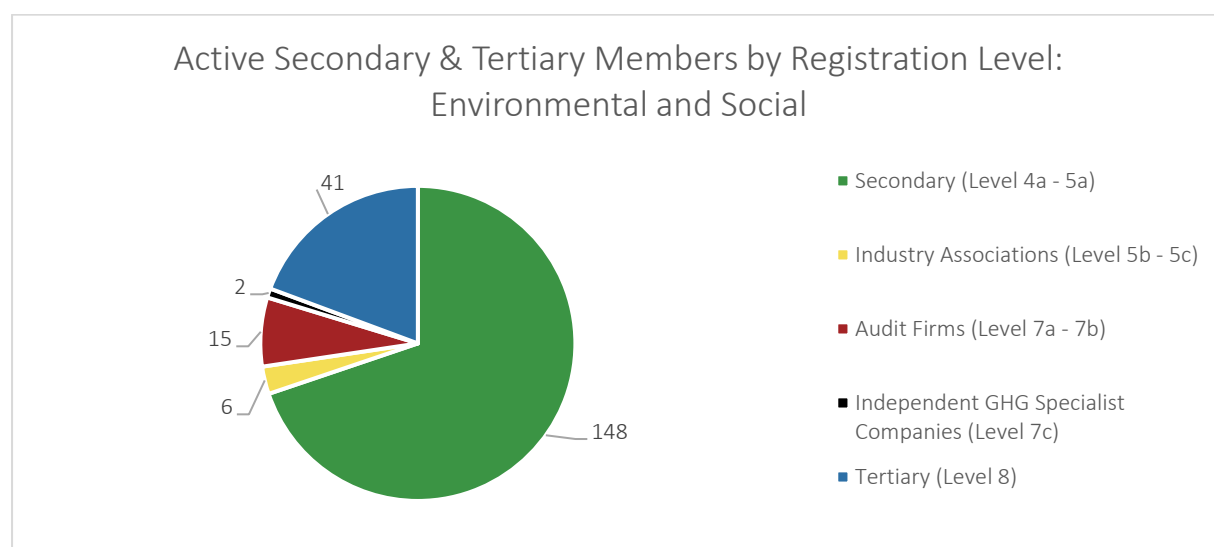


Active Secondary and Tertiary Subscriptions

The MySIZA platform serves as a risk management programme for suppliers, buyers, and other stakeholders. It enables secondary subscribers—such as exporters, importers, retailers, and industry associations—to evaluate and monitor the compliance status of their linked suppliers across the Social and Environmental modules.

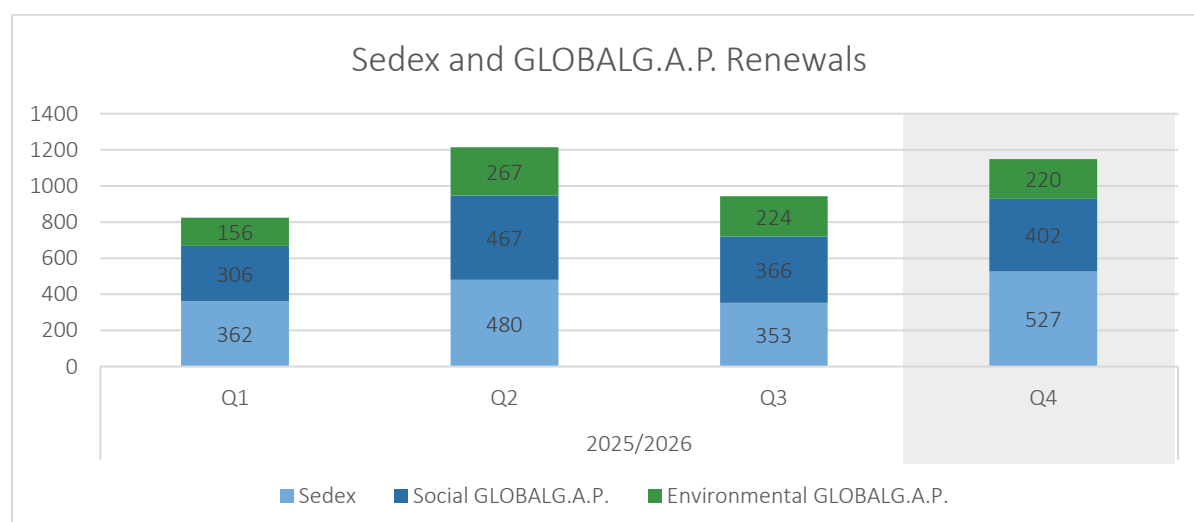
Currently, 154 secondary (including exporters, importers, retailers, and industry associations) and 58 tertiary subscribers (including audit firms, consultants, and remedy providers) are registered on the MySIZA platform.

In addition, SIZA shares data through the Sedex and the GLOBALG.A.P. platforms, enhancing global visibility and facilitating numerous buyer connections. Although difficult to quantify precisely, it is estimated that, through these combined platforms, SIZA is actively engaged with and accepted by over 500 businesses worldwide. If visibility links on the MySIZA platform are calculated, this adds up to 31 051 links between SIZA suppliers and direct and indirect buyers globally (not accounting for GLOBALG.A.P. and Sedex links).



Sedex and GLOBALG.A.P. Registrations

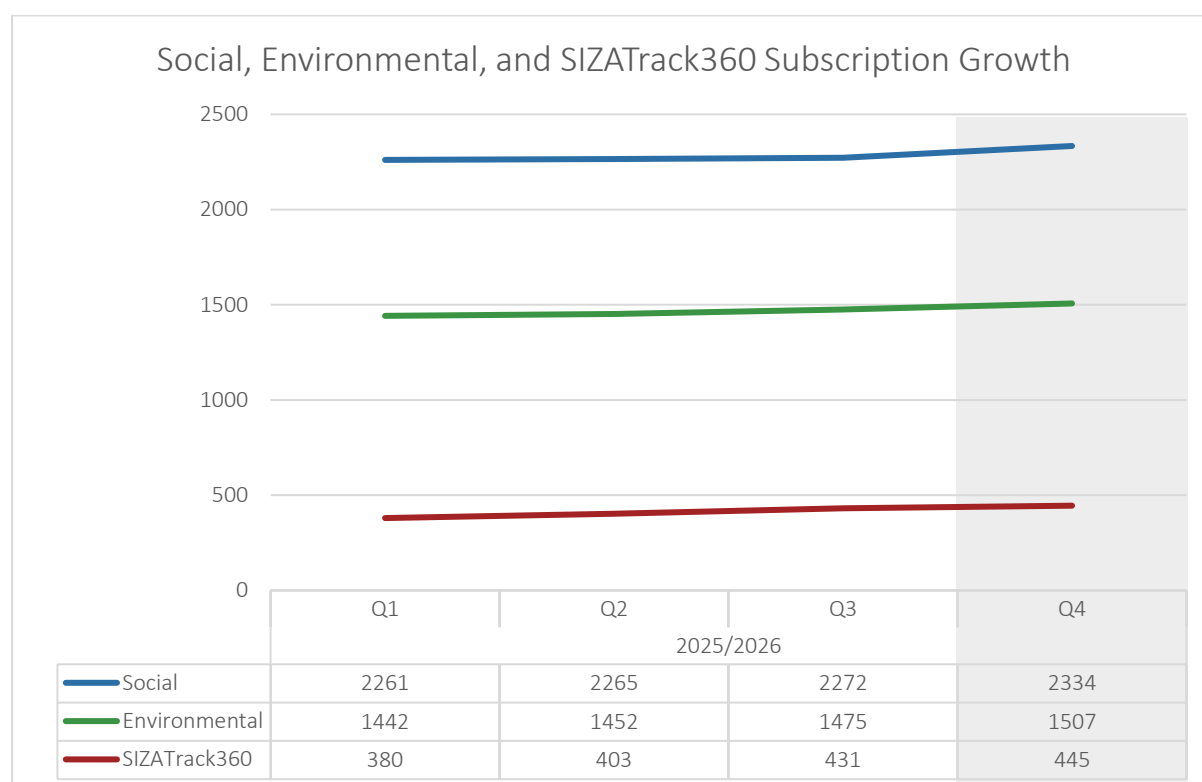
SIZA's vision is to provide a cost-effective compliance solution for the South African agricultural industry by partnering with global platforms to ensure supply chain visibility and traceability, offering a user-paid service to capture and transfer audit data to Sedex and GLOBALG.A.P., where, in the most recent reporting period, 527 Sedex, 402 Social GLOBALG.A.P., and 220 Environmental GLOBALG.A.P. subscribers renewed their visibility—commodity seasonality, subscription patterns, and the consolidation of sites influence fluctuations in these numbers.



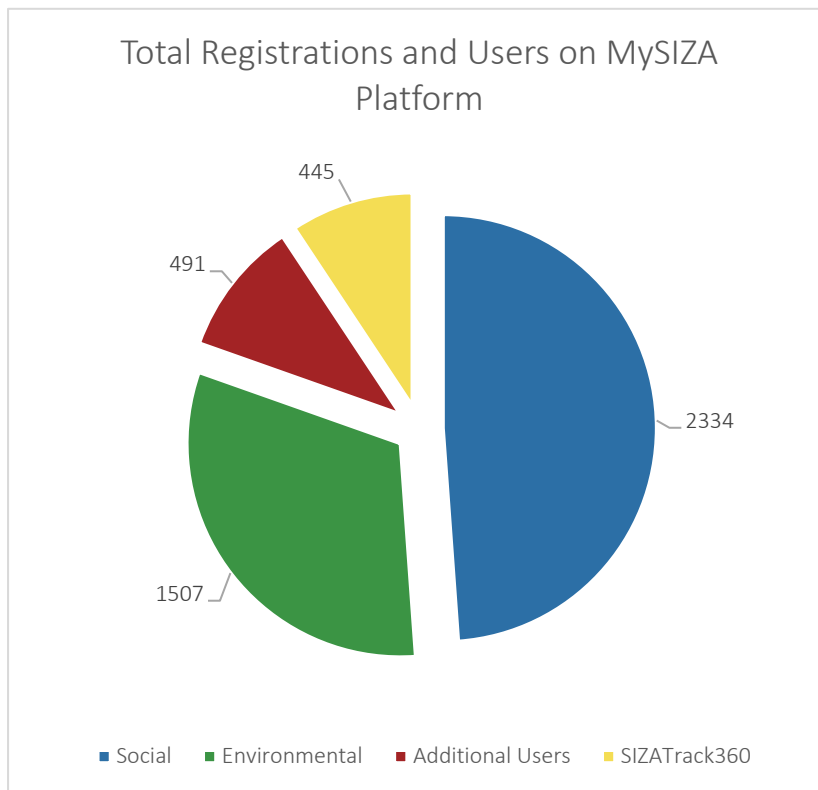
Total MySIZA Registrations and Users

Currently, there are 4 777 subscriptions on the MySIZA platform for all registration levels, including primary subscriptions of 2 658 production sites and 1 029 packing sites. This includes a total of 2 334 subscribers who are registered for the SIZA Social module, of which 830 are registered for the Social module only and the remaining 1 504 are registered for both the Social and Environmental modules. This covers a total of 3 677 sites subscribed under the SIZA Social module, of which 2 650 are production sites and 1 027 are packing sites. A total of 1 507 subscribers are registered for the Environmental module, of which eight are registered only for the Environmental module. This covers a total of 2 990 sites registered under the SIZA Environmental module, of which 2 188 are production sites and 802 are packing sites. A further 445 subscribers, comprising over 1 000 sites, have also registered for the SIZATrack360 digital recordkeeping programme.

Year to date, the total subscription base for the SIZA Social module has increased by 73 subscriptions (a 3,2% increase), whereas the SIZA Environmental module has increased by 65 subscriptions (a 4,5% increase), and SIZATrack360 subscriptions have also increased by 65 (a 17,1% increase).



To support SIZA's diverse subscription base and ensure effective monitoring and evaluation of compliance across the value chain, several additional user groups involved in the audit process and sustainability assurance are also registered on the MySIZA platform. These include 134 audit personnel, 156 secondary subscribers (such as exporters, importers, and retailers), 61 tertiary subscribers (including consultants and remedy solution providers), six environmental verification users, six GHG specialist users, and 128 secondary contacts (additional compliance personnel linked to primary profiles). These categories contribute a further 491 active users to the MySIZA platform.



One user can be linked to both the Social and Environmental modules and SIZATrack360. Therefore, to calculate the total module registrations and users, the 491 additional user profiles should be added to the total module registration subscriptions, including 2 334 Social registrations, 1 507 Environmental registrations, and 445 SIZATrack360 registrations. This brings the total registrations in terms of subscriptions to **4 777 users**.

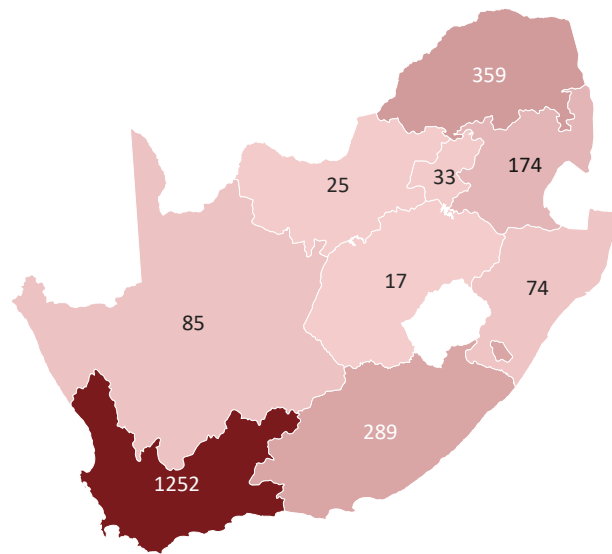
1.2 Distribution and Trends

Distribution of Active Primary Subscriptions

Of the 3 687 sites registered under either the Social or Environmental module, 3 644 sites are allocated within South Africa. The Western Cape is known for providing production stability within the agricultural sector and is one of South Africa's most important provinces for agricultural fruit exports. Therefore, the Western Cape records the highest total SIZA subscriptions across the nine provinces.

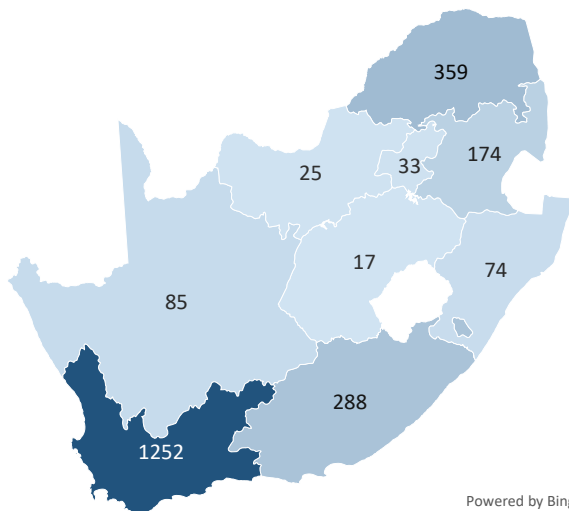
Currently the Western Cape is home to 1 252 Primary subscription accounts (1 252 of which are subscribed for the Social module, 885 of which are subscribed for the Environmental module), followed by Limpopo (359 total subscriptions; 359 of which are subscribed to the Social module, and 163 of which are subscribed to the Environmental module) and the Eastern Cape (289 total subscriptions; 288 of which are subscribed to the Social module, and 219 of which are subscribed to the Environmental module). The maps below illustrate the distribution of account subscriptions across South Africa.

Total Active Primary Subscription Distribution per Province



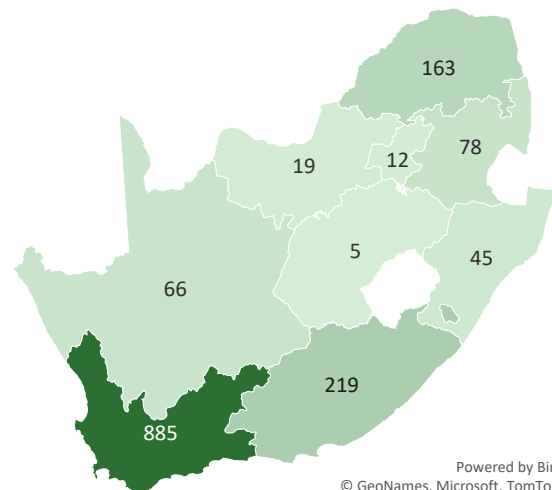
Powered by Bing
© GeoNames, Microsoft, TomTom

Active Primary Social Subscription Distribution per Province



Powered by Bing
© GeoNames, Microsoft, TomTom

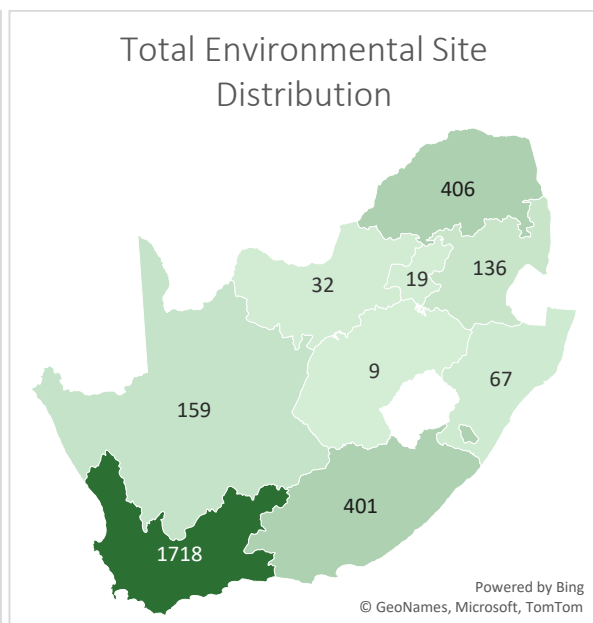
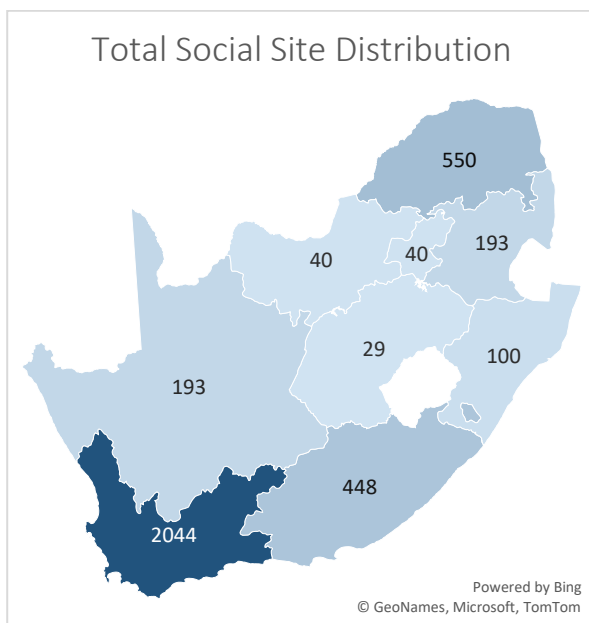
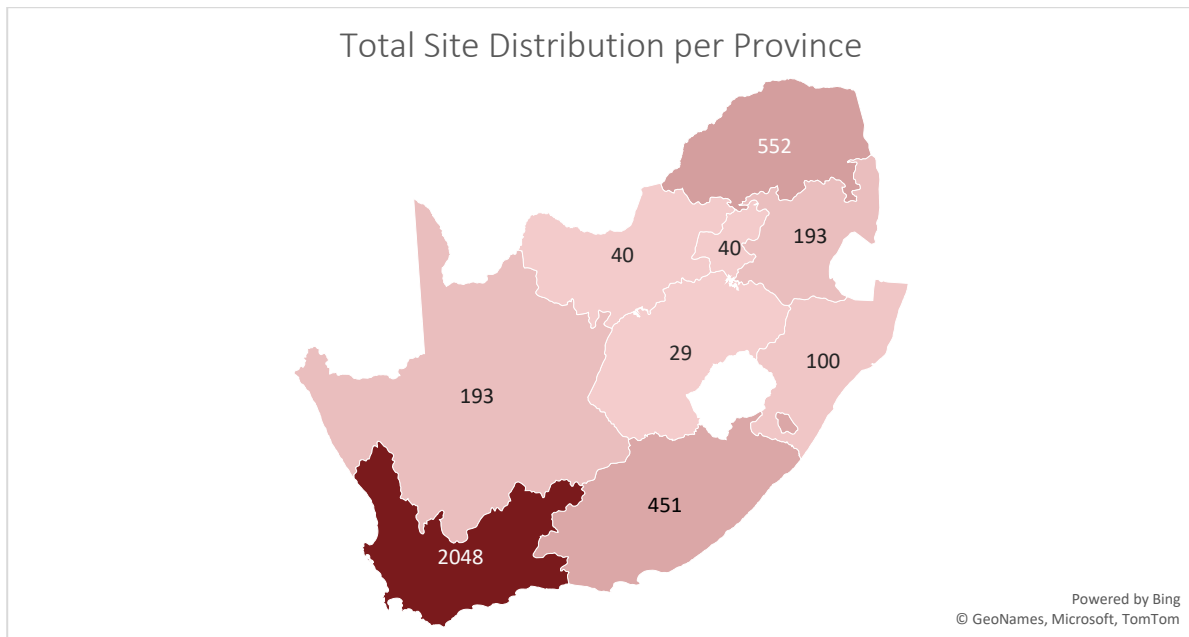
Active Primary Environmental Subscription Distribution per Province



Powered by Bing
© GeoNames, Microsoft, TomTom

Distribution of Active Primary Sites

The graph below depicts the distribution of primary production and packing sites (levels 1a – 3, not including Temporary Employment Services) per province for Q4 2025/2026. The Western Cape contains the largest number of sites (2 048, a 1,3% increase from last quarter), followed by Limpopo (552, a 2,4% increase) and the Eastern Cape (451, a 3,7% increase). The distribution of sites registered under the SIZA Social module largely follows the same trend, with the Western Cape accounting for the largest number of sites (2 044, a 1,2% increase from last quarter), followed by Limpopo (550, a 2,4% increase), and the Eastern Cape (448, a 3,3% increase). In terms of sites registered under the SIZA Environmental module, the Western Cape again accounts for the largest number of sites (1 718, a 2,1% increase), followed by Limpopo (406, a 8,3% increase) and the Eastern Cape (401, a 9% increase). Additionally, it became apparent that citrus commodities have grown significantly regarding SIZA subscriptions and now the Western Cape represents the majority of citrus suppliers and sites. In contrast, in the past, it used to be in the Eastern Cape.

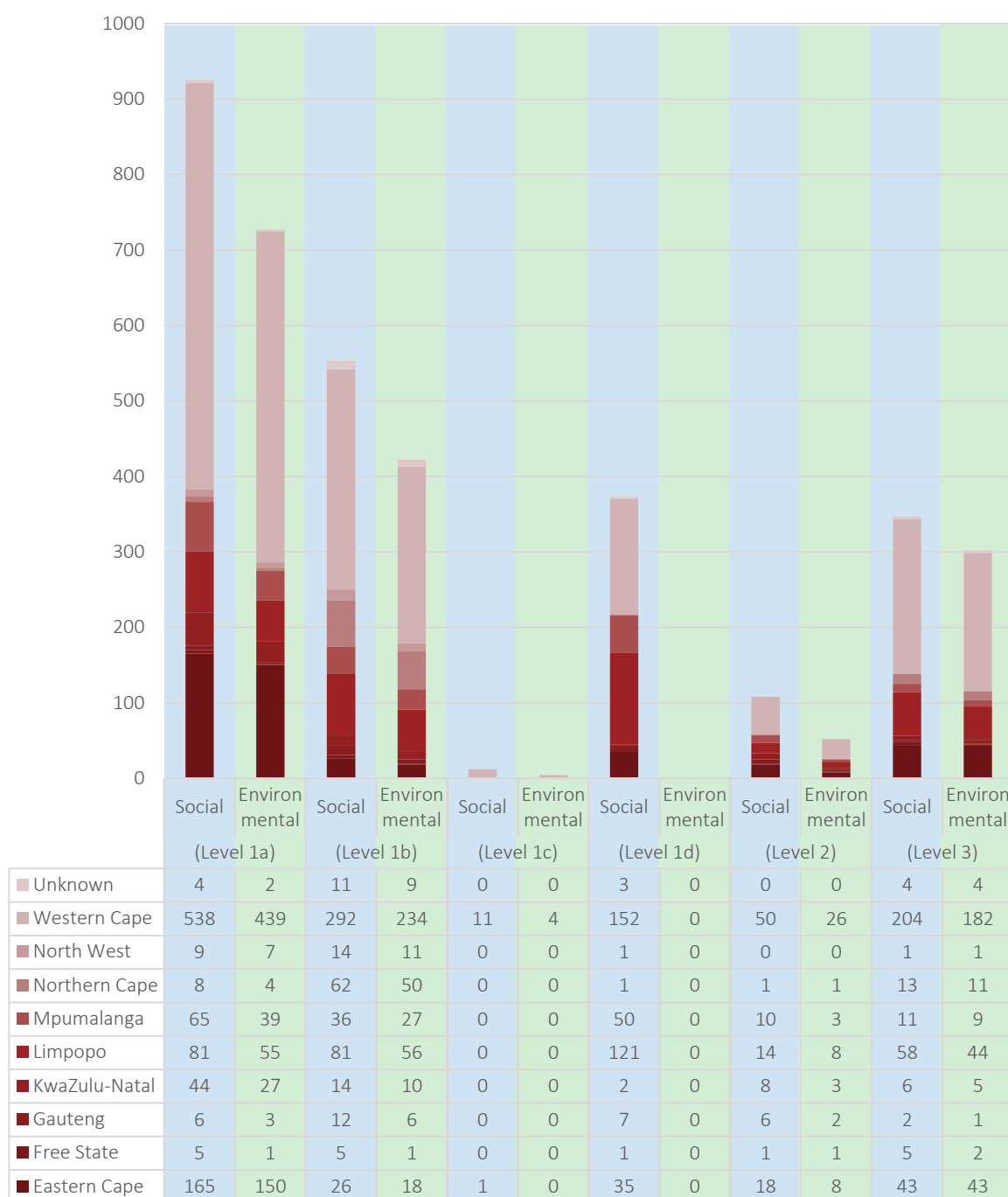


Active Primary Subscriptions by levels

Supplier (Level 1a) subscriptions continue to represent the largest share of both Social and Environmental primary subscriptions on the MySIZA platform. In the Western Cape—where fruit suppliers dominate—Level 1a Social subscriptions account for 43,14% of all such subscriptions, contributing to the province's total of 1247 primary Social registrations (the sum of all primary social registrations within the Western Cape as per the below graph).

Nationally, Level 1a makes up 49,6% of all Social primary subscriptions. Similarly, Level 1a subscribers in the Western Cape comprise 39,91% of Environmental primary subscriptions for the Environmental module, with 885 primary subscriptions registered in the province. At the national level, Level 1a also leads Environmental subscriptions, representing 43,14% of the total.

Active Primary subscriptions per Province by Registration Level



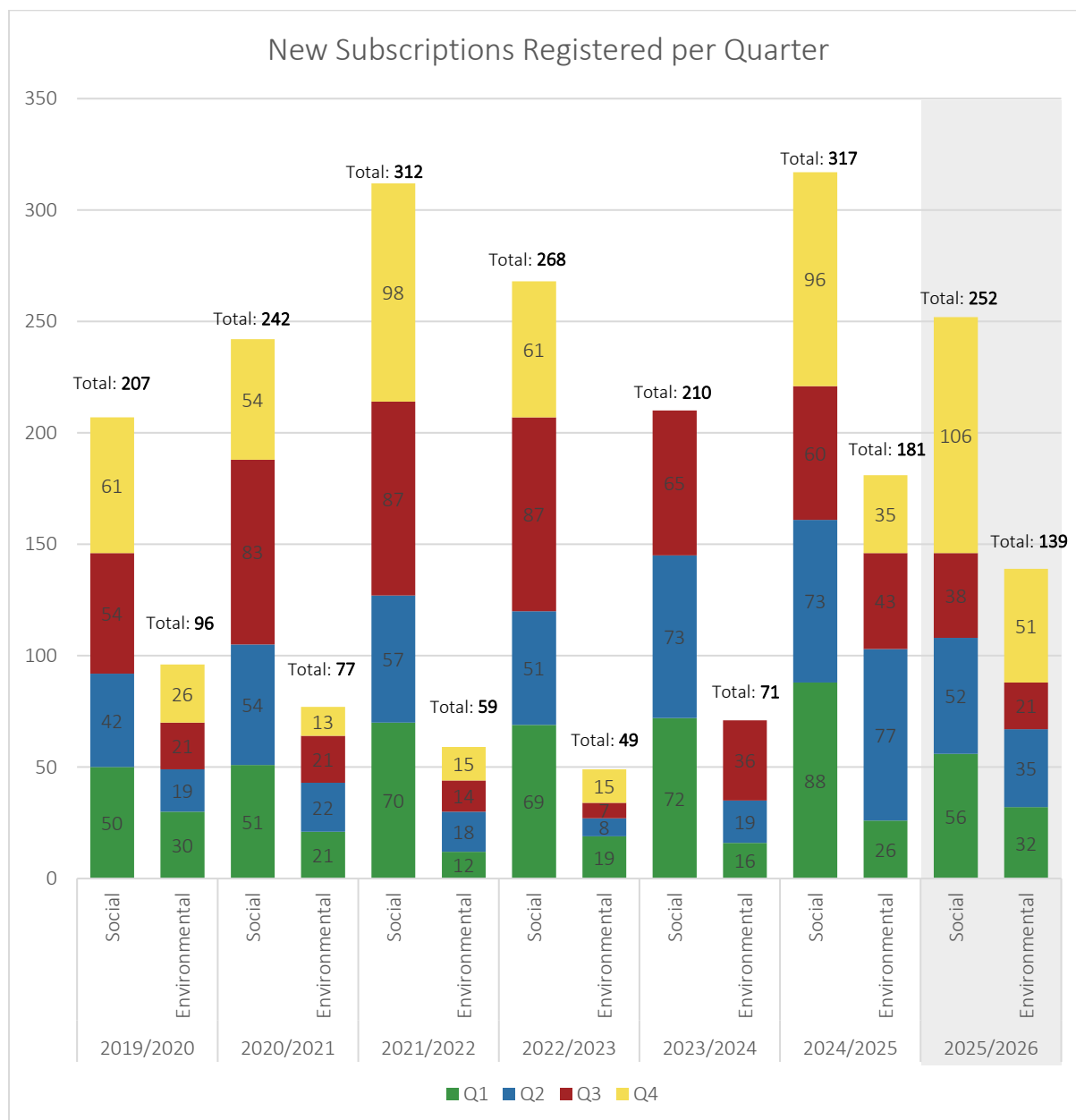
1.3 Subscription Dynamics

As a voluntary programme, SIZA is a preferred option for South African agricultural suppliers to drive social and environmental compliance. By offering both Standards to suppliers across South Africa, SIZA supports its vision of avoiding duplication and offering one standard per category to suppliers. The growth in Social and Environmental subscriptions since 2016 reflects this commitment, driven partly by SIZA's expansion into a multisector, agri-wide compliance programme, the increasing demand for social and environmental compliance from global buyers, and the programme's client-oriented service and support programmes.

New Subscriptions Registered per Quarter Over Time

Since 2016, 2 264 new primary subscribers have registered for the SIZA Social module, including 51 new registrations during the current reporting quarter. For the SIZA Environmental module, 727 new primary subscribers have registered since 2019, with 106 added this quarter.

The growth in Environmental subscriptions is primarily driven by increased buyer demand for verified environmental compliance, as well as the availability of cost-effective audit options—such as combined audits with GLOBALG.A.P. and the SIZA Environmental Standard with the LEAF Bolt-On — both of which have become preferred options for some South African suppliers. The growth in new subscriptions appears to have slowed in the most recent quarter; however, this is likely due to smaller single sites being incorporated into multisite operations, as we are unable to determine whether the total hectares have changed or are lower than in previous cycles.



1.4 Sector and Commodity Analysis

Site Subscriptions per Commodity

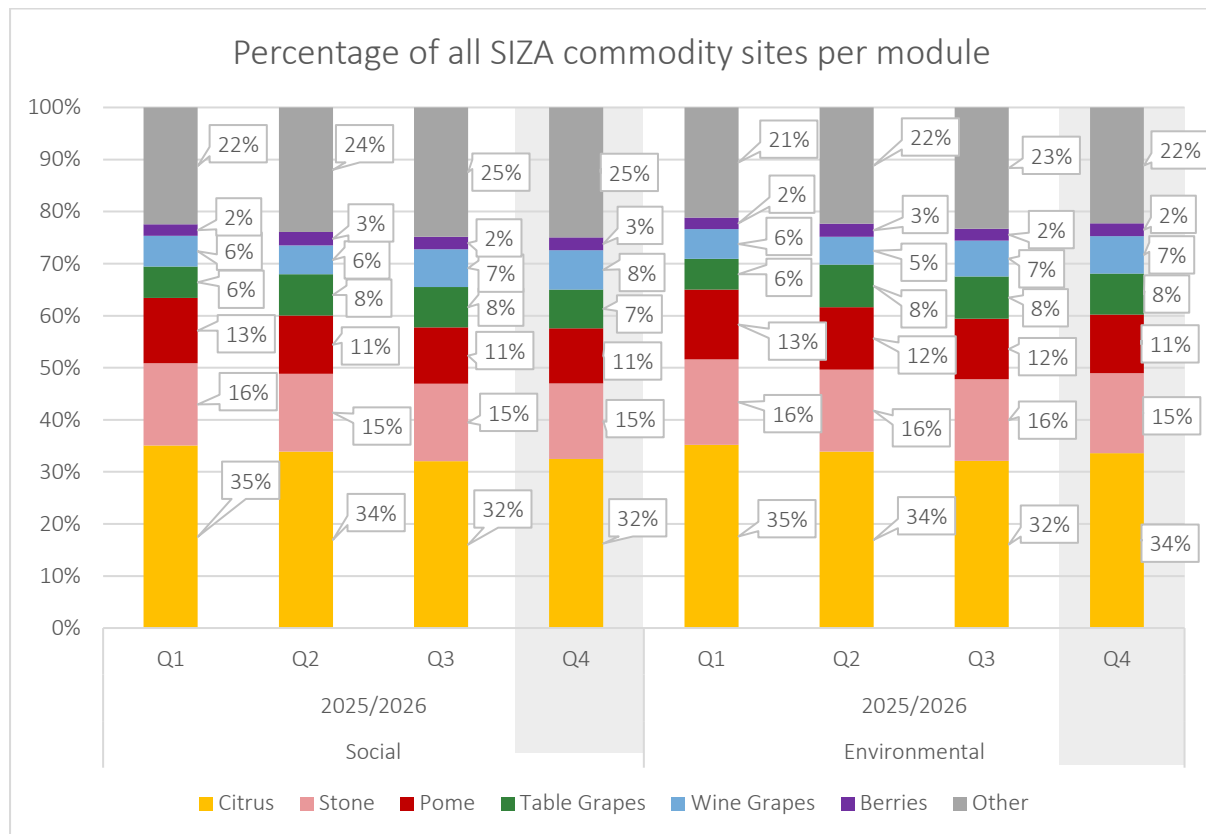
As SIZA is a multi-sector agricultural solution, the MySIZA platform allows for a detailed breakdown of commodities and sites (please refer to section 1.1 for the definition of a “site”). SIZA Social and Environmental subscribers have indicated their various commodities and sites on their SAQ. The table below outlines that the various commodities have been categorised with the total number of sites for each type. Here, it is important to note that there can be more than one category of commodity per site, and thus some sites are represented multiple times. For example, if a supplier grows Pome and Stone Fruit on a single site, that site will be represented under both “Pome Fruit” and “Stone Fruit”.

The four most prevalent commodities by sites nationally are Citrus (1 554 sites registered for SIZA Social, 1 289 sites registered for SIZA Environmental), Table Grapes (869 sites registered for SIZA Social, 751 sites registered for SIZA Environmental), Stone fruit (789 sites registered for SIZA Social, 665 sites registered for SIZA Environmental), and Pome Fruit (725 sites registered for SIZA Social, 614 sites registered for SIZA Environmental). In the Western Cape, the most prevalent commodities per site are Stone fruit (715 sites registered for SIZA Social, 622 sites registered for SIZA Environmental), Citrus (645 sites registered for SIZA Social, 574 sites registered for SIZA Environmental), Pome Fruit (642 sites registered for SIZA Social, 557 sites registered for SIZA Environmental), and Table Grapes (623 sites registered for SIZA Social, 542 sites registered for SIZA Environmental).

Commodity	All South Africa: Social		Western Cape: Social		All South Africa: Environmental		Western Cape: Environmental	
	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites
Citrus Sites	1554	23,28%	645	15,75%	1289	23,66%	574	16,57%
Table Grapes Sites	869	13,02%	623	15,22%	751	13,78%	542	15,64%
Stone Fruit Sites	789	11,82%	715	17,46%	665	12,20%	622	17,95%
Pome Fruit Sites	725	10,86%	642	15,68%	614	11,27%	557	16,08%
Subtropical Fruit Sites	487	7,30%	65	1,59%	398	7,30%	52	1,50%
Wine Grapes Sites	482	7,22%	475	11,60%	382	7,01%	379	10,94%
Fresh Vegetables Sites	423	6,34%	254	6,20%	290	5,32%	199	5,74%
Berries Sites	223	3,34%	133	3,25%	185	3,40%	112	3,23%
Nuts & Seeds Sites	256	3,84%	40	0,98%	211	3,87%	27	0,78%
Dried Fruit & Dried Vegetables	109	1,63%	34	0,83%	91	1,67%	29	0,84%
Flowers & Ornamentals Sites	80	1,20%	73	1,78%	62	1,14%	58	1,67%
Grains Sites	59	0,88%	12	0,29%	46	0,84%	8	0,23%
Capsicum Sites	57	0,85%	8	0,20%	34	0,62%	0	0,00%
Sugar & Oils Sites	30	0,45%	9	0,22%	24	0,44%	8	0,23%
Livestock & Animals Sites	23	0,34%	17	0,42%	12	0,22%	10	0,29%
Seasoning & Preservatives Sites	19	0,28%	13	0,32%	10	0,18%	9	0,26%
Canning Fruit Sites	17	0,25%	17	0,42%	12	0,22%	12	0,35%
Spirits & Alcoholic Beverages Sites	5	0,07%	5	0,12%	5	0,09%	5	0,14%
Juice Sites	3	0,04%	1	0,02%	1	0,02%	0	0,00%
Other Products Sites	464	6,95%	313	7,65%	367	6,74%	262	7,56%
Total Sites	6674	100,00%	4094	100,00%	5449	100,00%	3465	100,00%

Commodity Statistics: General

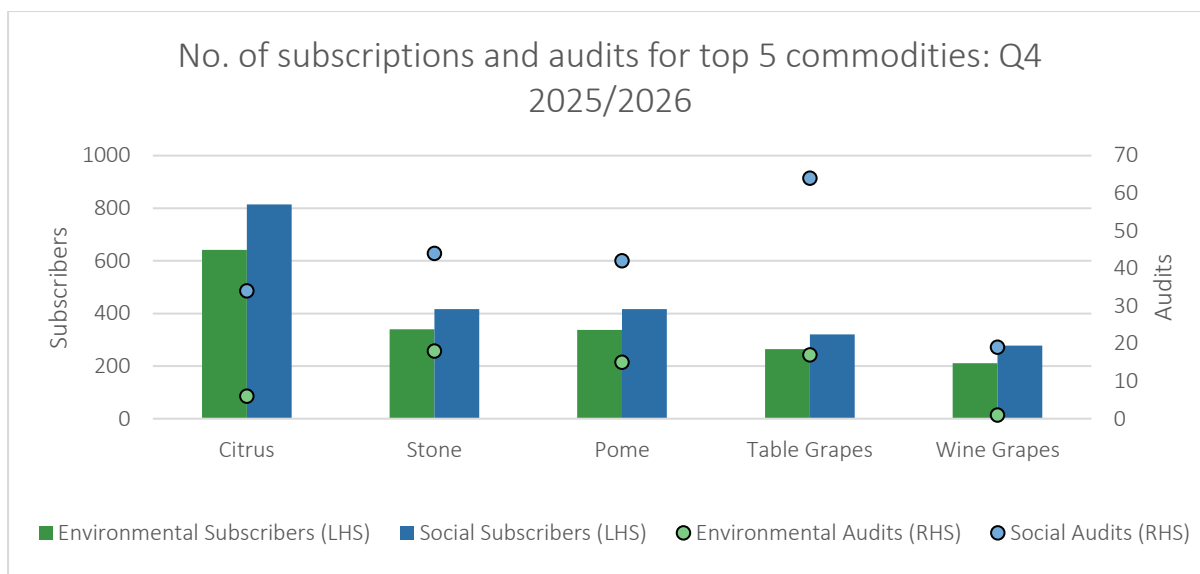
Looking at sites (not hectares) below is a representation of the five commodities with the largest representation among SIZA subscriptions: Citrus, Stone Fruit, Pome Fruit, Table Grapes, and Wine Grapes. Notably, wine grapes inclusion here is driven by many farms containing diverse commodities, often including wine grapes. Berries were also included due to their large subscription growth over the last few years. 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 site is represented in the SIZA subscription base. In terms of subscribed sites in Q4 of 2025/2026, Citrus accounts for 32% of all registered Social sites and 34% of all registered Environmental sites, followed by Stone Fruit (15% of Social sites; 15% of all Environmental sites), Pome Fruit (11% of Social sites; 11% of Environmental sites), Table Grapes (7% of Social sites; 8% of Environmental sites), Wine Grapes (8% of Social sites; 7% of Environmental sites), and Berries (3% of Social sites; 2% of Environmental sites).



Commodity Statistics: Primary Subscribers and Audits

The graph below illustrates the number of active primary Social and Environmental subscriptions and audits of the top 5 commodities for Q4 2025/2026. The number of subscribers is depicted by the vertical bars and read via the left vertical axis. The number of audits is represented by the scatter dots and read via the right vertical axis.

Citrus accounts for the greatest amount of Social (815) and Environmental (642) subscribers, followed by Stone Fruit (417 Social and 340 Environmental subscribers), Pome Fruit (417 Social and 338 Environmental subscribers), Table Grapes (321 Social and 265 Environmental subscribers), and Wine Grapes (278 Social and 211 Environmental subscribers). Table Grapes accounted for the most significant number of audits in Q4 of 2025/2026 (64 Social and 17 Environmental audits), followed by Stone Fruit (44 Social and 18 Environmental audits), Pome Fruit (42 Social and 15 Environmental audits), Citrus (34 Social and 6 Environmental audits), and Wine Grapes (19 Social and 1 Environmental audits). It should be noted that the number of audits for each commodity are season-specific, resulting in fluctuations in the number of audits between commodities in different quarters. For example, less Citrus audits were done in Q4 via-a-vis other commodities in comparison to Q2 or Q1 due to Citrus being out of season in Q4. Likewise, an increase in the number of Table Grape audits due to the Table Grape season occurring during Q4.

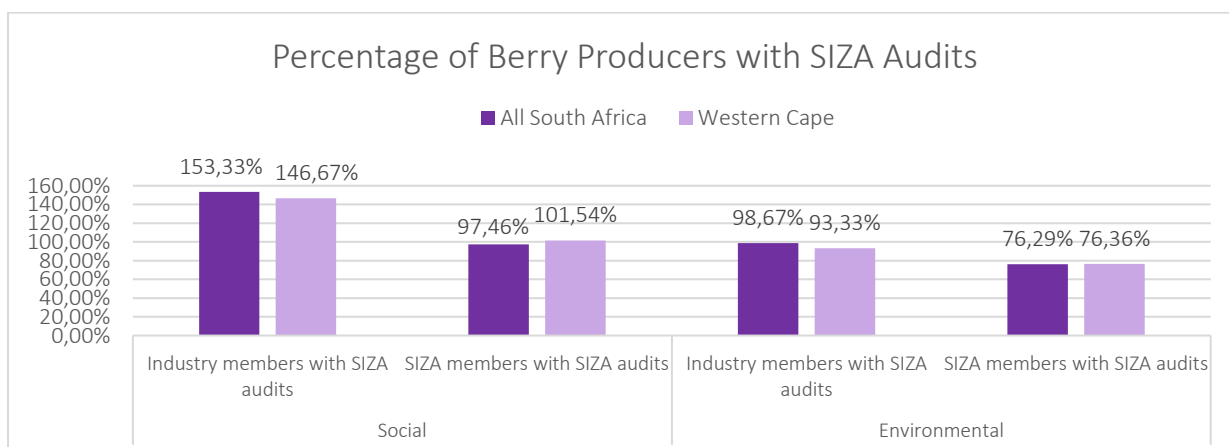
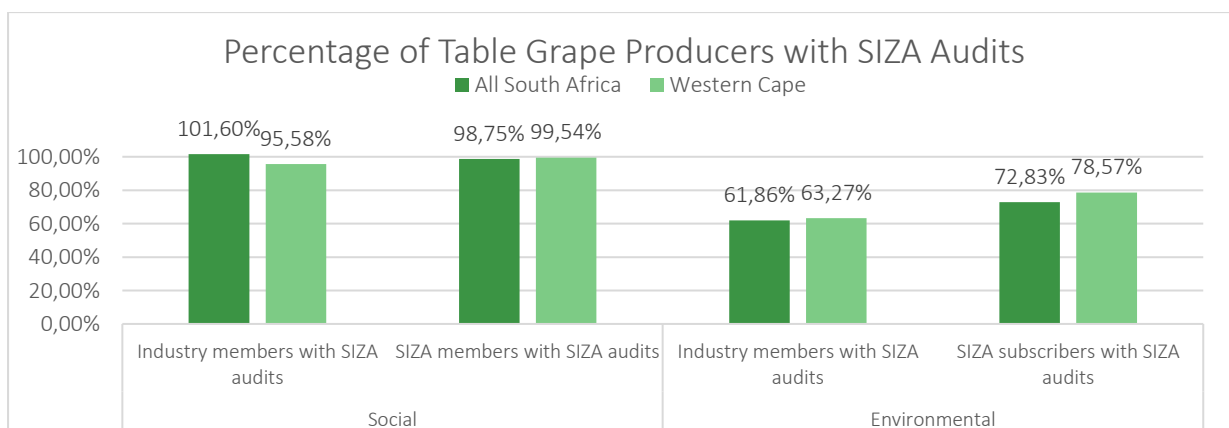
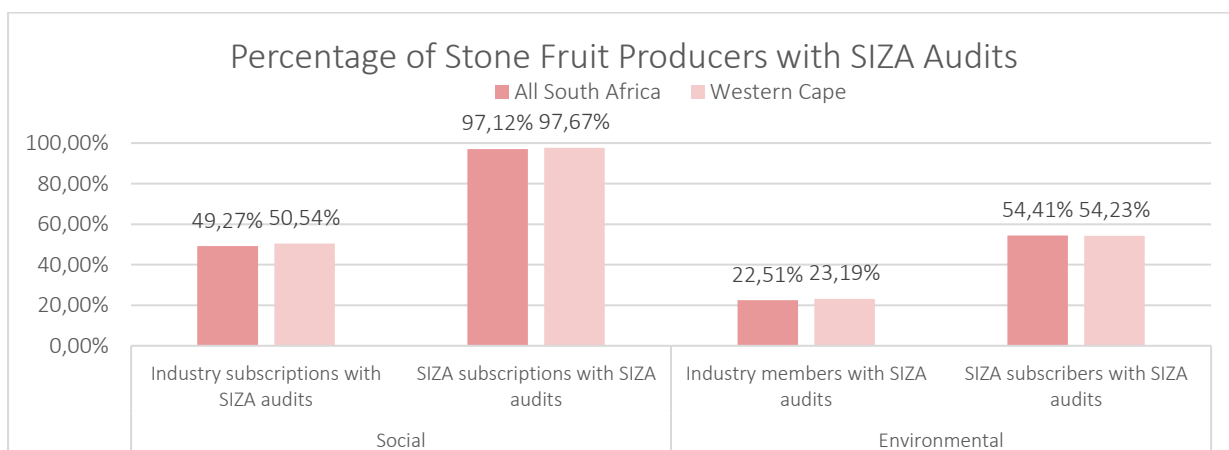
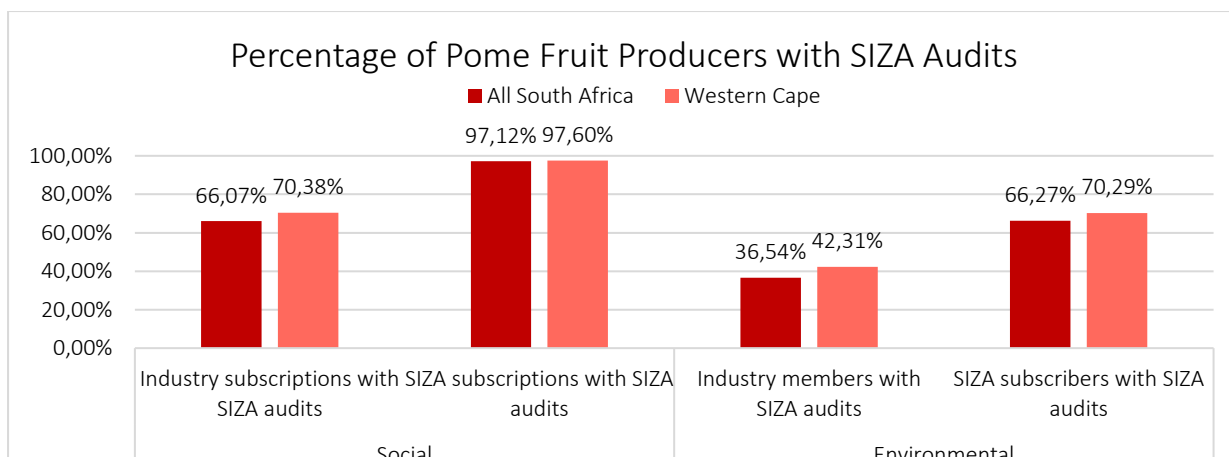


SIZA Environmental subscriptions are currently dominated by five fruit industries – the Citrus, Stone fruit, Pome fruit, Table Grape, and Wine Grape industries. The Citrus, Stone fruit, Pome fruit, and Table Grape industries were key to the initial founding of SIZA, which can be seen in their significant commitment to the SIZA Standards. Subtropical fruits also constitute a large share of SIZA subscriptions. Other agricultural industries also contribute significant subscription to SIZA, albeit at smaller numbers per industry currently. Due to the nature of the data collected, industry statistics for Citrus and Wine cannot be used to compare because the most recent seasonal data is not yet available.

Commodity Statistics: SIZA and Industry Comparison

Although many agri-industry suppliers are represented within the SIZA programme and have already conducted several SIZA Social (Ethical) audits, not all have conducted SIZA Environmental audits. As SIZA is a voluntary programme, the growth in the number of subscriptions and audits is primarily driven by market requests to conduct Environmental audits. Thus, the number of SIZA subscribers voluntarily conducting SIZA Environmental audits is already increasing steadily. This may be because environmental market requirements are not yet as widespread as social (ethical) requirements; however, recent market engagements indicate that various buyers are starting to implement internal supply-chain requirements on environmental assurance/compliance. With many export markets targeting 2025 and beyond for higher levels of environmental compliance, the number of SIZA Environmental Standard audits is expected to rise significantly over the next few years. South Africa and the European Union are also passing legislation regarding environmental compliance, such as the Carbon Tax Act, the Paris Agreement and the EU Due Diligence policy, which requires businesses to showcase compliance against environmental sustainability requirements.

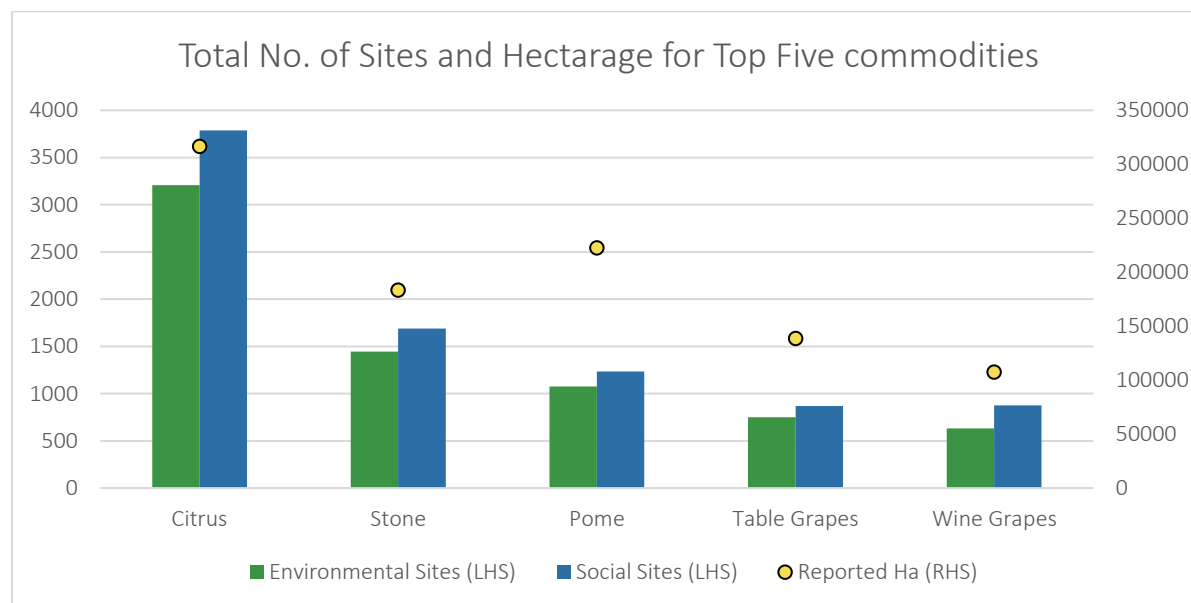
As mentioned above, **due to data restrictions, comparisons between SIZA and industry regarding Citrus and Wine Grapes cannot be conducted.** It is Interesting to note that more Table Grape and Berry suppliers are registered with SIZA than with their respective Industry Associations. This might be due 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 than the industry association. Based on the most recent data available per fruit industry, three of the most prevalent commodities in the Western Cape are Stone Fruit (386 subscribers), Pome Fruit (375 subscribers), and Table Grapes (217 subscribers). When comparing the information provided by SIZA Environmental 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 Social subscription base, as per the below graphs. Notably, there are more Table Grape and Berry suppliers with SIZA subscriptions than Table Grape and Berry suppliers who are members of their respective industry associations. Notably, the number of berry suppliers associated with the respective industry body has declined significantly since last quarter.



Commodity Statistics: Hectarage and Sites

The graph below illustrates the total hectares (not sites) for the above selected commodities 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. Notably, the number of hectares allocated to Table Grapes has increased significantly last quarter despite no significant increase in the commodity's subscription base, implying more accurate self-reporting of hectarage during annual SAQs. It is important to note that, as SIZA evaluates the centralised management system, the total hectarage 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 hectares counted towards each commodity type contained within that site.

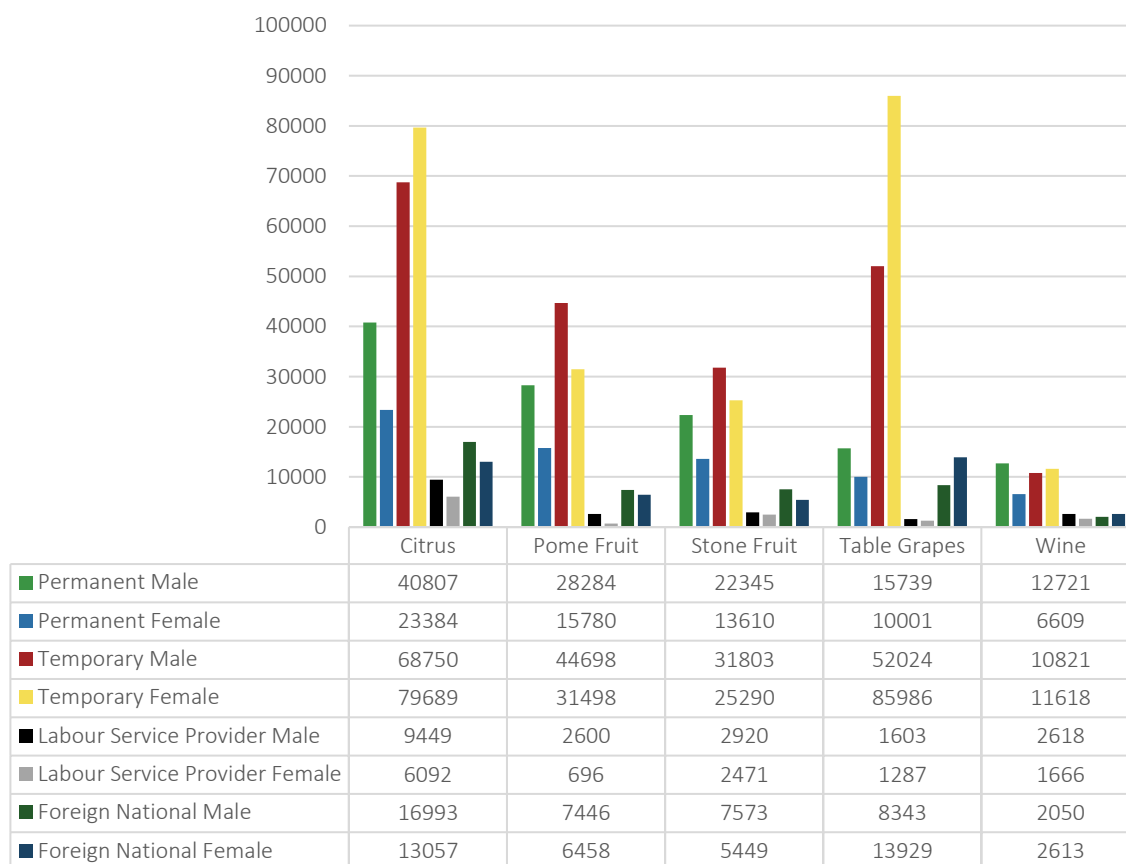
This could result in significant differences between the total hectares per commodity under SIZA and the respective industry bodies compared to the number of Sites registered within SIZA.



Commodity Statistics: Workers

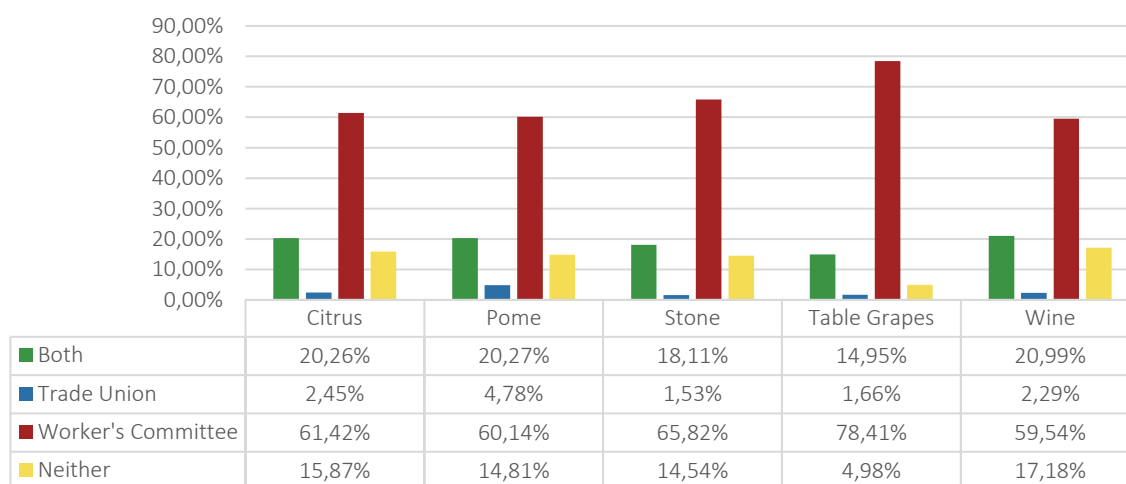
The graph below depicts the total number of workers per each worker category for the top five commodities represented under SIZA. Here, it is important to note that a worker may work on a farm that produce multiple commodities (i.e., Citrus and Wine Grapes), meaning that a single worker may be represented twice in the below graph.

Total Number of Workers per Worker Type for Top Five Commodities



The graph below depicts the intersection between labour unions' representation and worker committees for the top five commodities for 2025/2026. Here, it is notable that the top five commodity with the greatest degree of labour protection (having a union, worker committee, or both) were Table Grapes (95,02%), followed by Stone Fruit (85,46 %), Pome Fruit (85,19%), Citrus (84,13%), and Wine Grapes (82,82 %).

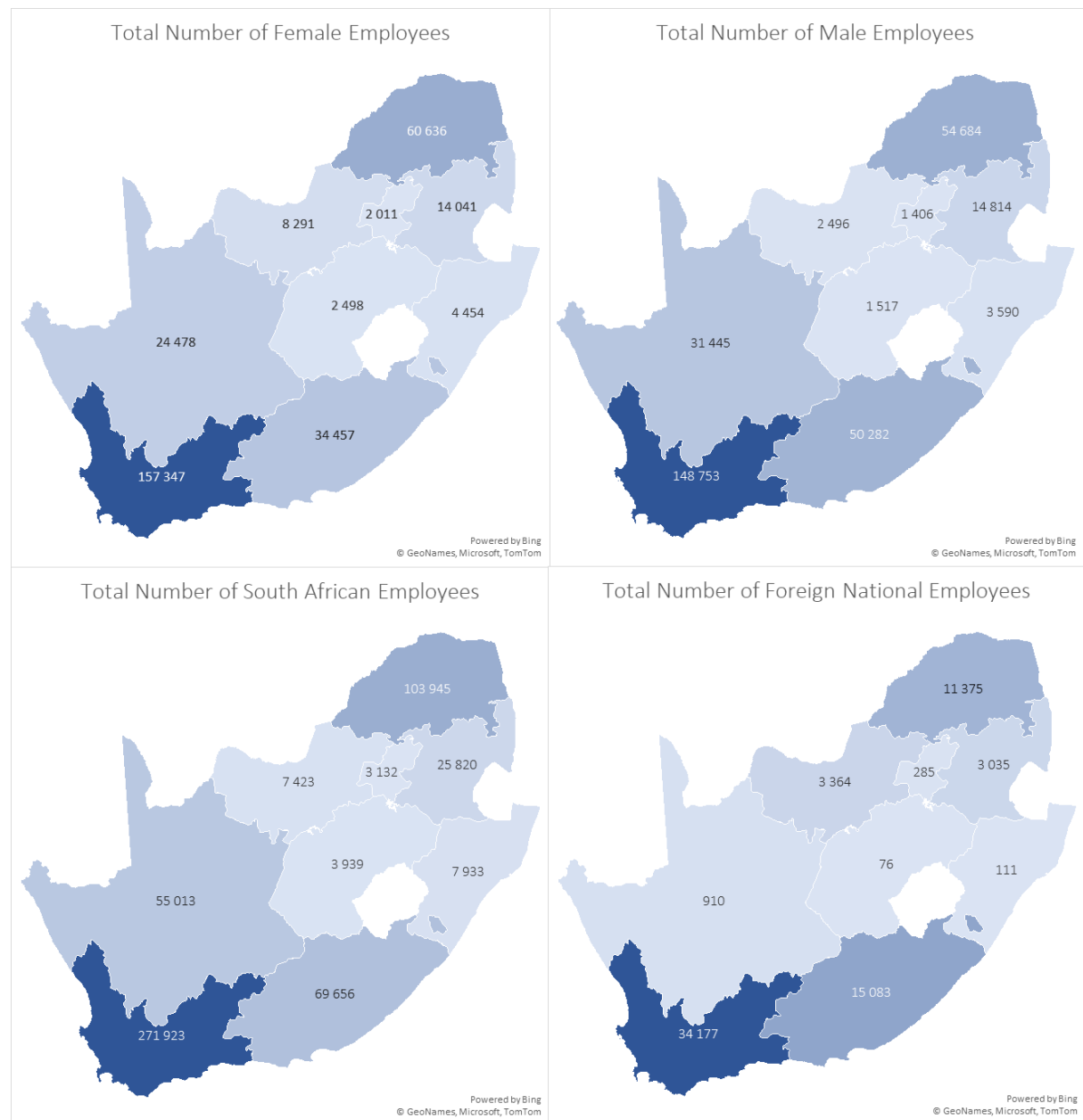
Trade Unions and Worker Committee Representation: Top Five Commodities



1.5 Workforce and Wages Overview

Worker Summary

The following provides information on agricultural workers employed on farms registered under the SIZA programme. Data is obtained from SAQs completed by the supplier over the last 12 months and approved by the SIZA compliance specialist. The Western Cape accounts for the highest number of employees (47,97%) due to the large number of fruit suppliers who are SIZA subscribers based in the Western Cape. Notably, there has been a decrease in the number of agricultural employees represented under SIZA due to the decline in agricultural employment for the industry as a whole, driven by increased operational costs, economic uncertainty, and climatic shocks such as biosecurity outbreaks, flooding, and wildfires.



The table on the page below 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	1 129	495	4 417	4 032	572	571	3 847	5 787	20 850
Eastern Cape	11 179	4 323	29 260	22 139	1 513	1 242	8 330	6 753	84 739
Free State	726	662	769	1 782	0	0	22	54	4 015
Gauteng	786	1 018	487	841	0	0	133	152	3 417
KwaZulu-Natal	1 817	1 600	1 483	2 489	208	336	82	29	8 044
Limpopo	20 586	14 487	23 425	40 768	2 803	1 876	7 870	3 505	115 320
Mpumalanga	6 017	3 870	5 612	8 358	1 404	559	1 781	1 254	28 855
Northern Cape	4 365	1 220	26 752	22 676	0	0	328	582	55 923
North West	976	733	772	4 762	5	175	743	2 621	10 787
Western Cape	47 879	31 024	78 356	101 358	7 725	5 581	14 793	19 384	306 100
Total Workers per Type	95 460	59 432	171 333	209 205	14 230	10 340	37 929	40 121	638 050

The following four tables indicate a breakdown of the percentages per province of Worker Committee and union representation. The information was collected using specific questions across all SAQs, focusing on the four main fruit commodities that account for the majority of the Primary SIZA subscription.

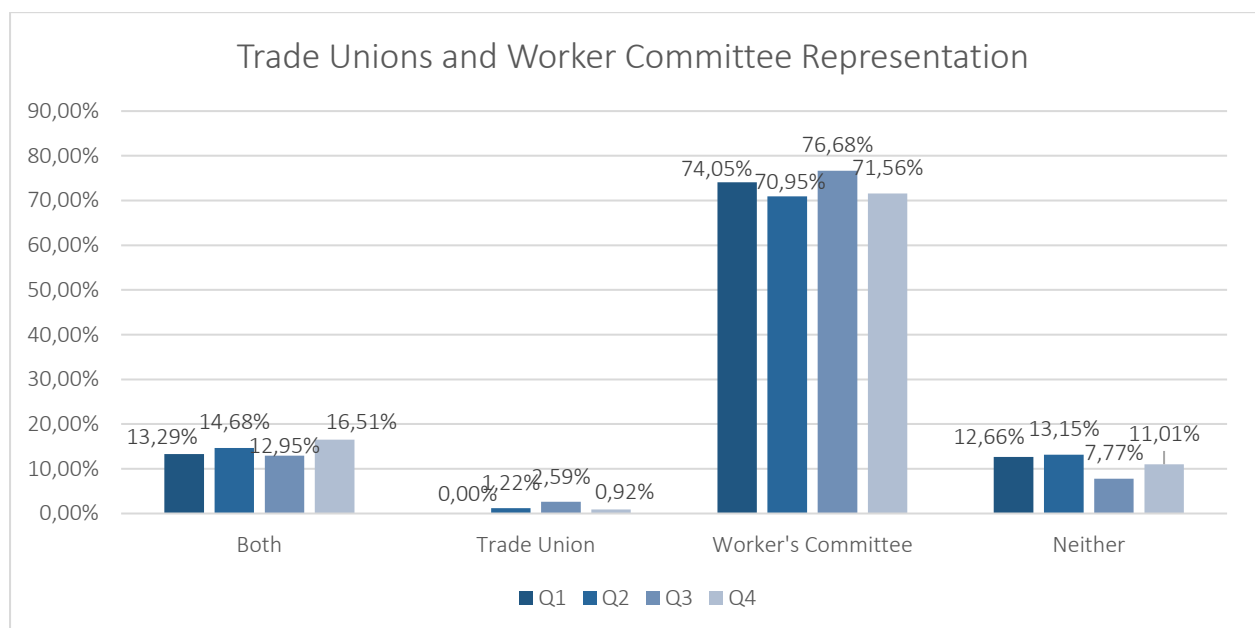
Percentage of suppliers with a Worker Committee and a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,72%	0,00%	0,00%	0,00%	0,24%	0,00%	0,00%	0,00%	17,07%
Pome Fruit	1,44%	0,48%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	19,47%
Citrus	3,38%	0,00%	0,00%	0,00%	5,89%	2,26%	0,63%	0,00%	7,39%
Table grapes	0,00%	0,00%	0,00%	0,00%	2,15%	0,00%	2,45%	0,31%	13,80%
Wine Grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	20,30%

Percentage of suppliers with a Worker Committee and without a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,48%	0,24%	0,72%	0,00%	0,72%	0,00%	0,00%	0,48%	62,02%
Pome Fruit	3,37%	2,16%	0,24%	0,00%	0,00%	0,00%	0,00%	0,00%	57,69%
Citrus	18,30%	0,00%	0,13%	0,63%	7,64%	2,38%	2,51%	0,50%	27,57%
Table grapes	0,00%	0,00%	0,00%	0,00%	3,37%	0,00%	18,71%	0,31%	49,39%
Wine Grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,74%	0,00%	57,56%

Percentage of suppliers without a Worker Committee and with a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,24%	0,00%	0,24%	0,00%	0,00%	0,00%	0,00%	0,00%	1,44%
Pome Fruit	0,24%	0,00%	0,24%	0,00%	0,00%	0,00%	0,00%	0,00%	4,57%
Citrus	1,00%	0,00%	0,13%	0,00%	0,13%	0,13%	0,00%	0,00%	1,00%
Table grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	1,53%
Wine Grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	2,21%

Percentage of suppliers without a Worker Committee and without a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,00%	0,00%	0,24%	0,00%	0,00%	0,00%	0,00%	0,00%	13,46%
Pome Fruit	0,48%	0,48%	0,24%	0,00%	0,00%	0,00%	0,00%	0,00%	14,42%
Citrus	3,76%	0,00%	0,13%	0,00%	0,75%	0,75%	0,13%	0,13%	9,77%
Table grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,31%	0,00%	4,60%
Wine Grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	16,61%

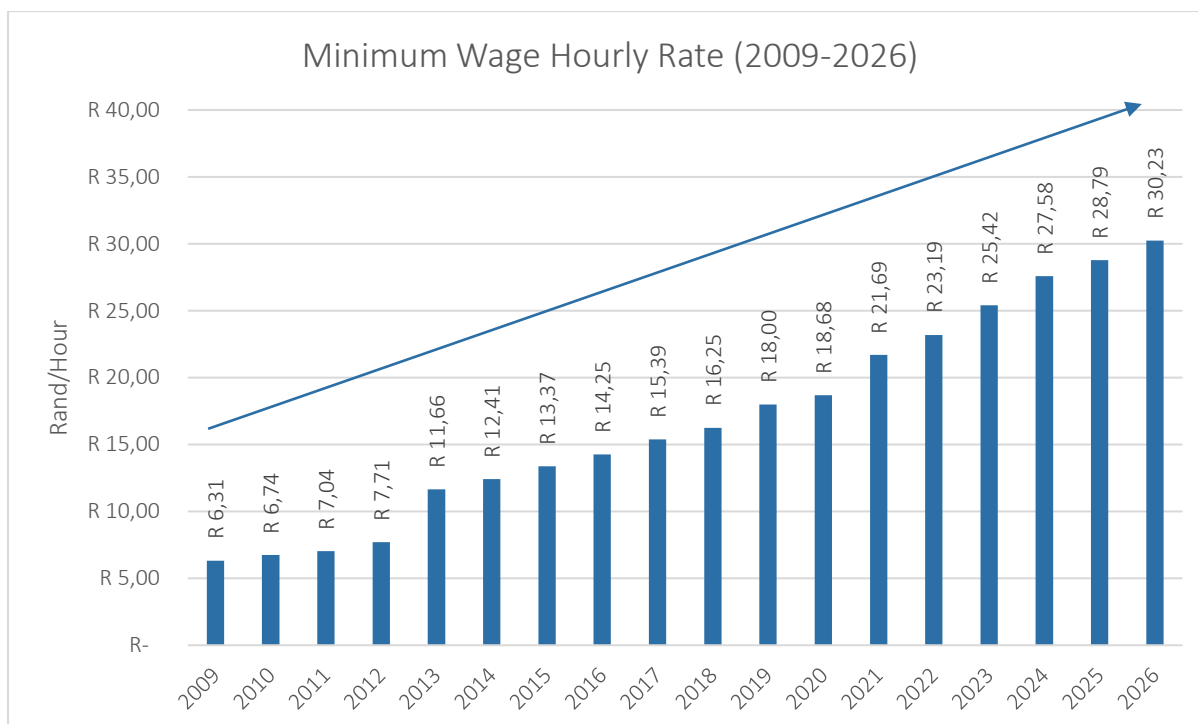
The graph below illustrates the intersection between labour unions' representation and worker committees. This graph compares the proportions of worker protection associations over the past four quarters. This graph suggests that the prevalence of unions and workers' committees is independent of one another. A total of 88,99% of subscribers in Q4 of 2025/2026 recognised a form of labour protection (71,56% recognising just worker committees, 0,92% recognising just trade unions, and 16,51% recognising both worker committees and unions). The remaining 11,01% of subscribers have neither.



Increase in Wages Over Time

Over the past 17 years, South Africa's agricultural sector has undergone a significant transformation, marked by substantial wage increases aimed at improving farmworkers' well-being and living conditions. While these advancements have brought meaningful benefits to employees, they have also posed growing challenges for suppliers, who face rising operational costs each season and year.

Although a minimum wage principle was introduced in 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 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, reflecting the industry's growth and efforts to ensure fair wages. These year-on-year wage increases have improved the living standards of those involved in the sector and contributed to greater economic stability and social development in South Africa, but not without challenges at the industry level.

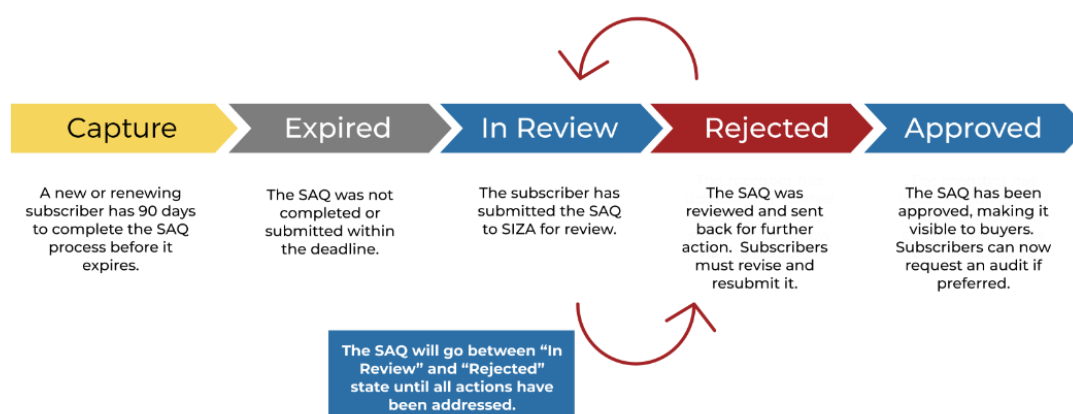


2. SELF-ASSESSMENT QUESTIONNAIRE ANALYSIS

The purpose of the SAQ is to give primary subscribers an opportunity for self-evaluation and to benchmark against South African legislation. SAQs are also crucial for auditing, as the auditors use the SAQ information as a benchmark during third-party audits. SIZA uses the SAQ as an online monitoring system to maintain audit results between the three- or two-year audit validating period. Between audit monitoring, which forms part of market requirements and EU due diligence, to ensure that human rights are upheld at all times.

The SAQ Process

The image below depicts the SAQ process. More information about the details of the process is available on the SIZA website: <https://siza.co.za/completing-the-saq/>

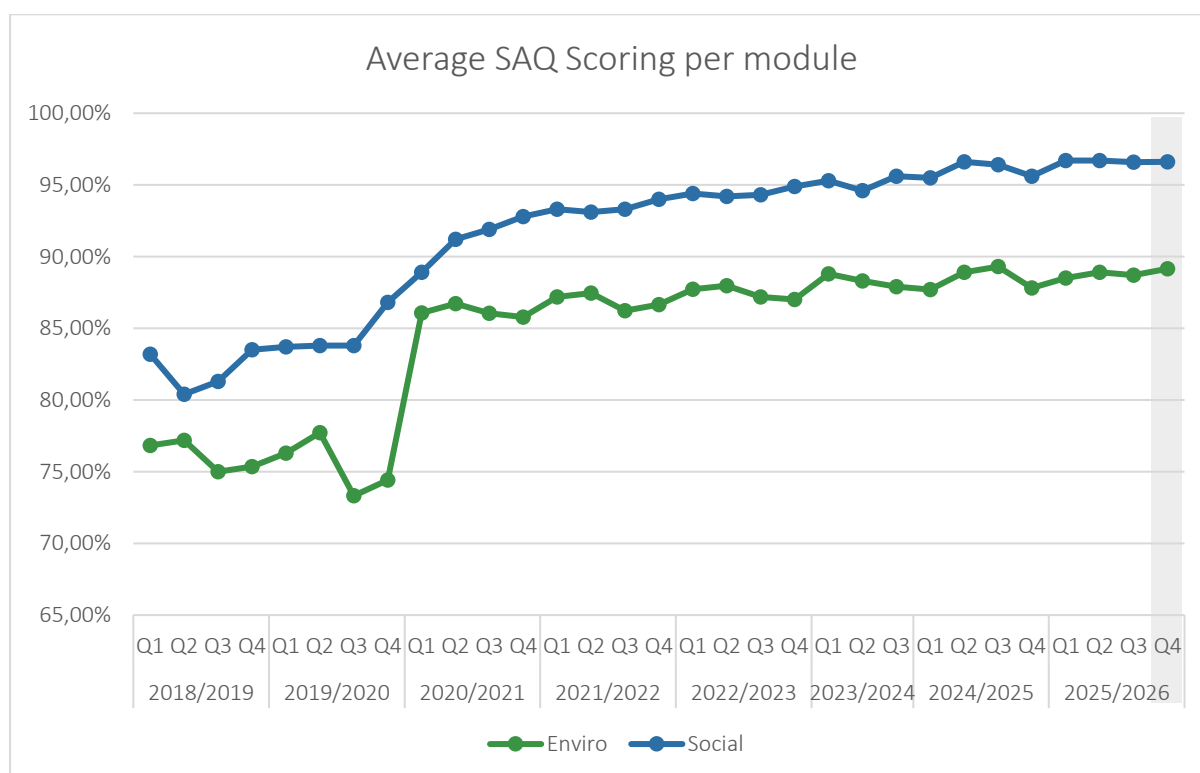


SAQ Scoring

SIZA SAQ percentages are risk-based, not completion-based, meaning the percentage score assigned to each SAQ is based on the risk level associated with the subscriber's answers, not on how many questions were completed. The SAQs indicate growth and improvement year on year, as the primary subscribers are required to complete their SAQs annually as part of the SIZA between audit monitoring programme. The MySIZA platform enables subscribers to provide feedback using a risk indicator that scores each answer based on its risk. SIZA SAQ percentages are risk-based, not completion-based, meaning that the percentage score assigned to each SAQ is based on the risk level associated with the subscriber's answers, rather than an indication of how many questions were completed.

The average score for all Social (Ethical) SAQs approved in Q4 is 96,61%. The highest score for an approved Social SAQ in this period is 100%. The average score for all Environmental SAQs approved in Q4 2025/2026 is 89,16%. The highest score for an approved Environmental SAQ in this period is 98,25%. The SIZA compliance staff try to 1) only approve SAQs for existing subscribers with a SAQ risk score above 85% (5% higher than 2020) and 2) to ensure that suppliers are audit-ready. SIZA compliance experts help SIZA subscribers improve their scores year-over-year as part of a continuous improvement process.

In total, the average SAQ scores for the 2025/2026 financial year were 88,82% for Environmental SAQs compared to 88,43% in the 2024/2025 year (a 0,44% increase). For Social SAQs, the average scores for the 2025/2026 financial year were 96,65% compared to 96,03% for the 2024/2025 year (a 0,65% increase).



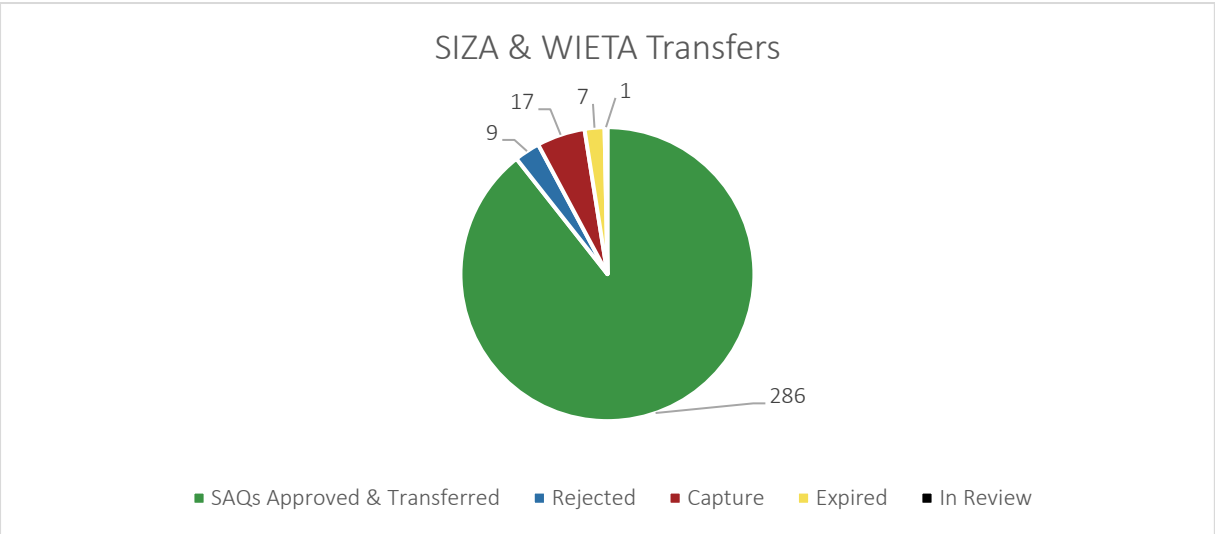
WIETA Collaboration & Combined Audit Process

SIZA and WIETA have collaborated to create a combined audit process for agricultural businesses to avoid duplication. This allows fulfilment of requirements for both standards through a single social audit on the same day. The partnership, which began in 2016, enables subscriptions to both programmes to combine these two audits on one day while still receiving separate audit reports and Audit Completion Letters, as the programmes operate independently and serve different global buyer requirements and markets.

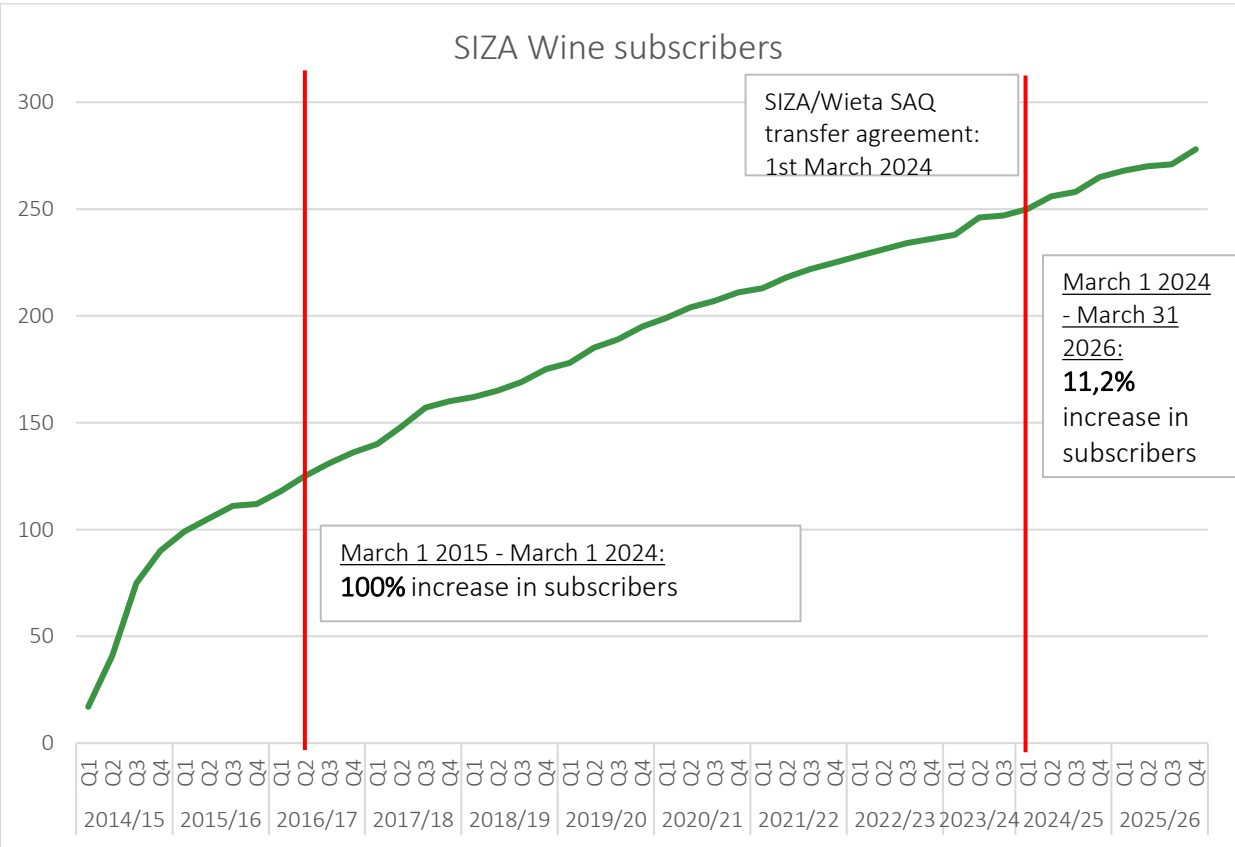
Starting from June 1, 2024, SIZA proposed a procedure to further streamline and avoid duplication for the completion of Self-Assessment Questionnaires (SAQs) for suppliers. Under this arrangement, suppliers only need to complete the Social SAQ on the MySIZA platform, after which SIZA transfer the necessary SAQ data to the

WIETA platform on their behalf. This change aims to save time and reduce duplication, allowing suppliers to address WIETA-specific questions directly, which were built in as an add-on on the SIZA SAQ.

During this reporting quarter, 320 SIZA subscribers have utilised this function. 286 of these SAQs have already been reviewed and approved, resulting in successful transfers to the WIETA platform.



The below graph depicts the total number of SIZA wine subscribers over time, with the initial 2016 and recent 2024 SIZA/WIETA agreements indicated. Between the 2016 partnership agreements and the 2024 SAQ transfer agreements, the number of wine suppliers subscribed to SIZA increased by 100%. This increased by a further 11,2% since the 2024 SAQ transfer agreement to the current total of 278 wine suppliers. Over the past year, the total number of wine suppliers subscribed to SIZA has increased by 10, representing a 3,7% increase over the past 12 months.



LEAF-Marque Collaboration

The SIZA and LEAF-Marque programmes announced an equivalency agreement between their standards in January of 2024 to alleviate auditing burdens on suppliers and eliminate duplication. This agreement streamlines the auditing process, allowing suppliers to undergo a single SIZA environmental audit with a LEAF Bolt-On module, conducted by mutually recognised and approved audit firms and auditors. In the most recent reporting period, a total of 105 SIZA Environmental SAQs were initiated with the LEAF Bolt-On selected. SIZA also pursued an agreement with Leaf Marque for suppliers to complete the SAQ only on the MySIZA Platform instead of on both platforms.

3. AUDIT EXECUTION AND FINDINGS

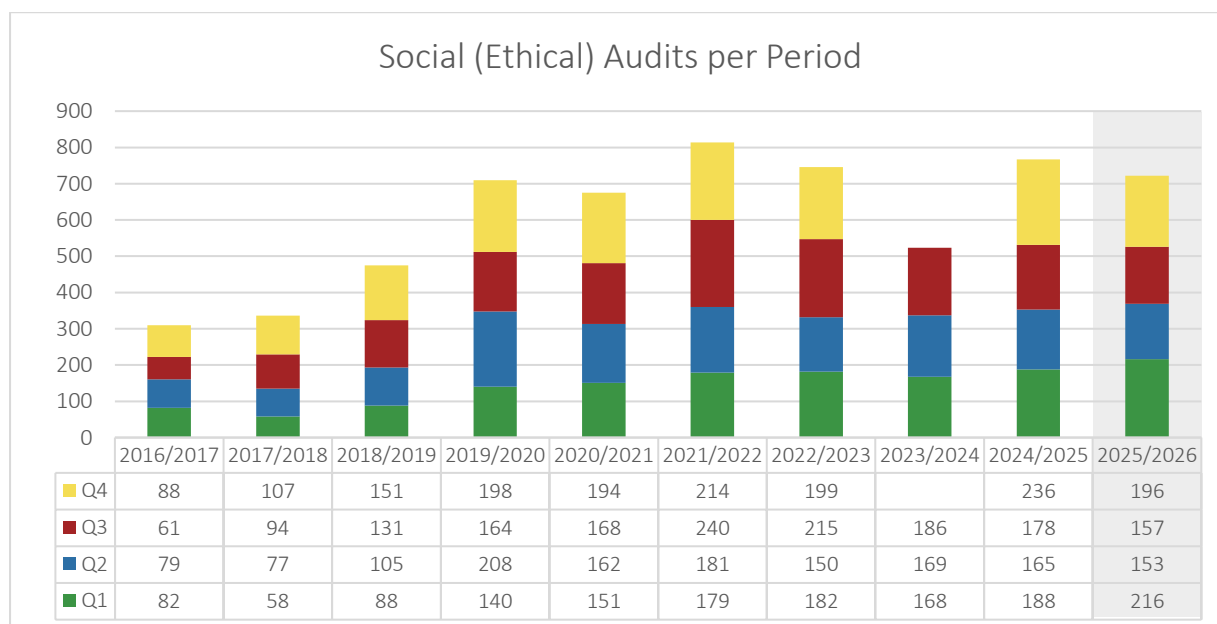
3.1 Audit Activity Overview

Social and Environmental Audits per Period

SIZA adopted a third-party audit approach to ensure a credible, objective process that reflects the audit outcome in a business's environmental and ethical labour practices. A SIZA audit is not a pass-or-fail exercise but aims to assist all people living and working in agriculture to drive ongoing improvement in socially responsible business practices and environmental assurance. The third-party audit aims to evaluate the implementation of legislation as indicated in the SIZA Standards by evaluating and identifying areas within the business that are non-compliant, a risk, and require corrective and remedial actions, so that ongoing continuous improvement can occur.

As with subscriptions, we saw steady growth over the last 9 years in the number of Social (Ethical) audits per year. Since 2016, 6 078 Social (Ethical) audits have been conducted. It is important to take note of the SIZA Audit Frequency Matrix, which results in some suppliers achieving longer or shorter audit validity periods, meaning 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 quarterly audits, depending on the number of subscribers for a particular commodity group that only audits during peak season. It is also noteworthy to see the impact during the COVID-19 pandemic between 2020 and 2022, which also played a role.

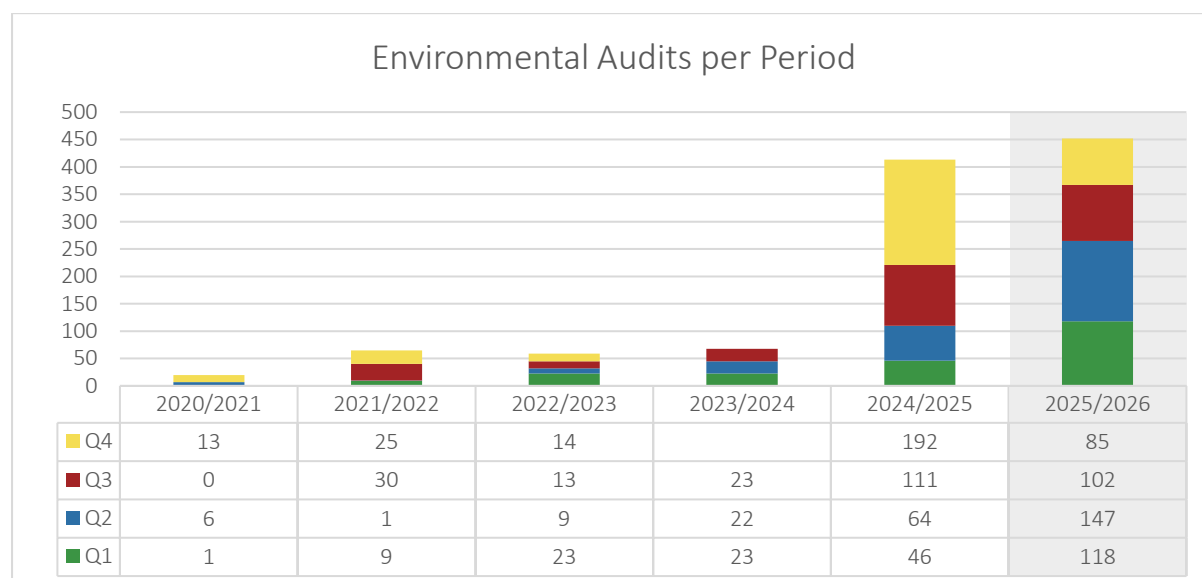
Over the last annual period (12 months), 722 Social audits were conducted, while in the past three months (Q4), between 1 January and 31 March 2026, 196 Social audits were conducted. This steady growth can be related to SIZA becoming a multisector agri-wide programme. The graph below shows the number of audits per quarter for each year since 2016 and demonstrates the steady, gradual increase in Social (Ethical) audits over time. Over the past year, a total of 722 SIZA Social audits were conducted. The total number of Social audits in the 2025/2026 financial year (722) compared to the 2024/2025 year (767) represents a 5,87% annual decrease.



During the Q4 2025/2026 reporting period, 85 Environmental audits were conducted. This can be attributed to specific markets, indicating that their suppliers must comply with an environmental sustainability standard such as LEAF Marque. SIZA completed the benchmark against the LEAF Marque standard and formed a partnership and agreement with them to work together to avoid duplication and save costs.

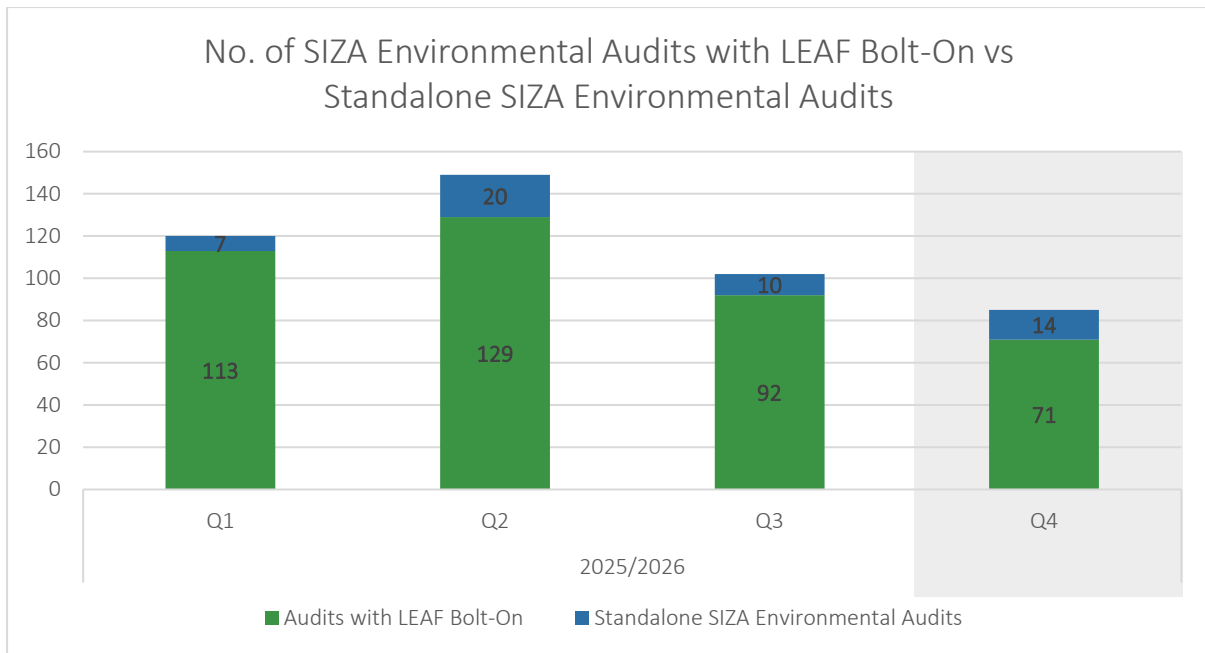
Over the past 12 months, a total of 452 SIZA Environmental audits were conducted. Compared to the 2024/2025 financial year (413 Environmental audits), this represents a 9,4% annual increase.

Taking SIZA's audit frequency into consideration, Environmental audits have consistently increased over the last three years. The last three years have shown an average of 311 audits per year, compared to the three years prior, which only consisted of 48 audits on average per year.



The SIZA programme has agreements with GLOBALG.A.P. and LEAF Marque to allow for different cost-saving combined audit options. The SIZA and GLOBALG.A.P. combined audit option allows for a supplier to undergo a combined audit wherein an auditor does both a GLOBALG.A.P. and SIZA audit during the same site visit, for a reduced overall combined cost, resulting in separate auditing reports and certificates. SIZA also has a Bolt-On option in agreement with the LEAF Marque standard, in which a SIZA audit can be done with a LEAF Marque Bolt-On, resulting in one audit report and Audit Completion Letter (certificate). The LEAF Marque Bolt-On option recognises the SIZA multi-year audit validity period, whereas the GLOBALG.A.P. combined audit option does not.

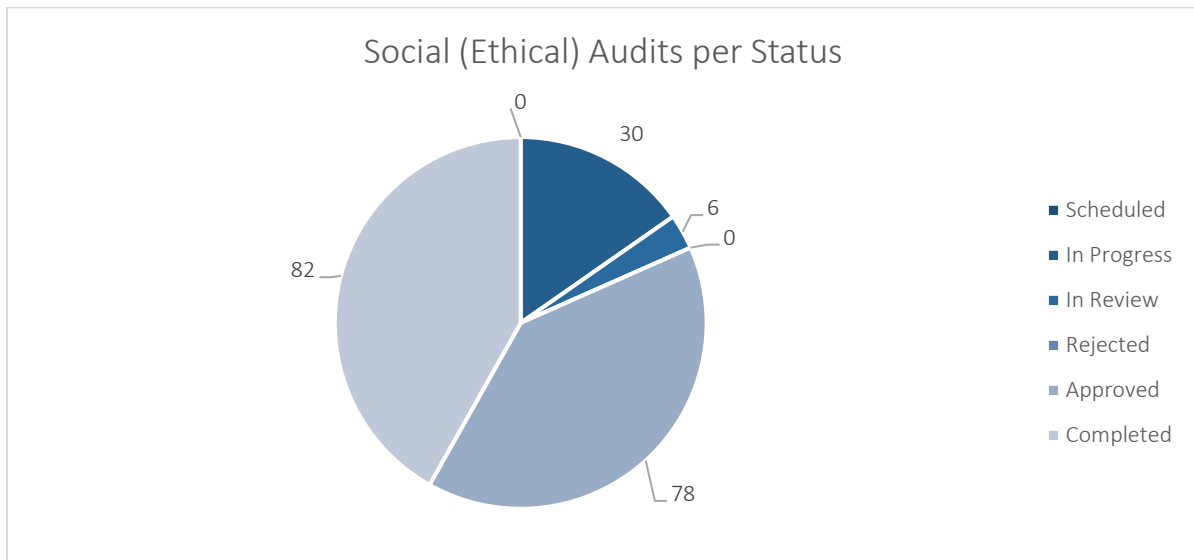
In the most recent reporting period, approximately 45% of all SIZA Environmental audits were conducted as both a combined audit with GLOBALG.A.P., and with the LEAF Bolt-On. Roughly 32% of SIZA Environmental audits were conducted solely with the LEAF Bolt-On, while approximately 4% conducted as standalone SIZA audits, and another 17% conducted as combined SIZA and GLOBALG.A.P. audits without the LEAF Bolt-on. The number of audits with the LEAF Bolt-on compared to the number of audits without the LEAF Bolt-on per quarter is illustrated in the graph below. In the most recent reporting period, a total of 71 Environmental audits were conducted with the LEAF Bolt-On, while the remaining 14 did not include the LEAF Bolt-On.



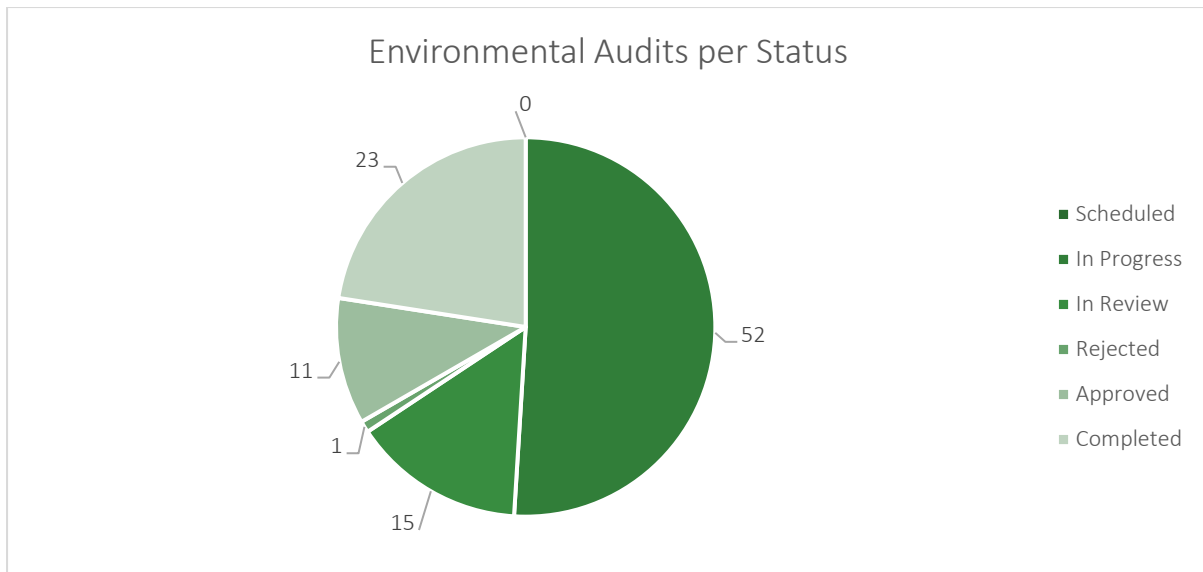
Audits Status

The SIZA programme emphasises 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 196 social audits conducted during Q4, 82 have already been completed in full, and 78 are in Approved status and awaiting corrective actions that must be uploaded by the supplier. The remaining 36 audits are in progress (30), or still being reviewed (6) by the audit firms. It is important to note that timelines are allocated to all the steps in the audit process for both the auditor and the auditee.

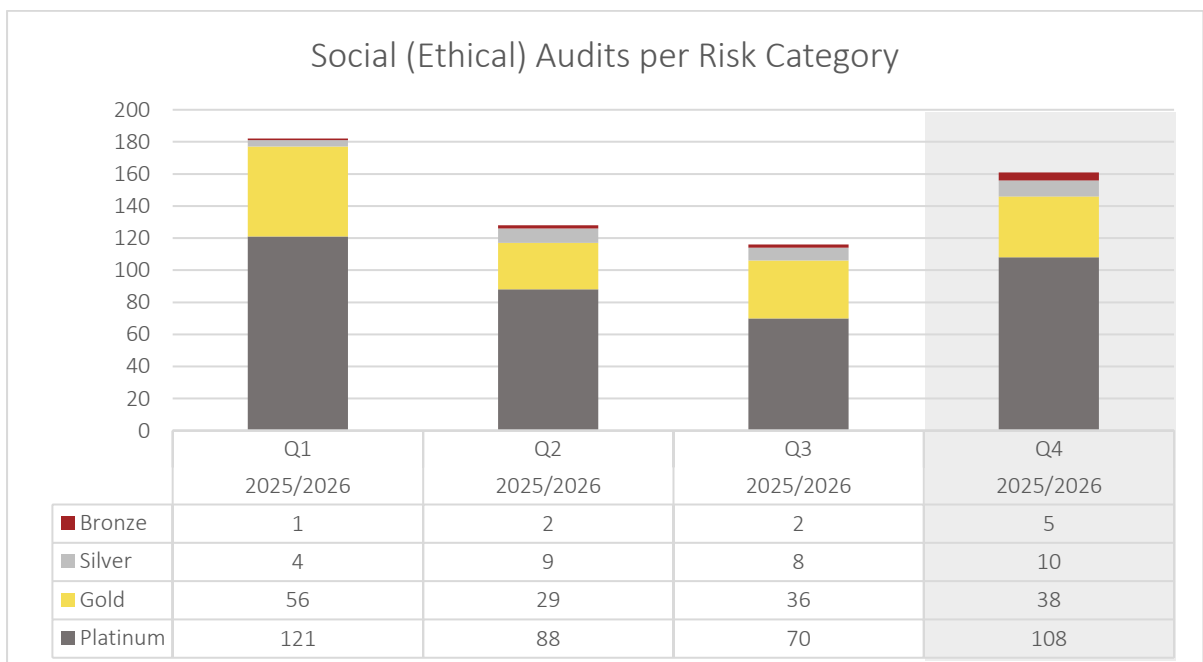


Of the 85 environmental audits conducted during Q4 of 2025/2026, 29 have already been completed, and 14 are approved and are awaiting corrective actions, which the supplier must upload. The remaining 42 audits are either still in progress (35), rejected (2) or being reviewed by the audit firms (5). It is important to note that timelines are allocated to all the steps in the audit process for both the auditor and the auditee.

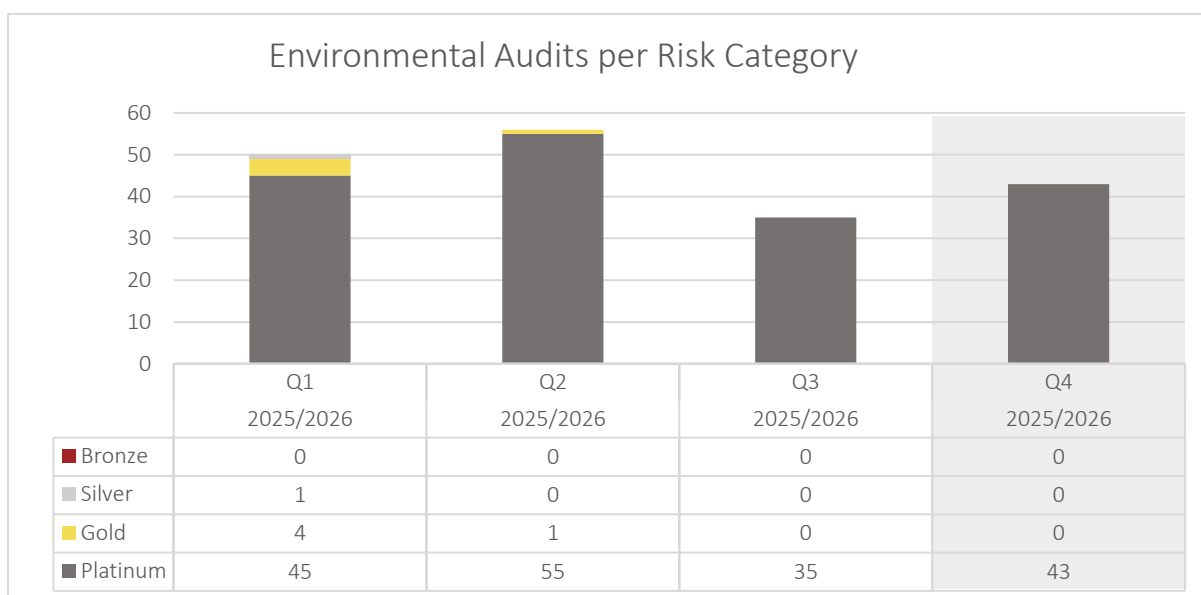


Audits per Audit Frequency Risk Category

The SIZA Social (Ethical) and Environmental 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.



Of the social audits completed during this reporting period, 108 achieved Platinum status, and 38 achieved Gold status. This implies that suppliers are showcasing their commitment to continuous improvement, which is evaluated and proven by the third-party audit outcomes. Of the social audits completed during this period, 154 audits were done in the Western Cape with 128 of these being completed, of which 92 achieved Platinum status, and 28 achieved Gold status.



During this reporting period, 43 out of the 85 environmental audits were completed, with all 43 achieving Platinum status. As Platinum is the highest possible rating a primary SIZA subscriber can attain, this demonstrates the agricultural industry's strong commitment to environmental sustainability and responsible environmental stewardship. The SIZA CARES between-audit monitoring visits have played a key role in helping subscribers prepare for their first third-party audits, resulting in fewer non-compliances and lower risk ratings—benefits that reduce the frequency of required audits. These positive outcomes also suggest that sustainable environmental practices are not new to most suppliers, many of whom have been farming responsibly for years. Of the 85 audits, 64 took place in the Western Cape (38 of which are completed), where all 38 achieved Platinum.

3.2 Non-Conformance (NC) Trends for the Period of 1 January – 31 March 2026

The non-conformances raised during audits indicate the industry's risk areas. Although the total number of non-conformances may increase slightly between periods, this can be attributed to the growing number of audits and increased training among auditors, which enables them to identify more areas of non-conformance. SIZA also expanded the audit checklist and included some new requirements over the last couple of years as part of the three-year update and renewal period that the SIZA standards go through. 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 with the following eight principles of the Social Standard:

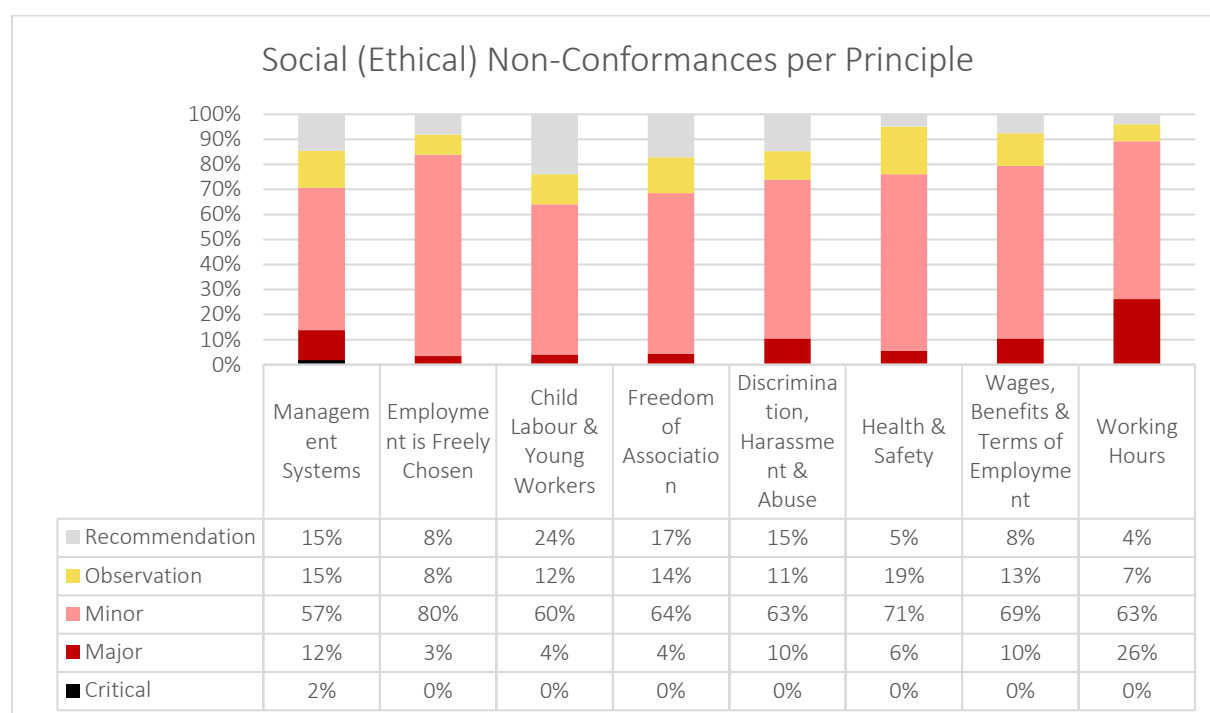
- Management systems
- Forced Labour (Employment is Freely Chosen)
- Child Labour
- Freedom of Association
- Discrimination, Harassment, and Abuse
- Health & Safety
- Wages, Benefits, and Terms of Employment
- Working Hours

The SIZA programme monitors compliance with the following five principles of the SIZA Environmental Standard:

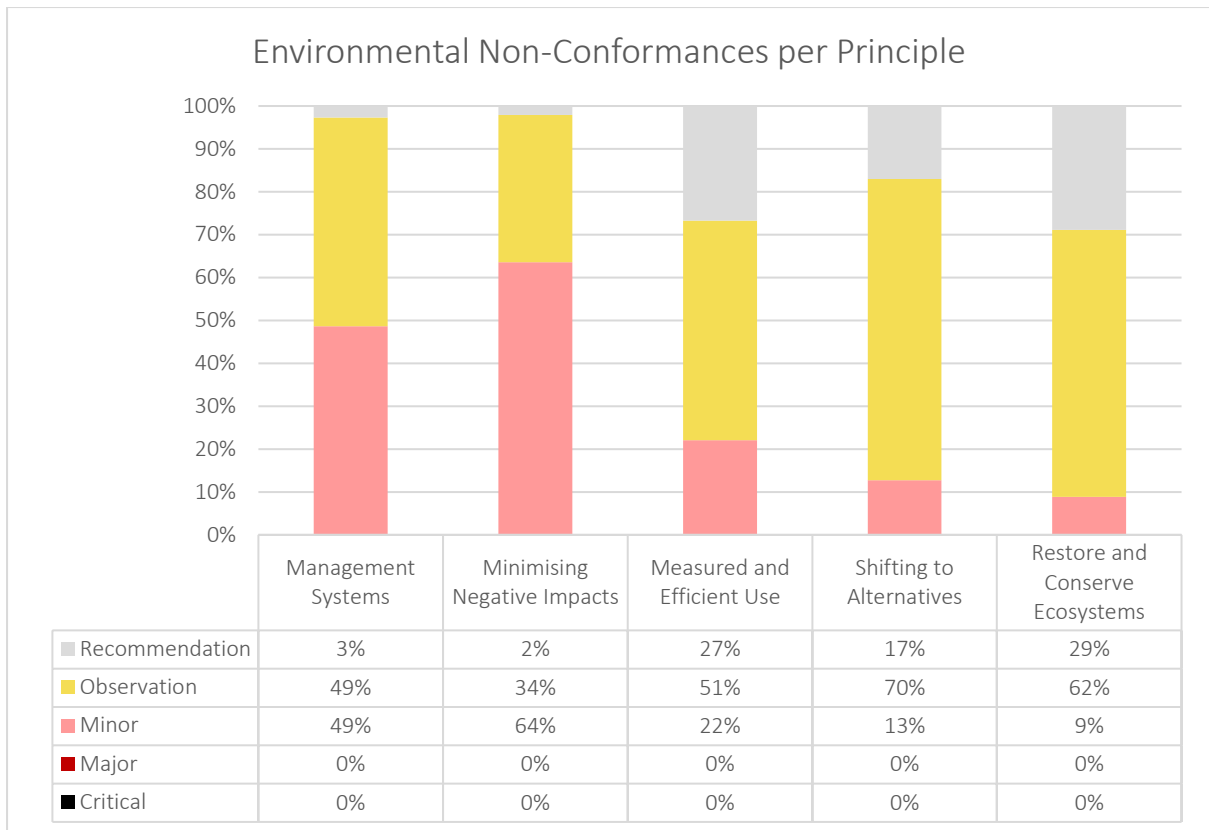
- Management Systems
- Minimising Negative Impacts
- Measured and Efficient Use
- Shifting to Alternatives
- Restore and Conserve Ecosystems

Non-Conformances Raised

In Q4 of 2025/2026, most non-conformances raised under the SIZA Social standard are minor non-conformances, which are the majority of findings for most principle codes under the SIZA Social module. Minor non-conformances are the majority of non-conformances raised under each code requirement. The graph below depicts the proportion of findings per risk category for each principle's code under the SIZA Social standard in the most recent reporting period.



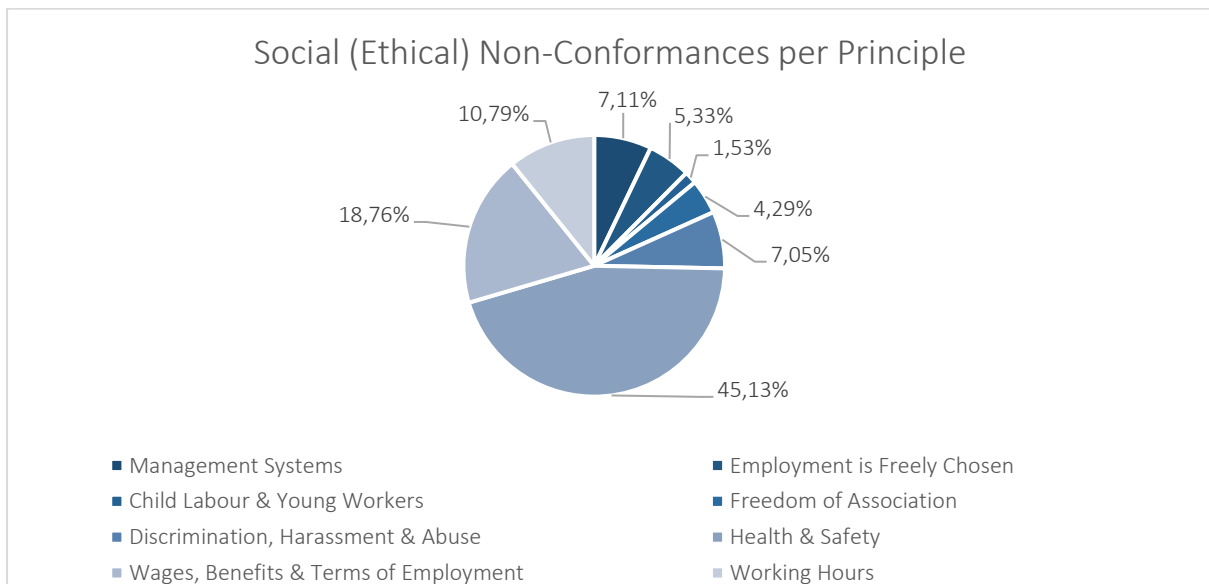
In Q4 of 2025/2026, most non-conformances raised under the SIZA Environmental standard are either minor non-conformances or observations. Minor non-conformances make up the majority of findings under the title code Minimising Negative Impacts (64%). Minor non-conformances and Observations both constitute similar portions of findings under the Management Systems title code (49% each). Observations represent the largest portion of non-conformances for the remaining title codes, namely Measured and Efficient Use (51%), Shifting to Alternatives (70%), and Restore and Conserve Ecosystems (62%). The below graph depicts the proportion of findings per risk category for each principle's code under the SIZA Environmental standard in the most recent reporting period.



Social and Environmental Non-Conformances per Category

Regarding Social audits during Q4 2025/2026, most non-conformances (74,68%) fell in the following three categories, namely:

- Health & Safety (736 findings);
- Wages, Benefits, and Terms of Employment (306 findings); and
- Working Hours (176 findings)



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.
- No health and safety risk assessment available that covers all health and safety risks within the business.
- Lack of adequate worker accommodation provided on-site.

Wages, Benefits & Terms of Employment:

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

- Lack of written contracts of employment provided to employees, including seasonal and temporary workers.
- Payslips provided do not contain all the legislatively required information.
- Workers unable to qualify for sick leave.

Working Hours:

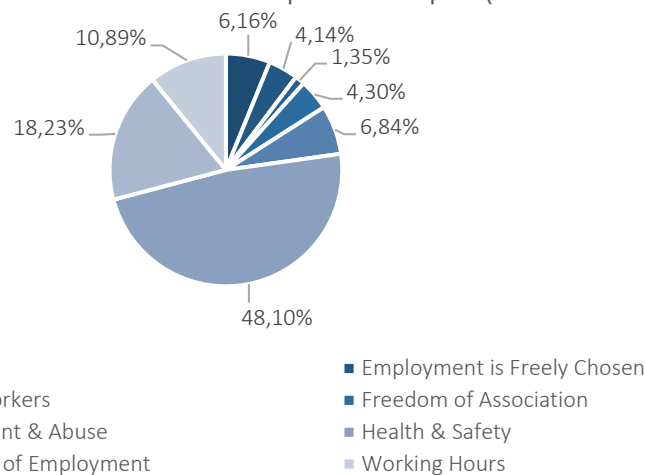
The third largest area of non-conformances lies with working hours. SIZA implemented training specifically on Working Hours in 2023, resulting in a 37% decrease in the number of findings related to this theme when compared to the three preceding the training's implementation. In general, the largest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

- No effective systems in place to record hours of work.
- Overtime does not conform to all the minimum legislative requirements.
- Rest periods and meal breaks are ineffectively managed and/or not in line with legislative requirements.

For the Western Cape, most non-conformances (77,22%) fell in the following three principles, namely:

- Health & Safety (570 findings);
- Wages, Benefits, and Terms of Employment (216 findings); and
- Working Hours (129 findings)

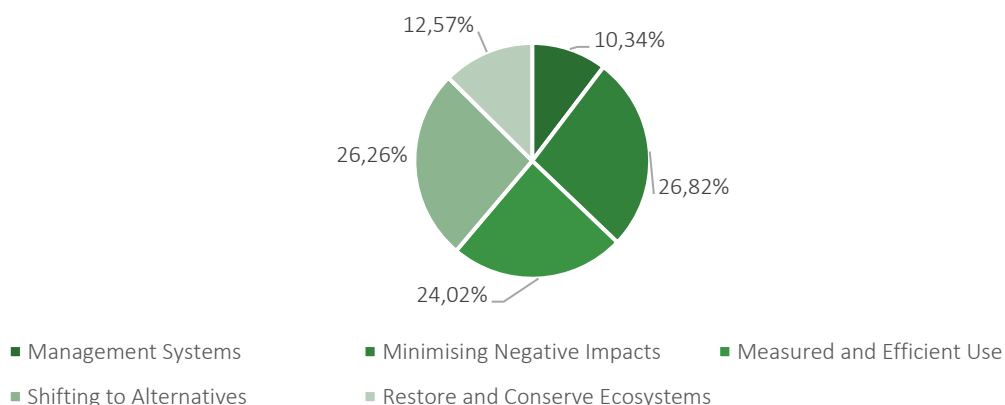
Social (Ethical) Non-Conformances per Principle (Western Cape)



Regarding Environmental audits during Q4 2025/2026, most non-conformances (77,09%) fell in three principles, namely:

- Minimising Negative Impacts (96 findings)
- Shifting to Alternatives (94 findings) and
- Measured and Efficient Use (86 findings)

Environmental Non-Conformances per Principle



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

Minimising Negative Impacts

The second largest area of non-conformances lies within the Minimising Negative Impacts principle, which aims to restrict production practices that degrade the environment. In general, the most significant areas of non-conformances within this principle lie with the following themes:

- Lack of measures to prevent soil contamination as a result of agrochemical run-off.
- Lack of a topographical map indicating different management units based on soil structure, and areas of high erosion and compaction risk.
- Lack of measures to protect workers, neighbours, and the environment from environmental contamination due to inadequate storage and use of fuel products.

Shifting to Alternatives

In general, the most significant areas of non-conformances within this principle lie with the following themes:

- No carbon footprint completed for at least 3 years.
- Inadequate or no plan in place to shift dependent away from chemical products towards more sustainable products.
- Inadequate energy and/or emission reduction plan with realistic targets.

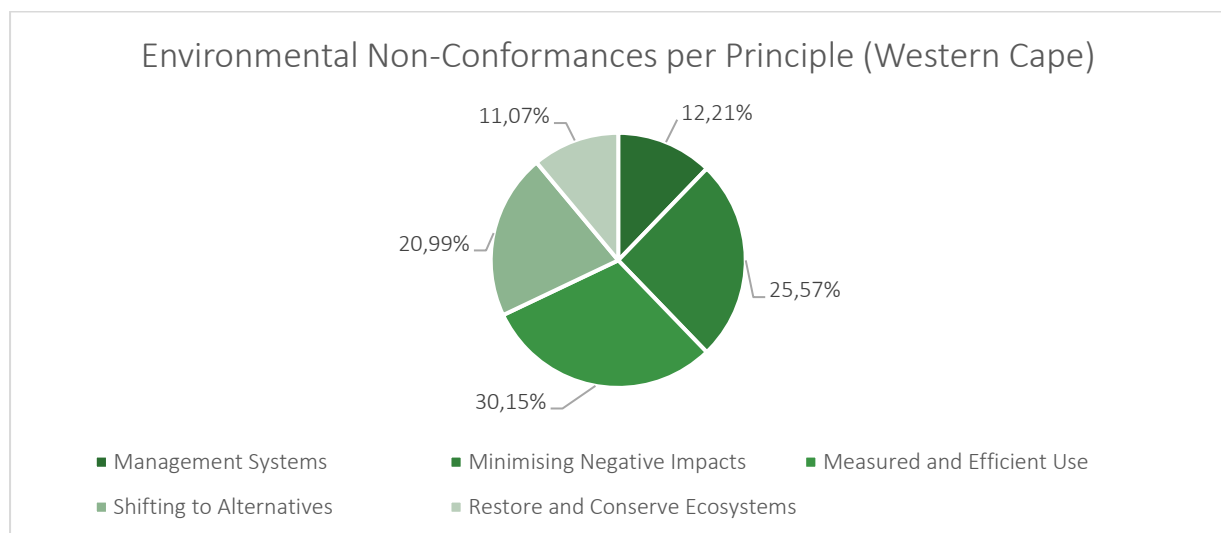
Measured and Efficient Use

The largest area of non-conformances lies within Measured and Efficient Use, where recordkeeping of production inputs should be used to gather baseline data from and track progress to improve resource use efficiency. In general, the largest areas of non-conformances within this principle lie with the following themes:

- No proof of carbon footprint calculations or a system in place indicating working towards calculating their carbon footprint. SIZA recognises this area of non-conformance and has established SIZATrack360 as a suitable solution to remedy this issue.
- No evidence of an overall reduction of waste intensity measured in Kg of waste per Kg of produced commodity.
- No implementation of targets to reduce waste production and to enhance re-use and recycling.

For the Western Cape in Q4 2025/2026, most non-conformances (76,72%) fell into three principles, namely:

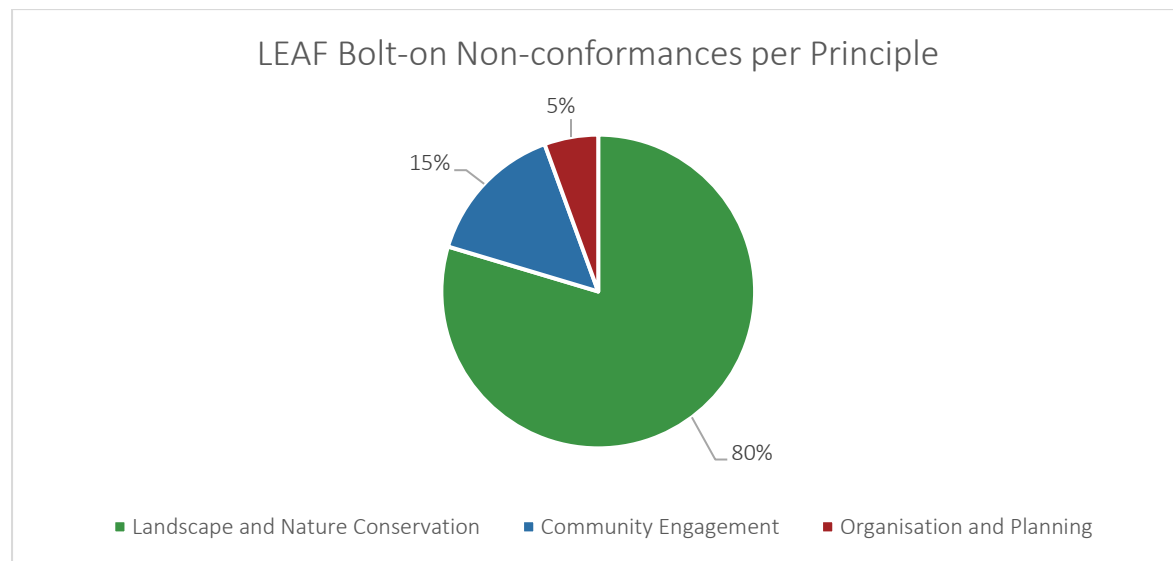
- Measured and Efficient Use (79 findings)
- Minimising Negative Impacts (67 findings) and
- Shifting to Alternatives (55 findings)



The LEAF Bolt-On option requires the monitoring of non-conformances according to the following categories:

- Landscape and Nature Conservation (43 findings)
- Community Engagement (8 findings) and
- Organisation and Planning (3 findings)

The below graph depicts the proportions of non-conformances found during combined audits conducted on the LEAF Bolt-On. This graph indicates that most non-conformances occur within the Landscape and Nature Conservation principle (80%).



Risk Category Distribution: SIZA Social and Environmental

The risk of individual suppliers is categorised using a scoring matrix that 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:

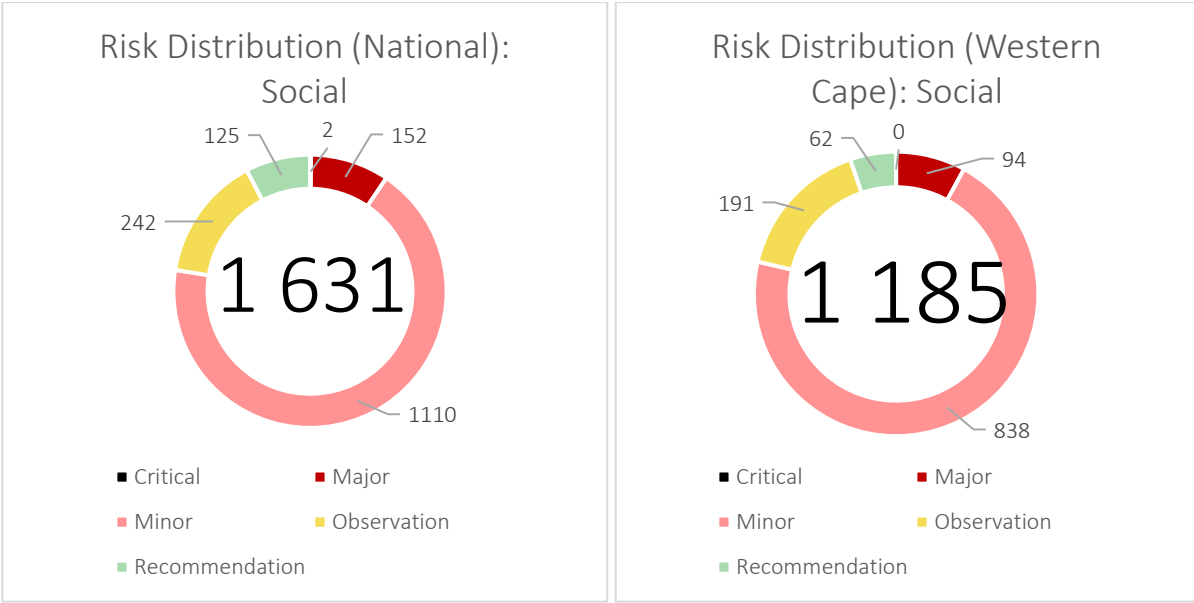
- An occasional or isolated problem.
- An issue which presents a low risk to the environment and/or workers on-site.
- A policy issue or misunderstanding where there is no evidence of a material breach.

A major non-compliance is:

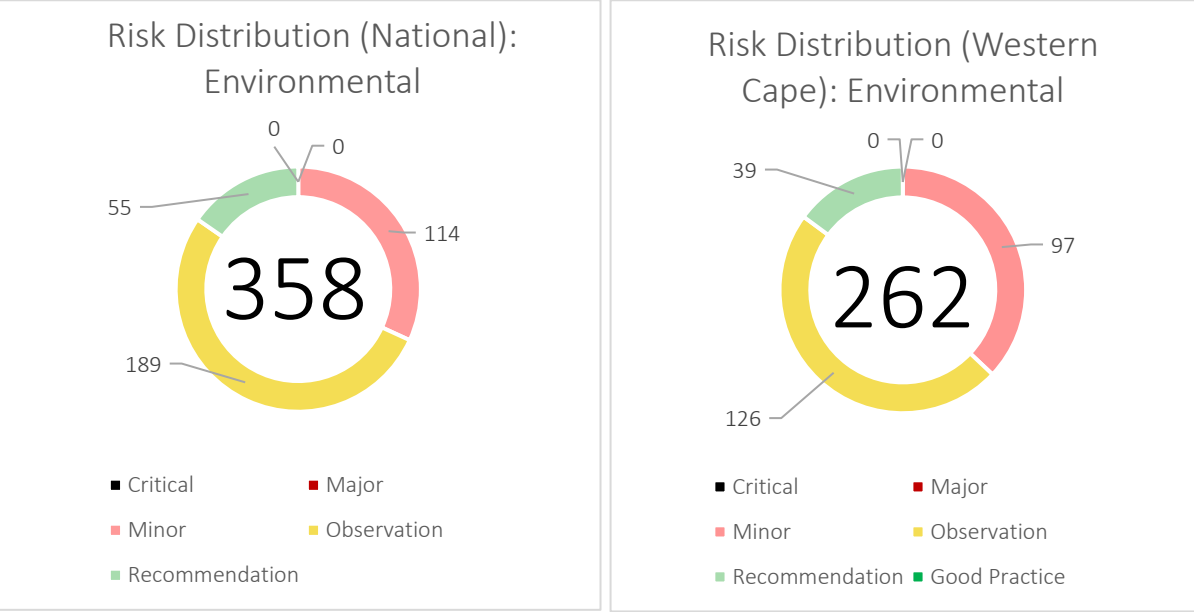
- A breach which represents a danger to the environment and/or workers/those on site.
- A material breach of a code requirement/law.
- A systemic violation of a code requirement/law.

A critical non-compliance is:

- An issue which presents imminent risk to the environment and/or 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 the supplier's commitment to resolve the issue.
- An attempt to pervert the course of the audit through fraud, coercion, deception, or interference.

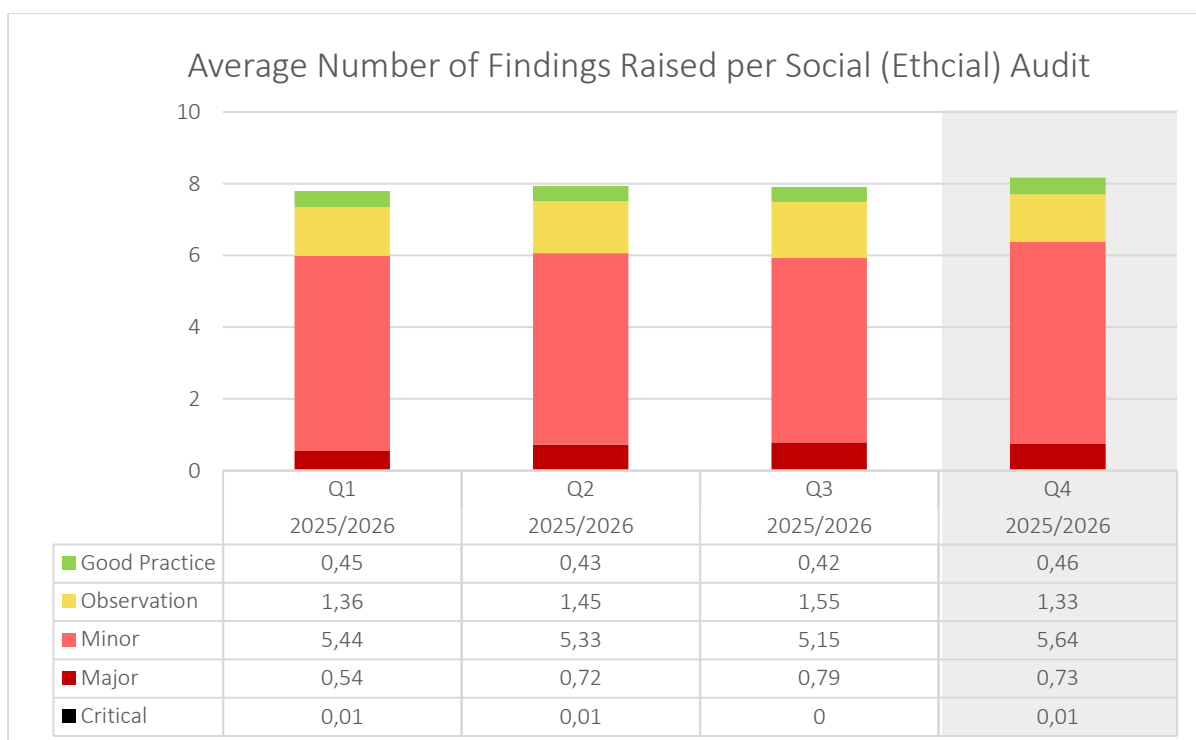


The graph above depicts the risk distribution regarding Social audits in the Western Cape for Q4 2025/2026, indicating that a majority of findings are either Minors (838) or Observations (191). The graph below similarly depicts the risk distribution regarding Environmental audits in the Western Cape for Q4 2025/2026, indicating that most findings are categorised as Observations (126) or Minors (97).

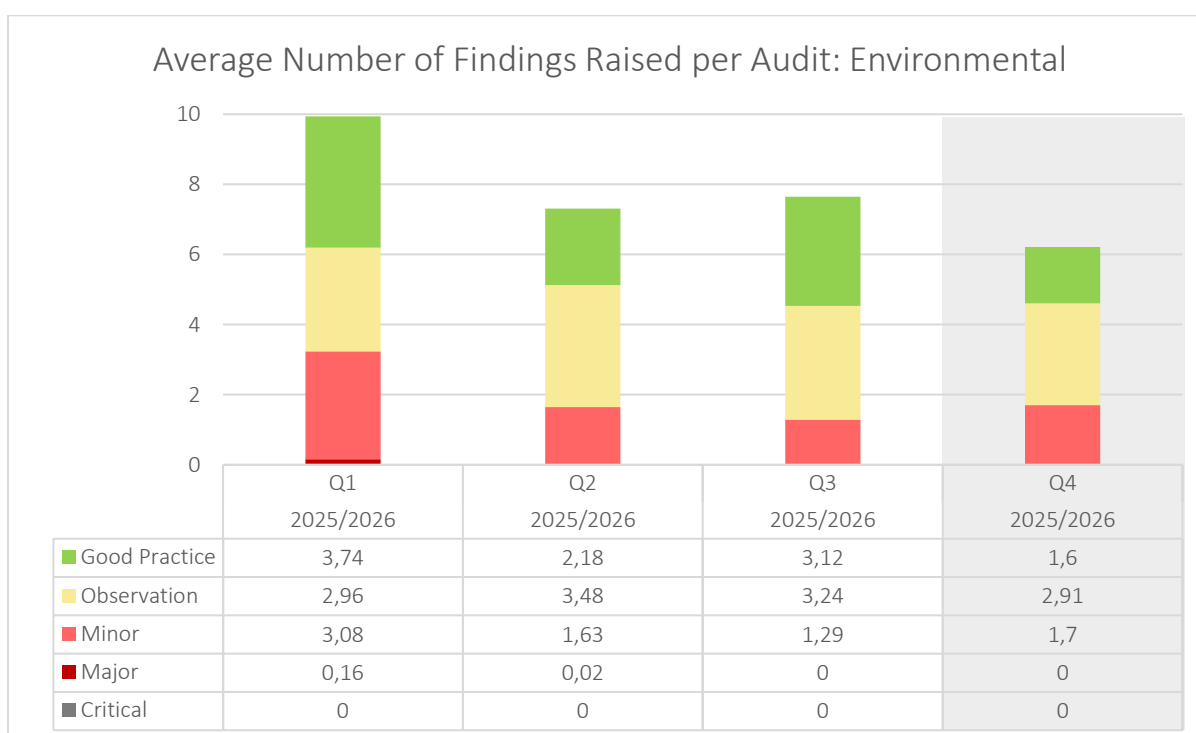


Average Findings per Social and Environmental Audit

The graph below indicates the average number of findings raised per Social audit. During Q4 of the 2025/2026 reporting period, an average of 7,71 findings were raised per Social audit (not including good practices). For the Western Cape, the average number of findings was slightly lower, at 7,12 findings per audit. This indicates the agricultural industry’s improved implementation of socially responsible practices within their businesses, as the average is less than 10 findings per audit.



The graph below indicates the average number of findings raised per Environmental audit. During Q4 of the 2025/2026 reporting period, an average of 4,61 findings were raised per audit, with an average of 1,6 Good Practices per audit. For the Western Cape, the average number of findings was slightly higher, at 4,71 findings per audit on average, with an average of 1,71 Good Practices per audit.



In line with the average number of findings for audits conducted in Q4 2025/2026, the average risk rating for Social and Environmental Audits is Platinum. 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 are raised. Despite many subscribers receiving a Platinum risk rating, the high number of non-conformances results in an average Gold risk rating. The overall risk rating of a SIZA subscriber is calculated on the SIZA Audit Frequency Risk Matrix.

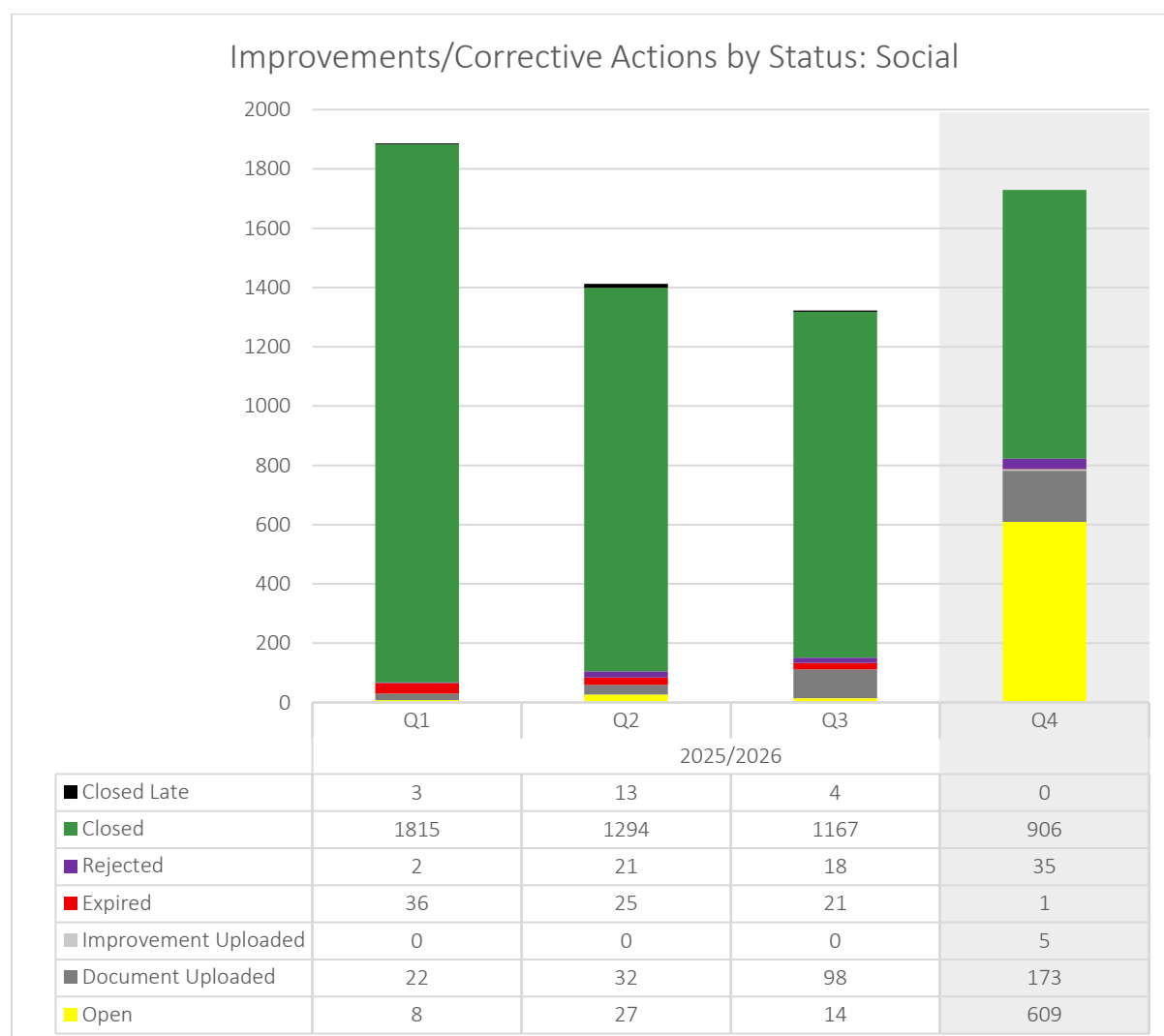
4. COMPLIANCE IMPROVEMENT

4.1. Implementation of Improvements

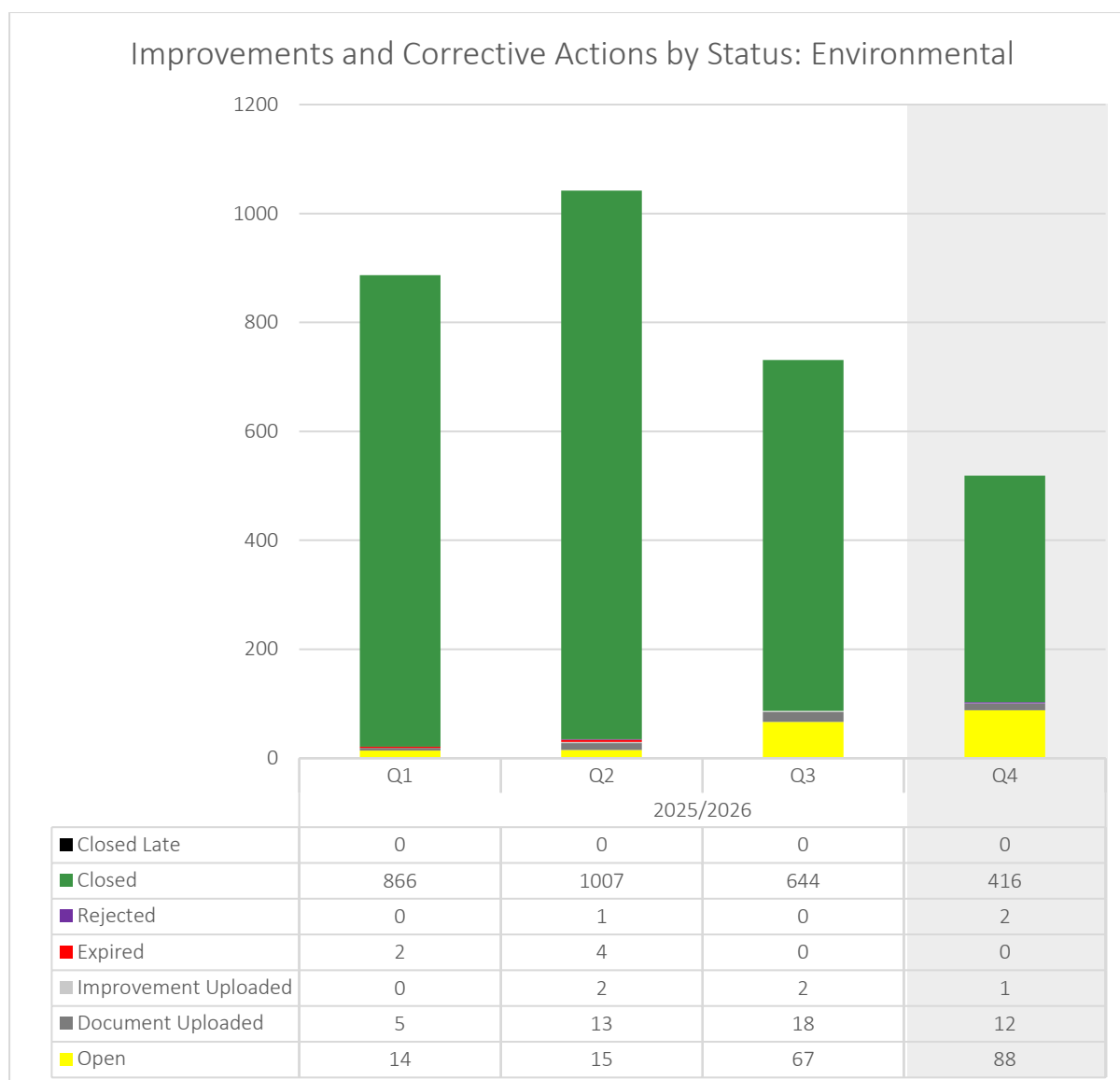
Corrective Actions Taken

As a continuous improvement programme, SIZA places strong emphasis on addressing audit findings promptly, as timely submission and resolution of corrective actions not only reflect a supplier's commitment to compliance and improvement, but also maintain audit validity, reduce the frequency of future audits, and ultimately drive positive change within individual businesses and the broader agricultural industry—benefiting both the workforce and the environment.

The graph below indicates how the social non-conformances have closed out over time. Expired non-conformances will result in a follow-up audit within 12 months following the audit date, while open non-conformances indicate that the supplier still needs to upload corrective action(s) to demonstrate improvement.



Similar to the above, the graph below indicates how Environmental non-conformances are closed out over time. The average number of findings per Environmental audit has increased (see section 3.5.7) despite the total number of Environmental audit findings decreasing since the previous reporting quarter. This is due to a decline in the number of total audits conducted per quarter (see section 3.1). One should note that the implementation of Environmental corrective actions is more tedious than for Social corrective actions, resulting in longer timescales for corrective actions to be completed, hence the notable number of corrective actions that remain open since Q3.

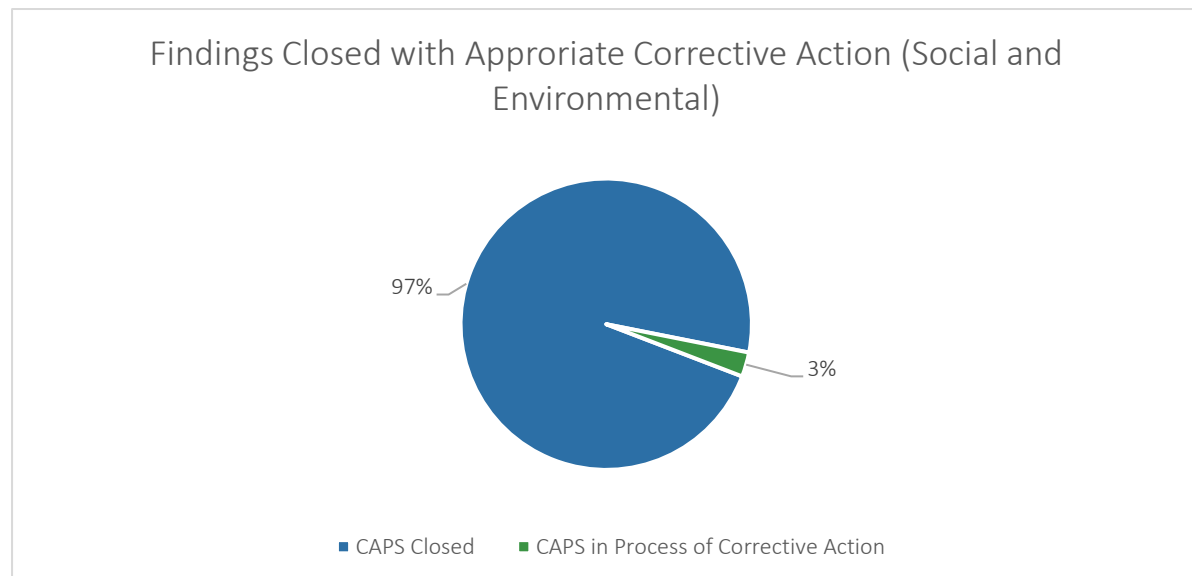


Completing corrective actions after an audit is essential, as it demonstrates a site’s commitment to ongoing improvement and meaningful change. Audits are not just about identifying issues—they aim to drive measurable progress supporting industry transformation and South Africa’s alignment with the UN Sustainable Development Goals. Global buyers also expect tangible improvements as part of managing supply chain risks. The SIZA programme supports this by limiting audit validity if corrective actions are not uploaded within the agreed timeframe, regardless of the site’s risk rating. Ultimately, the audit is just the beginning—the real impact lies in the corrective actions that follow, which foster sustainable, socially responsible practices and continuous growth.

If one looks at the improvement that has taken place over time, it is worthwhile to look at the findings raised from 1 April 2016 until 31 March 2025. A total of 63 180 findings were raised during third-party audits, and 61 418 of these findings have already been successfully closed out and received improvements in practices. This means that 97,21% of all findings have been adequately resolved since 2016.

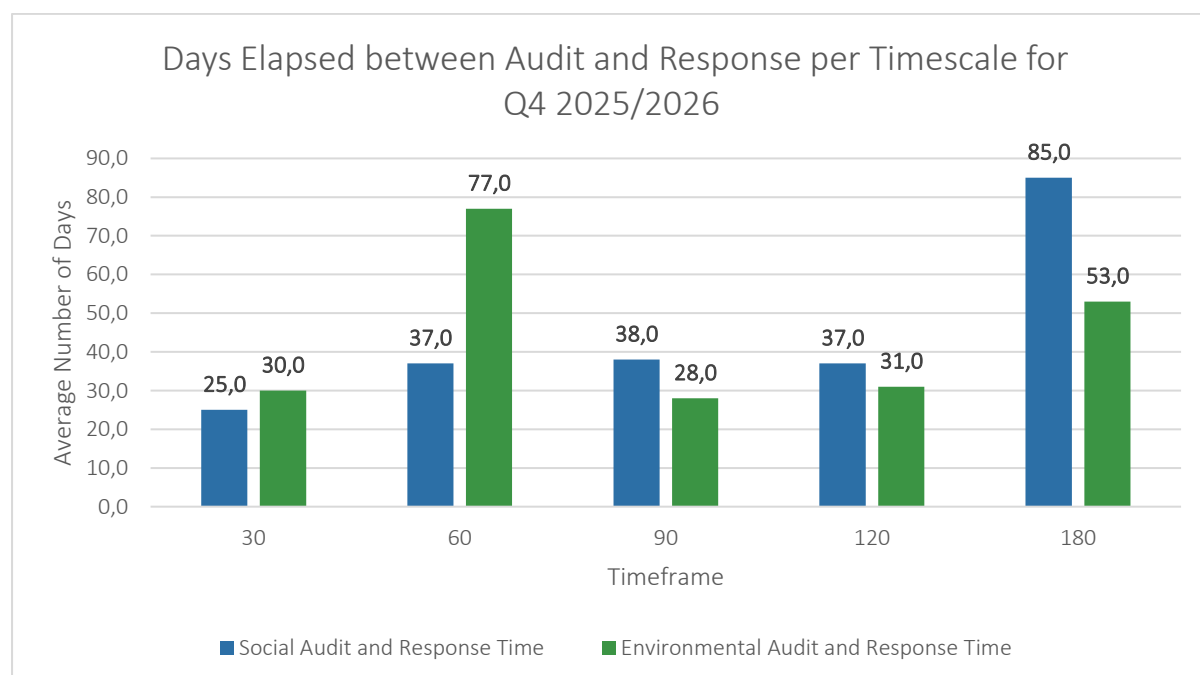
In the 2025/2026 financial period, a total of 6 349 findings were raised during third-party audits, compared to 6 554 in the 2024/2025 financial period, representing a 3,12% decline in total findings. This showcases the continuous improvement of suppliers across the board doing better with each audit. Despite the number of total annual findings declining, the average findings per audit increased for Environmental audits from 2,68 findings in 2024/2025 to 5,12 findings per audit in 2025/2026 (a 9,1% increase). This is indicative of auditors being better calibrated and being able to audit more comprehensively. The average number of findings per Social audit also increased from 7,34 findings in 2024/2025 to 7,52 findings in 2025/2026 (a 2,3% increase).

It is worth noting that third-party auditors allocate a specific timeframe to each corrective action. A supplier may receive a 30- to 180-day period to submit a particular corrective action, and therefore, the corrective actions of the most recent audits may still be open.

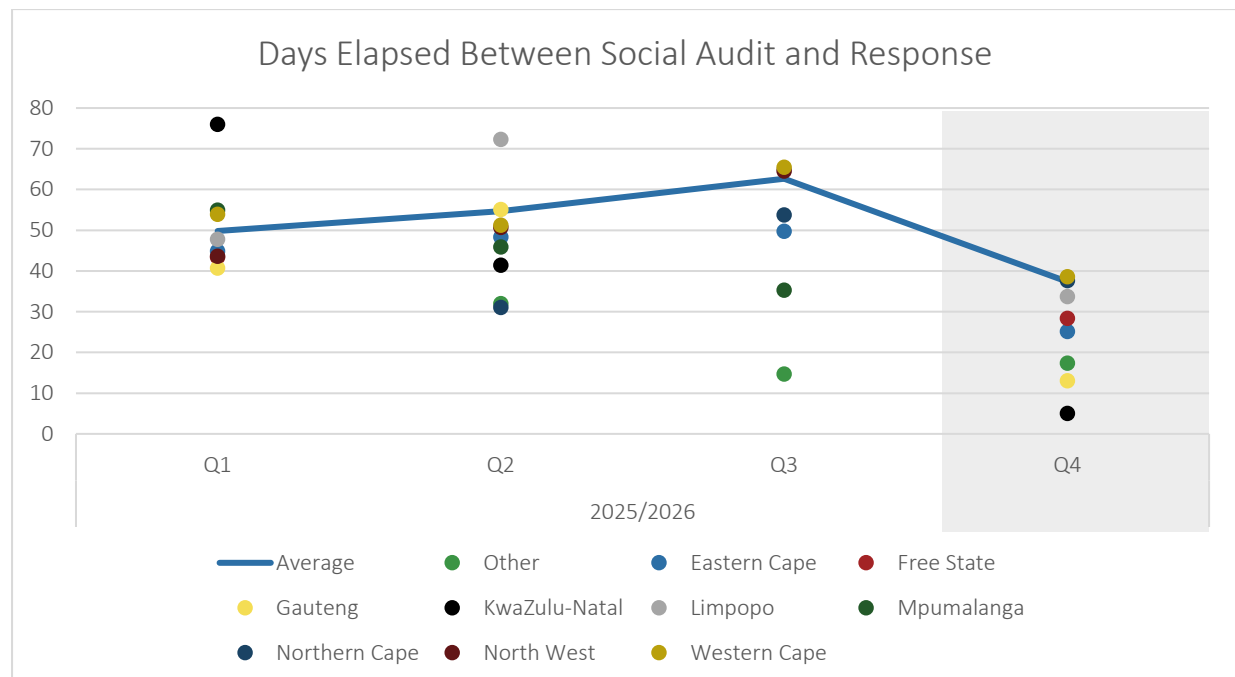


Time Elapsed Before Corrective Actions are Closed

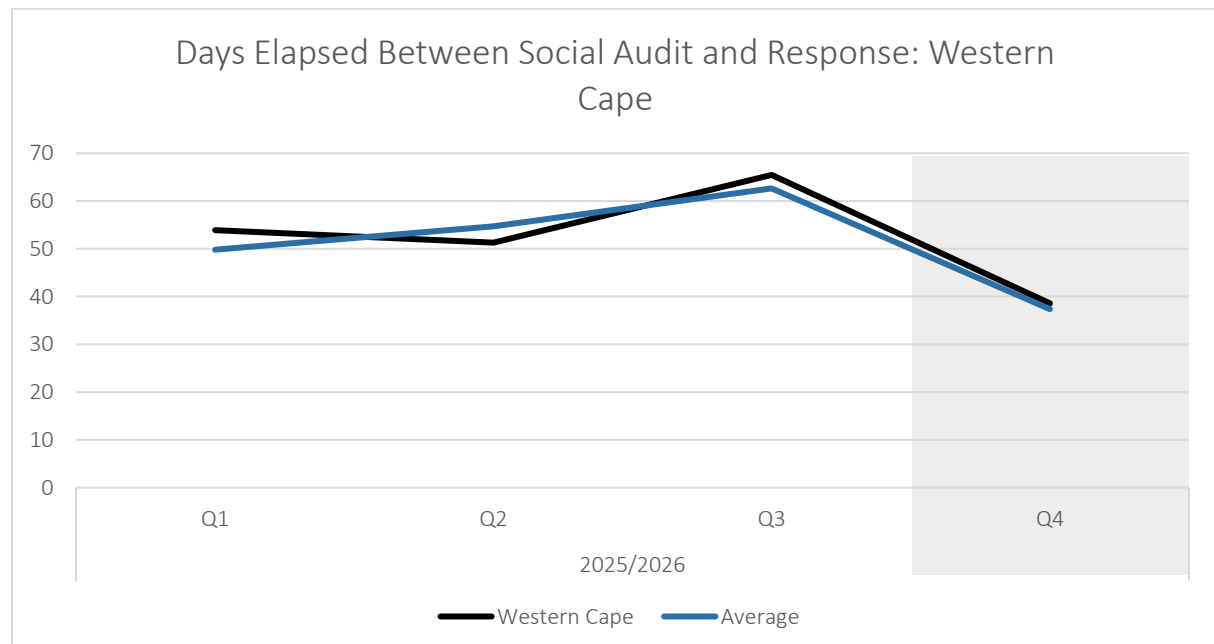
As mentioned, third party auditors may allocate a 30- to 180- day period for suppliers to submit their corrective actions. The timescale allocated to each finding is up to the discretion of the auditor. The graph below shows the average number of days between an audit and the implementation of corrective actions per audit type per time scale in Q4 of 2025/2026. It is clear that on average, suppliers are implementing corrective actions well within their designated timescales. Suppliers with a 60-day timescale for Environmental audits, on average, took 77 days to submit a response, due to a single late audit response. This is because SIZA does not issue an Audit Completion Letter until all corrective actions have been closed out, hence proactively driving continuous improvement. Notably, no Environmental Audits were allocated a 90-day timescale.



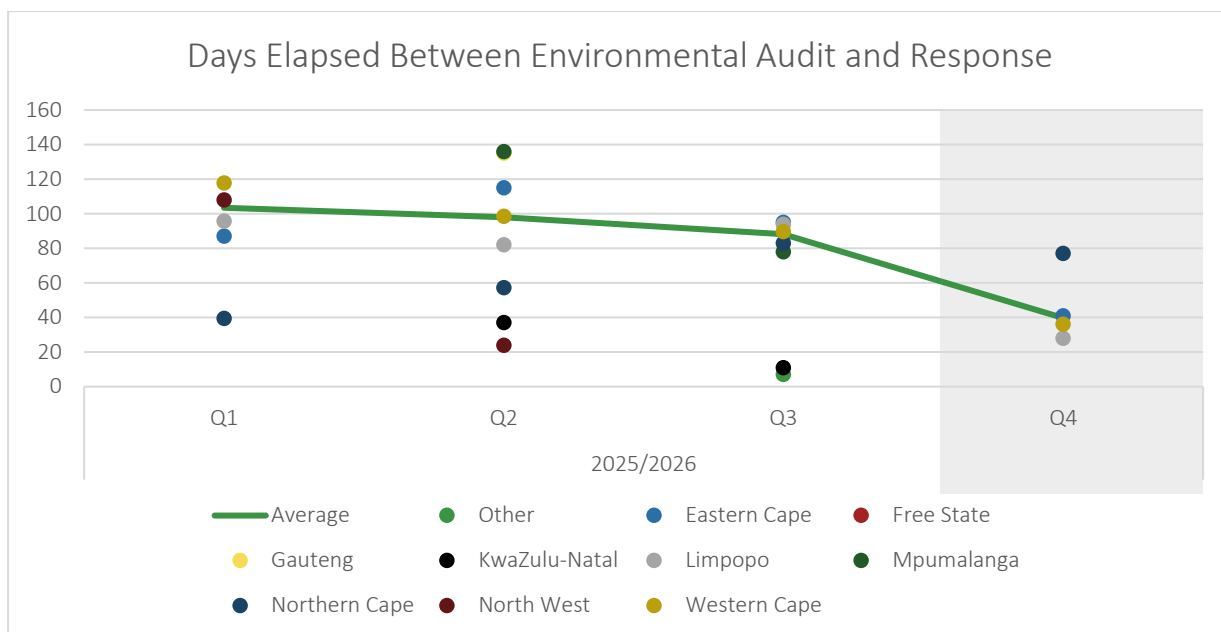
The graph below illustrates the average time delay between social audit findings and the implementation of corrective actions. The average number of days between the Social audit and the implementation of corrective actions has decreased from 49,83 days in Q1 of 2025/2026 to 37,36 days in Q4 of 2025/2026.



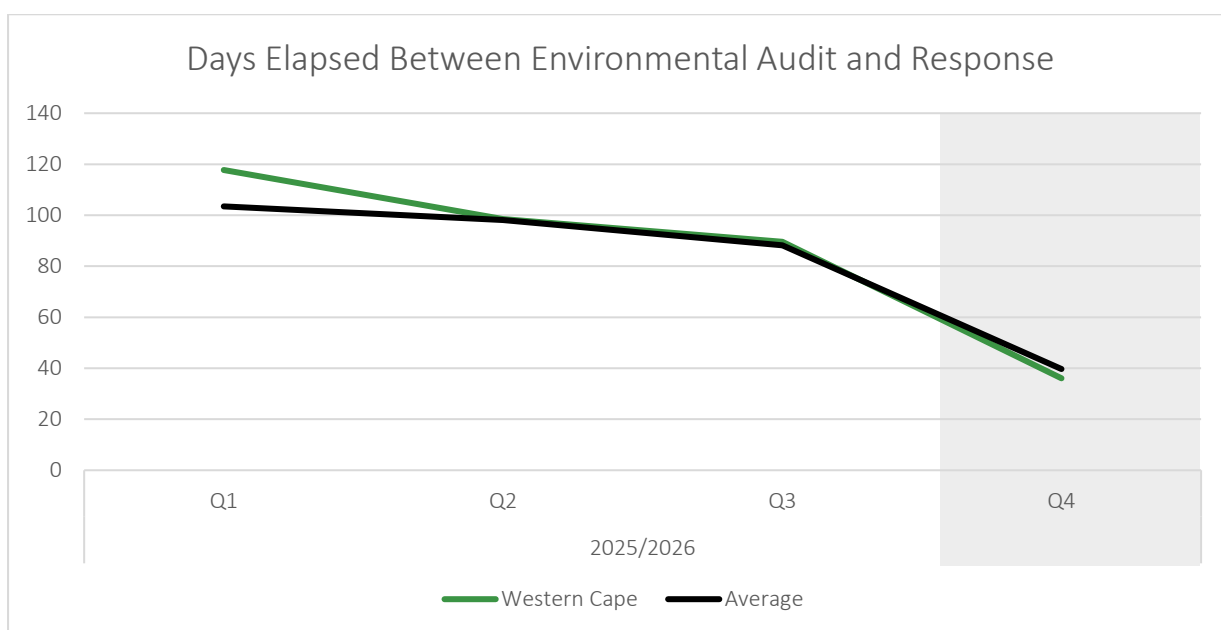
The Western Cape has largely followed the national trend regarding the duration of corrective actions on Social audits, declining from an average of 53,93 days in Q1 of 2025/2026 to an average of 38,57 days in Q4 of 2025/2026.



The below graph illustrates the average time delay between environmental audit findings and the implementation of corrective actions. The average number of days between Environmental audit and the implementation of corrective actions has decreased from 103,46 days in Q1 of 2025/2026, to 39,70 days in Q4 of 2025/2026. This implies that corrective actions are being implemented at a quicker rate than in previous reporting periods. The recent decline in the duration of audit responses can be attributed to more frequent follow-ups on non-completed audits to ensure that corrective actions are closed out promptly.



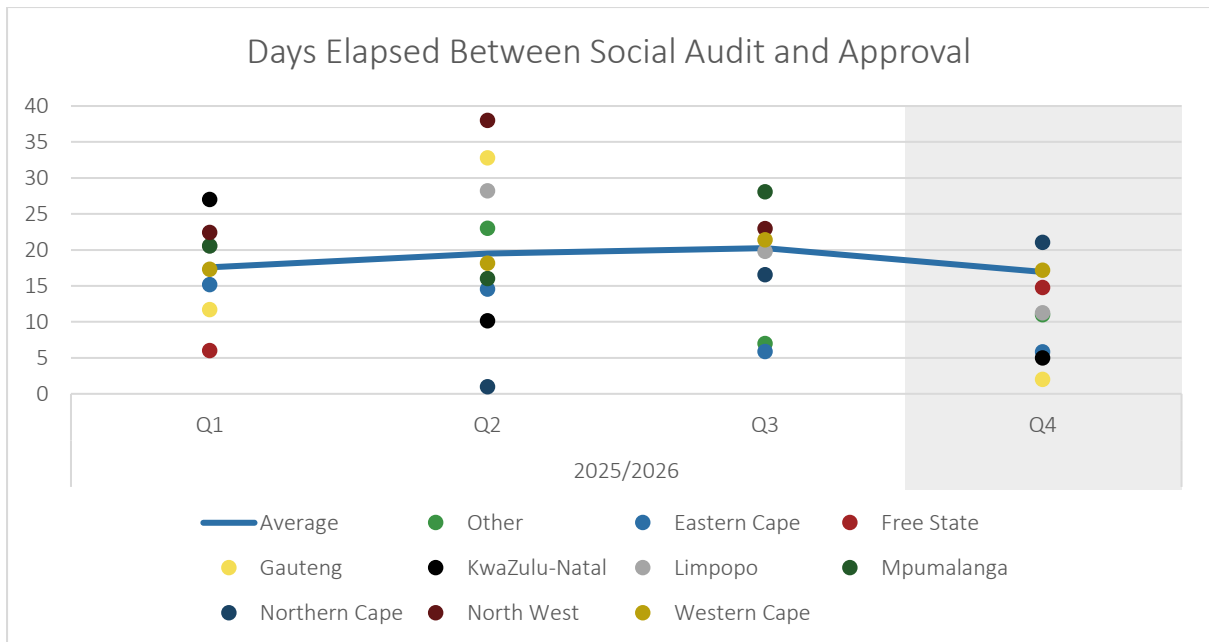
The Western Cape has by-and-large driven the national trend since 2022/2023. Overall, this suggests that the industry, at both a national and provincial level, has an appetite for environmental compliance and is embracing continual improvement promptly. The Western Cape’s average days between environmental audit and corrective actions response declined from 117,72 days in Q1 of 2025/2026 to 36,056 days in Q4 of 2025/2026.



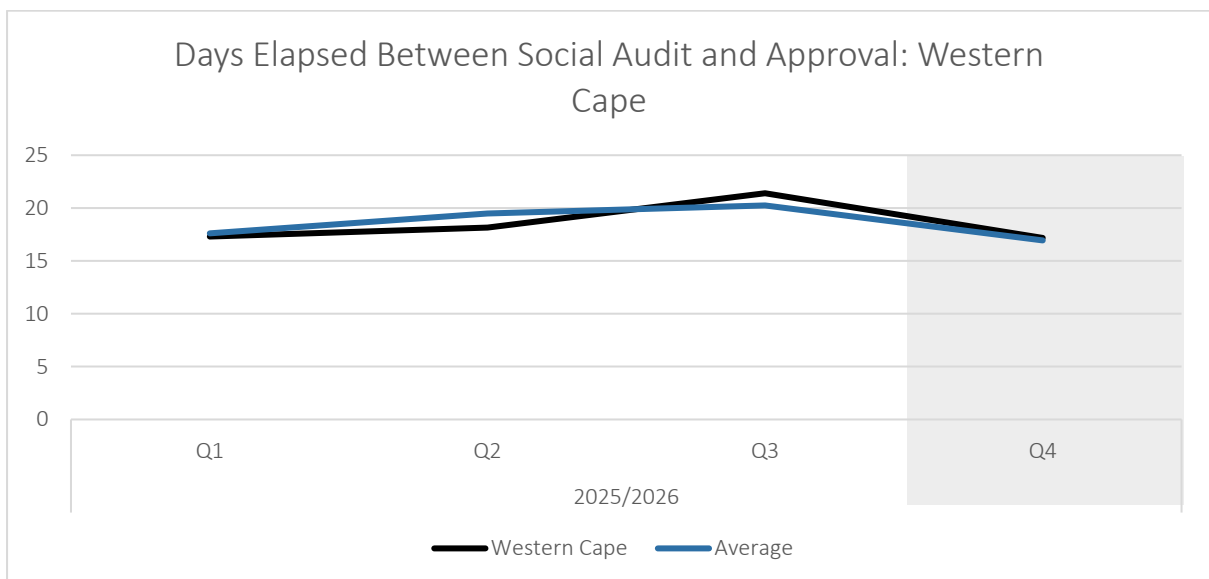
Time Elapsed Before Audit Approval and Completion

The Audit Process and Methodology (APM) requires auditors to publish the audit report within 10 business days of the audit on the MySIZA platform. Accounting for non-business days (i.e., weekends), this implies that the average duration between any audit and its approval should be approximately 14 days. Here, a declining trend in the number of days elapsed is seen as a positive outcome, as audit reports are being approved at a quicker rate.

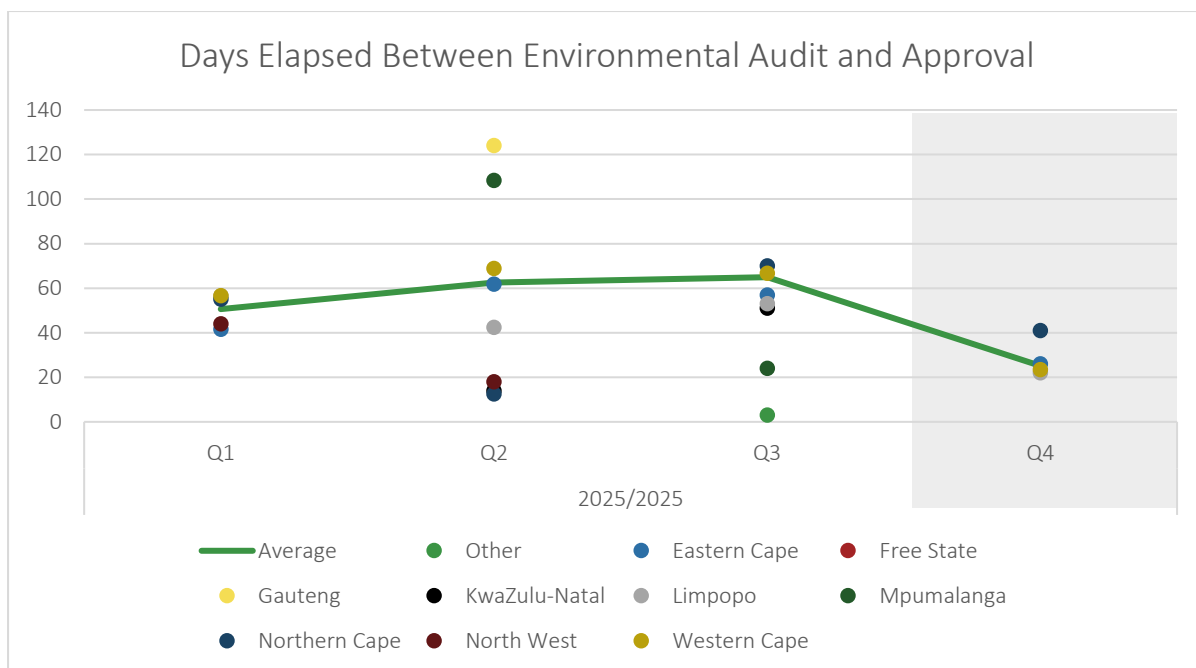
The graph below depicts the number of days elapsed between the Social audit end date and the audit approval date. The average number of days between the end of an audit and its approval declined from 17,60 days in Q1 of 2025/2026 to 16,94 days in Q4 of 2025/2026.



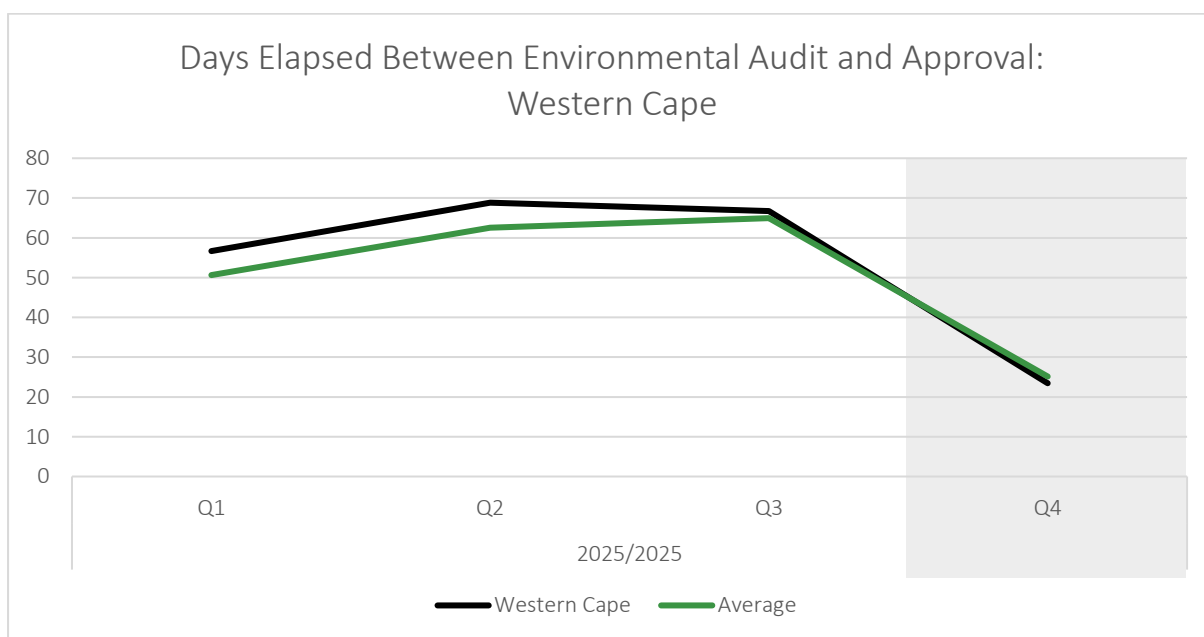
As mentioned above, the Western Cape has largely driven the national, with the time between a Social audit and approval declining from an average of 17,30 days in Q1 of 2025/2026 to an average of 17,18 days in Q4 of 2025/2026.



The graph below depicts the number of days elapsed between the Environmental audit end date and the audit approval date. The average number of days between the end of an audit and its approval decreased from 50,63 days in Q1 2025/2026 to 25,13 days in Q4 2025/2026.



Focusing on the Western Cape, as per the graph below, it is clear that the Western Cape is the main driver of these national averages, with an average of 56,63 days between audit findings and approval in Q1 of 2025/2026, declining to an average of 23,44 days in Q4 of 2025/2026.



4.2. Auditor Capacity

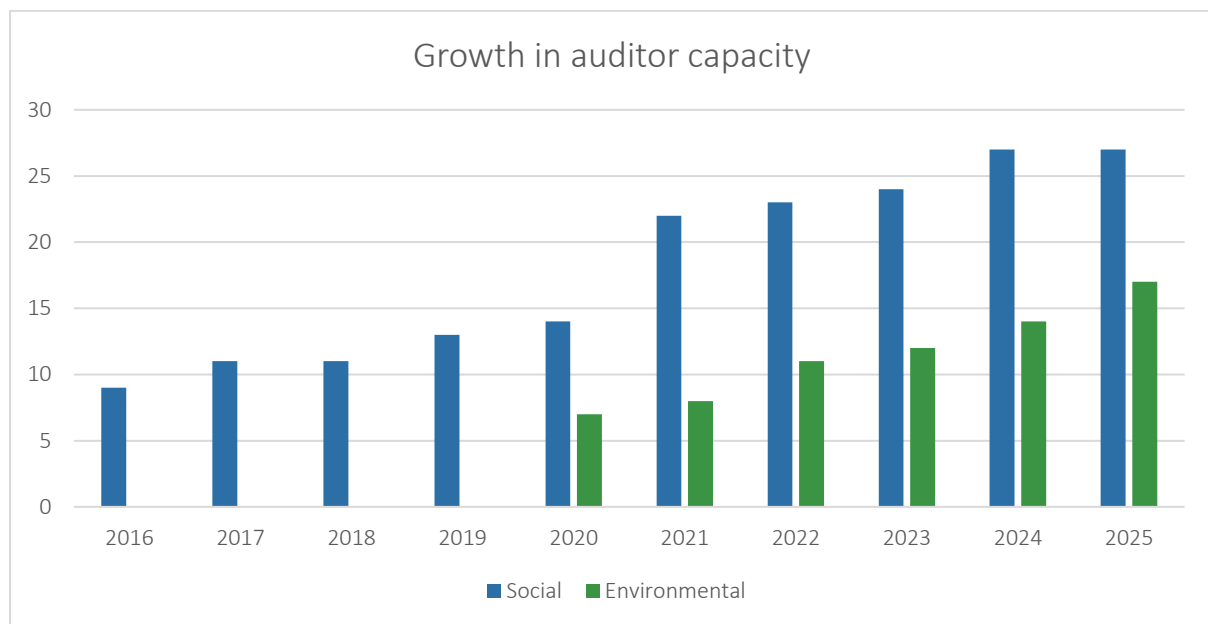
SIZA third-party audits have increased over the last several years to an average of approximately 800 Social audits per year, and 600 Environmental audits per year. It is important to take note of a variety of factors that may influence the number of SIZA audits in the future. Factors that should be considered are:

- The increase in market demand for compliance audits
- The growth in market acceptance of SIZA Standard and programme
- Shorter audit frequency (based on market demand)

- SIZA accommodating commodities, beyond fruit (all of agriculture potentially)

With the increase, SIZA has worked with the independent third-party audit firms to ensure auditor capacity is provided for. Currently SIZA recognised seven (7) independent third-party certification bodies who audit on the SIZA Social and Environmental Standards. The various firms can be viewed here: <https://siza.co.za/recognised-audit-firms/>. Of these, one firm is located in KwaZulu-Natal, 3 are located in Gauteng, and 3 are located in the Western Cape, with auditors living in the Western Cape, Gauteng, Eastern Cape, Northern Cape, and KwaZulu Natal.

The number of lead Social auditors has increased from 9 individuals in 2016/2017 to 27 individuals in 2025/2026, a 200% increase over 10 years. Within this time, the number of audit firms who can conduct SIZA Social audits increased from 4 to 7 firms. The number of Environmental lead auditors has increased from 7 individuals in 2020 to 17 individuals in 2025, a 143% increase over 6 years. In that time, the number of audit firms who can conduct SIZA Environmental audits increased from 2 to 5 firms. The below graph illustrates the growth in auditor capacity for auditors who can conduct SIZA Social and/or SIZA Environmental audits.



The total number of auditors have increased over the past few years; however, auditors are fully booked months in advance as suppliers arrange audits at least 3 to 6 months ahead of their season already. It's further important to note that auditors travel for audits, write reports, audit on other programmes, spend more than one day on some sites etc. which are all factors impacting capacity and availability. Other factors that impact third-party auditor capacity are:

- Lifespan (how long do auditors stay in the business)
- How regular do auditors audit (do they have another form of income)
- Areas auditors reside (to ensure travel costs can be maintained at a reasonable price for members)
- Training and monitoring of auditors (how long does it take to become a recognized SIZA auditor, along with meeting the requirements of APSA).

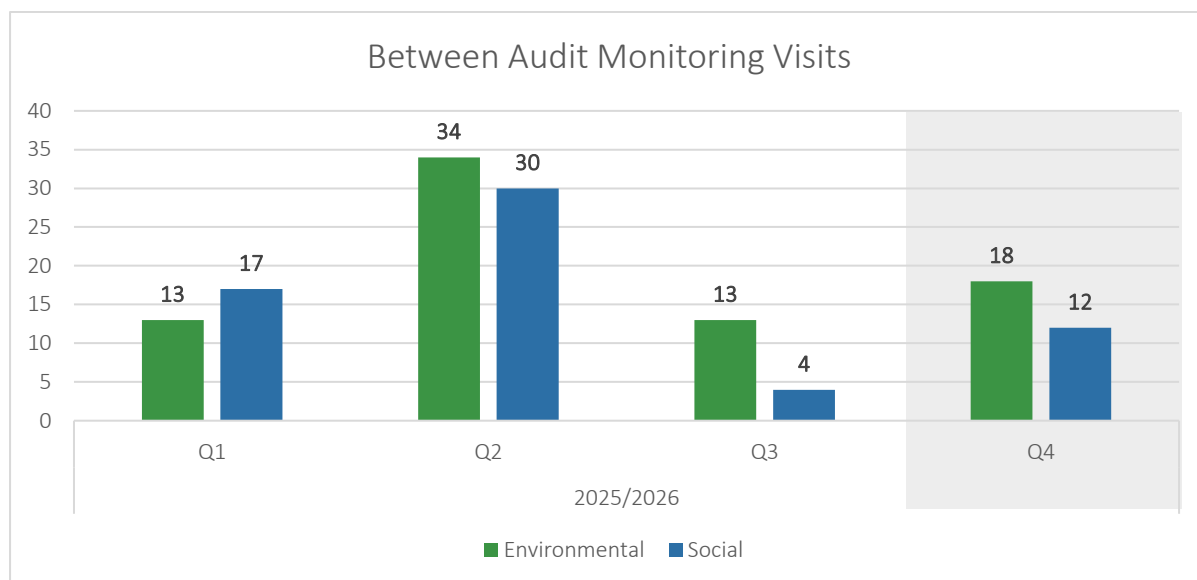
4.3. Between Audit Monitoring

Between Audit Monitoring Programme

As part of the drive for continuous improvement, SIZA facilitates social and environmental between audit monitoring visits as part of its audit oversight programme to ensure that suppliers maintain compliant practices between third-party audit periods. As the SIZA programme incentivises suppliers with the potential of achieving a 2 or 3 year audit validity period when they do well during third-party audits, additional oversight is created to

drive a consistent approach towards the monitoring of practices which aim to assure that compliance practices on farms do not change between audit periods. During these visits, SIZA assist suppliers by identifying potential improvements and provide support and advice to improve social and environmental practices.

In the most recent reporting period, 12 Social and 18 Environmental verifications took place. Of these, all Social and Environmental verifications occurred in the Western Cape. Year to date, a total of 78 Environmental and 63 Social verifications took place.



5. SIZATRACK360 *(Sustainability data and digital tracking)*

As a supplier in South Africa, staying ahead in the highly competitive agricultural sector requires more than just a green thumb. Credible digital data on compliance is vital for retailers, importers, and buyers, as it provides transparency, enables real-time monitoring, mitigates risks, and facilitates effective collaboration. The SIZATrack360 programme helps suppliers, packhouses, and processing facilities track their production inputs and outputs.

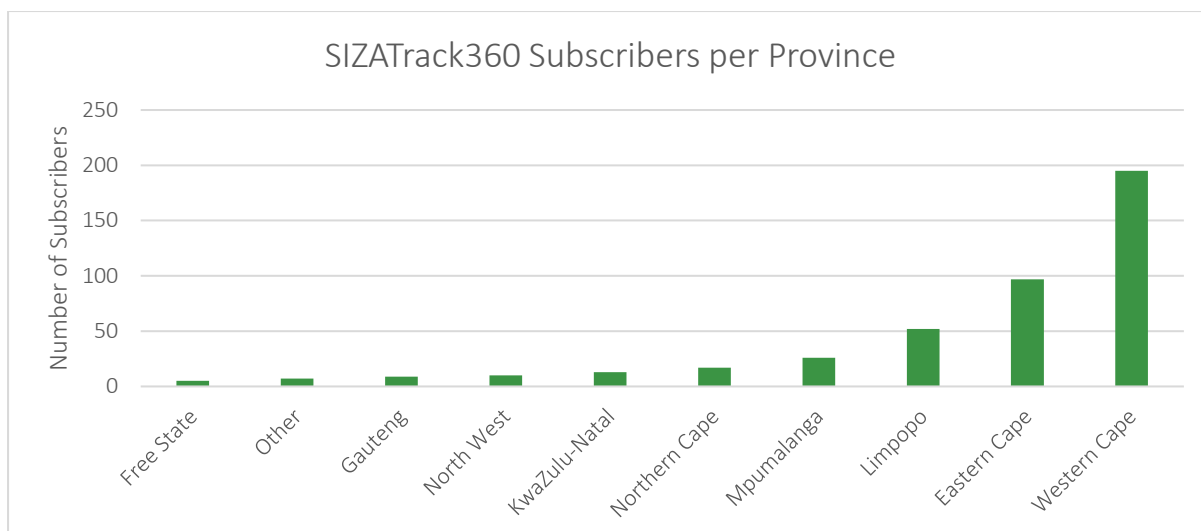
Effective recordkeeping and traceability of production inputs and outputs are essential for driving continuous improvement, operational efficiency, and profitability in the agribusiness sector. The innovative SIZATrack360 Programme enables users to monitor key areas, including production, water use, fuel, fertilisers, chemicals, and waste. It also supports carbon footprint calculations, meeting global buyer requirements, as SIZA provides visibility through the MySIZA Platform and empowers suppliers to evaluate and enhance their management practices.

Market and standard requirements clearly indicate that suppliers must begin calculating their carbon footprint. Although SIZA does not require the use of the SIZATrack360 programme solely, suppliers should be able to demonstrate during an audit that they have started their carbon footprint journey with a registered provider.

SIZATrack360 Subscriptions

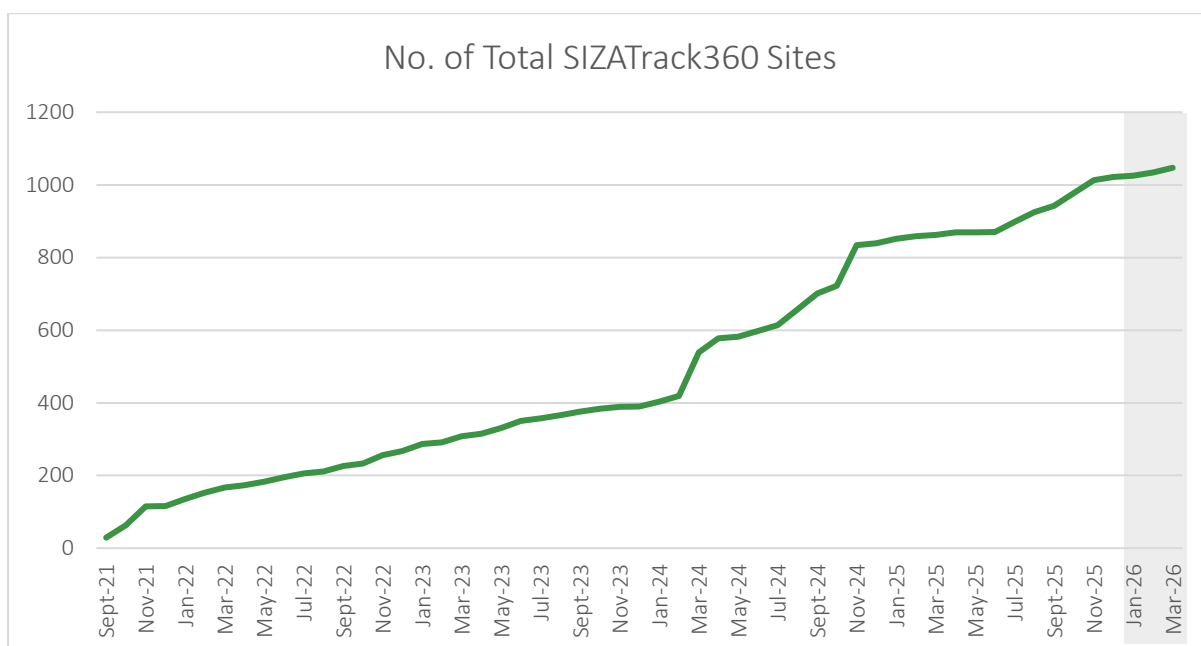
Currently, 511 subscribers, comprising over 1 047 sites, have already signed up for SIZATrack360 to capture their production inputs online. This makes up approximately 33% of all registered SIZA Environmental subscribers. Primary subscribers who signed up for SIZATrack360 receive training before setting up their profile, as the correct information must be used from the start.

Increasing interest and queries in the SIZATrack360 programme will likely lead to an increase in subscribers for the new reporting year, as market requirements for reduced Greenhouse Gas emissions become stronger and South African Carbon Tax requirements become clearer. The promotion held on the programme in November 2024 also sparked users to engage with other possible new users on the topic of the programme and its effectiveness.

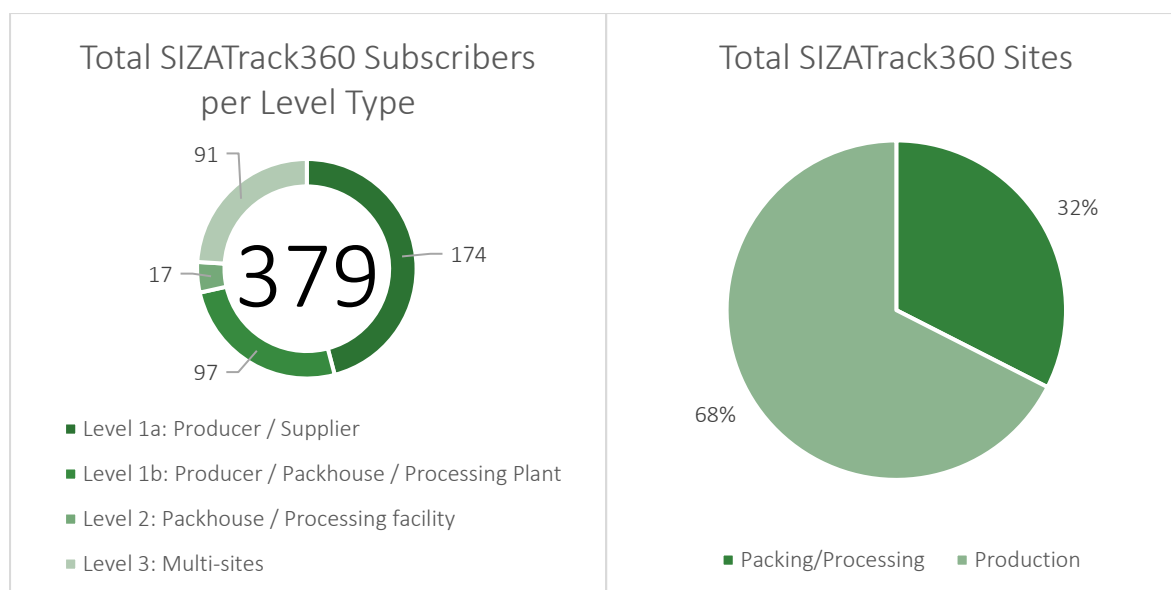


In support of the subscription totals, the SIZATrack360 registrations predominantly come from the Western Cape (45,24%), followed by the Eastern Cape (22,51%) and Limpopo (12,07%) – this is aligned with the provincial distribution of SIZA Environmental subscriptions across South Africa.

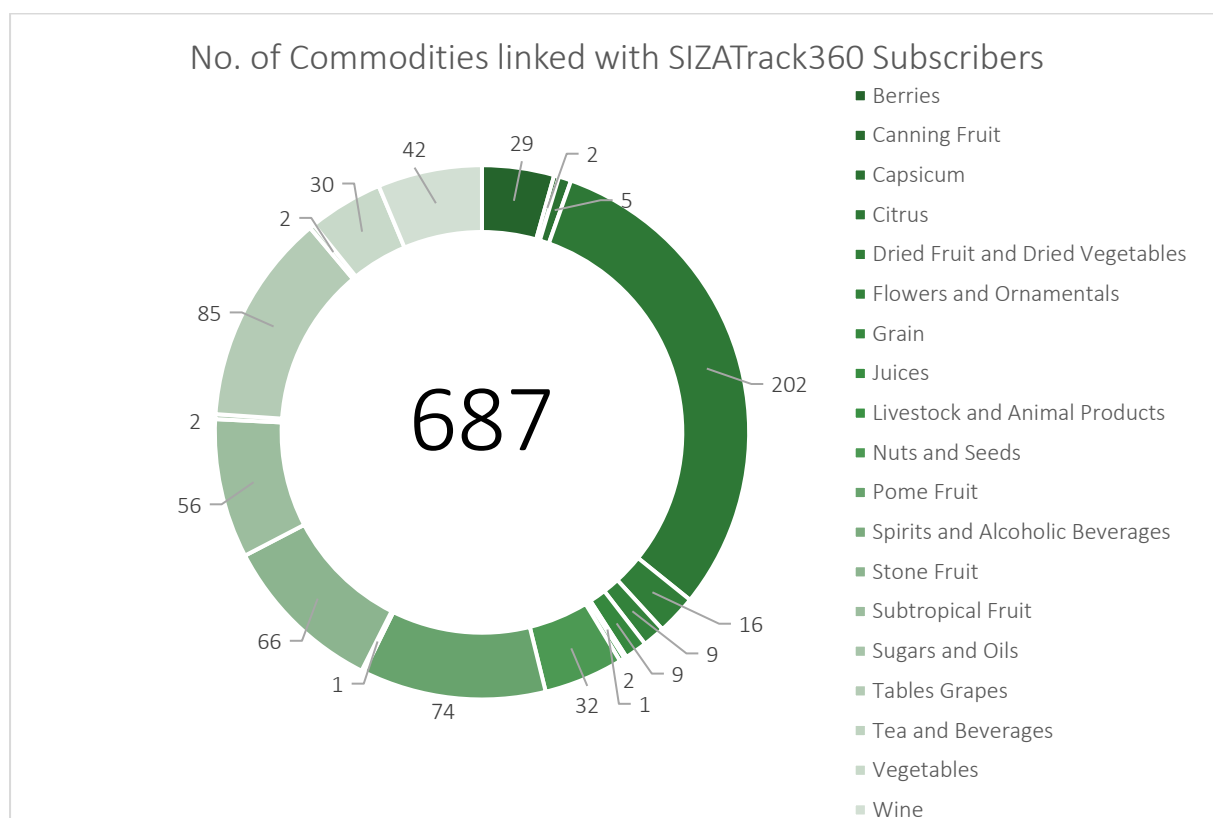
SIZA is committed to facilitating sustainable and ethical agricultural practices in South Africa. To support this mission, SIZATrack360 was launched in 2021. It aids suppliers, packhouses, and processing facilities in tracking their production inputs and outputs. The graph below shows the number of newly registered SIZATrack360 sites per month.



To date, 511 subscribers representing over 1 047 sites have already signed up for SIZATrack360 to start capturing their production inputs online. Of these, currently 379 primary subscribers are actively capturing data for 479 sites.



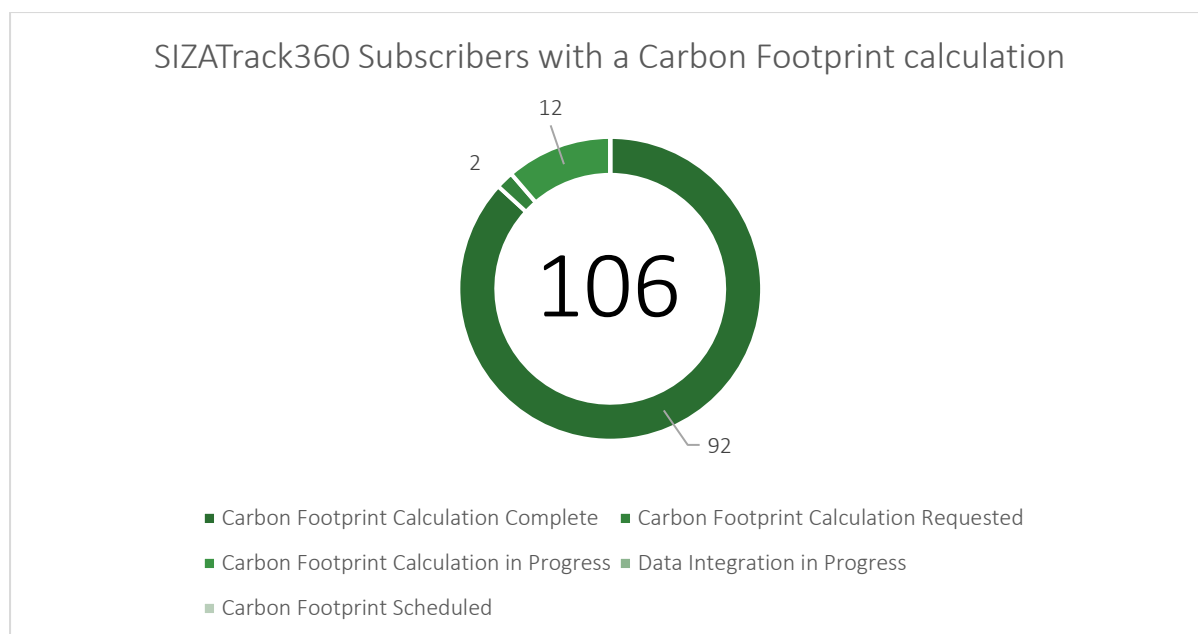
The current breakdown of SIZATrack360 subscribers per site type and per level type is also well-aligned with the site type and level type subscribers distributions of SIZA Environmental subscribers. The main distributions of SIZA Environmental subscribers are producer/supplier subscribers (Level 1a), at 45,91%, followed by producer/packhouse/processing plant Level 1b (25,59%) and multisites (24,01%).



Interestingly, the majority of commodities linked with Digital Recordkeeping subscribers are located within the Citrus (28,21%), Table Grapes (11,87%), and Pome Fruit (10,34%) industries. This pattern is likely due to differing awareness levels of the SIZATrack360 Digital Recordkeeping Programme in each industry (for example, through adverts in fruit journals, industry forums and on-site promotions) and the different commodity seasons. After the launch and the increased drive to gain new registrations, we predict that the commodity representation will align with the overall commodity representation in general subscriptions, accounting for some fluctuation due to seasonality.

Carbon Footprint Calculations Reporting

As the majority of the data captured as part of the SIZATrack360 Digital Recordkeeping Programme also contributes to the carbon footprint of a business, SIZATrack360 includes a built-in functionality where subscribers can request their carbon footprint to be calculated via either the Confronting Climate Change (CCC) Initiative or AgrigateOne. Currently, 106 subscribers have leveraged the integration between SIZA and recognised carbon calculating platforms to request and perform Carbon Footprints. Of these, 92 SIZA subscribers have completed their Carbon Footprint calculations. It is expected that the number of carbon footprint calculations requested and completed will increase in accordance with the implementation of the Carbon Tax Act on the agricultural sector, as well as global markets starting to request lower scope three carbon emissions from suppliers, processors and packhouses to calculate their carbon footprint and formulate a carbon reduction strategy.

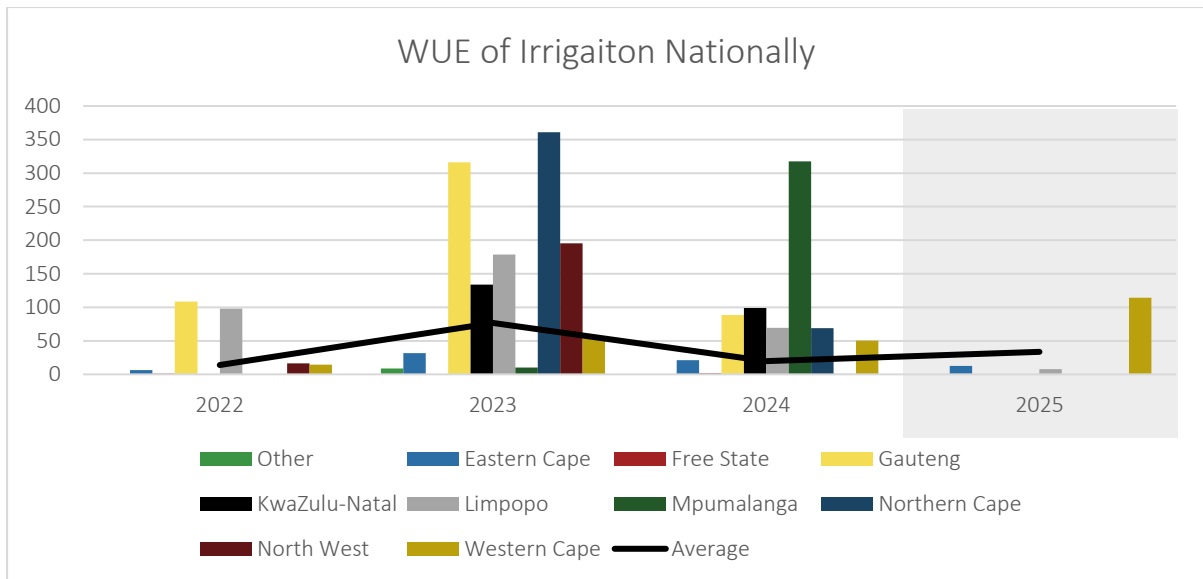


Using data accumulated from subscribers who have completed their carbon footprint calculations, we can start to see interesting trends emerging. ***As more subscribers complete their carbon footprint over multiple years, the average carbon footprint per annum will incorporate seasonal and production variance, leading to an increasingly accurate representation of the carbon footprint contributions per commodity at the production and packing levels in South Africa.***

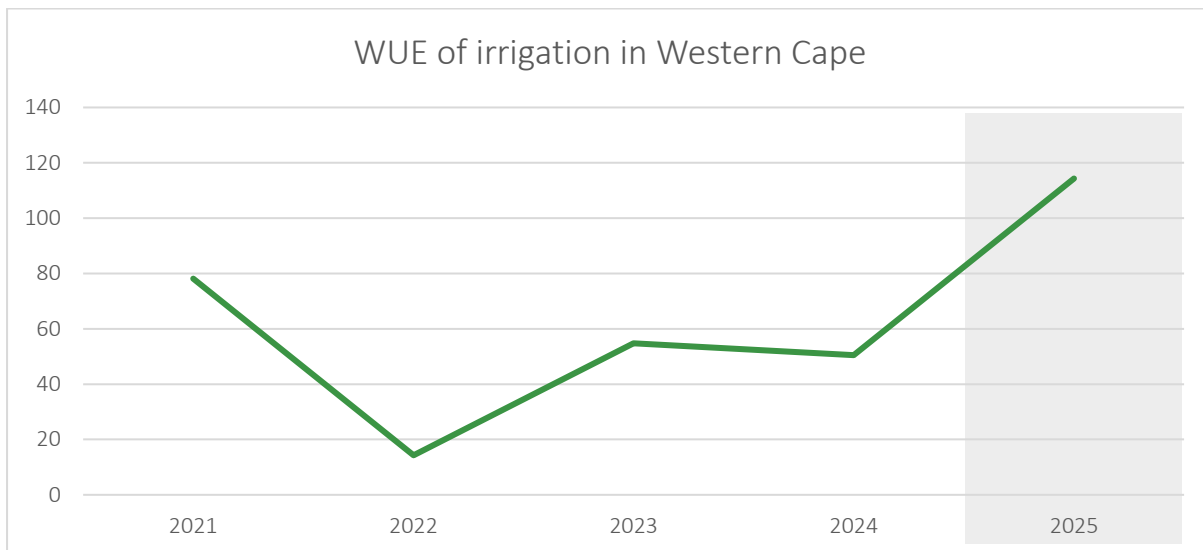
Water-use Efficiency

When presenting data from digital recordkeeping, it is important to note that not all suppliers record all of their production activities within the SIZATrack360 platform. Therefore, some years have small sample sizes or incomplete data, which may be omitted in the following analysis to preserve the findings' integrity.

The graph below depicts the water-use efficiency (WUE) for all suppliers from 2022 to 2025. At a national level, the total efficiency of irrigation has reduced from an average of 13,91 L/Kg output in 2022 to a value of 19,54 L/Kg in 2024. This further increased in 2025, but is significantly skewed due to the difference in sample size and captured cycles. Reasons behind this varying efficiency include load shedding and drought conditions, which incentivise a shift towards efficient water management strategies due to economic considerations. Other factors driving this improvement may include improving the quality of the data captured by suppliers.

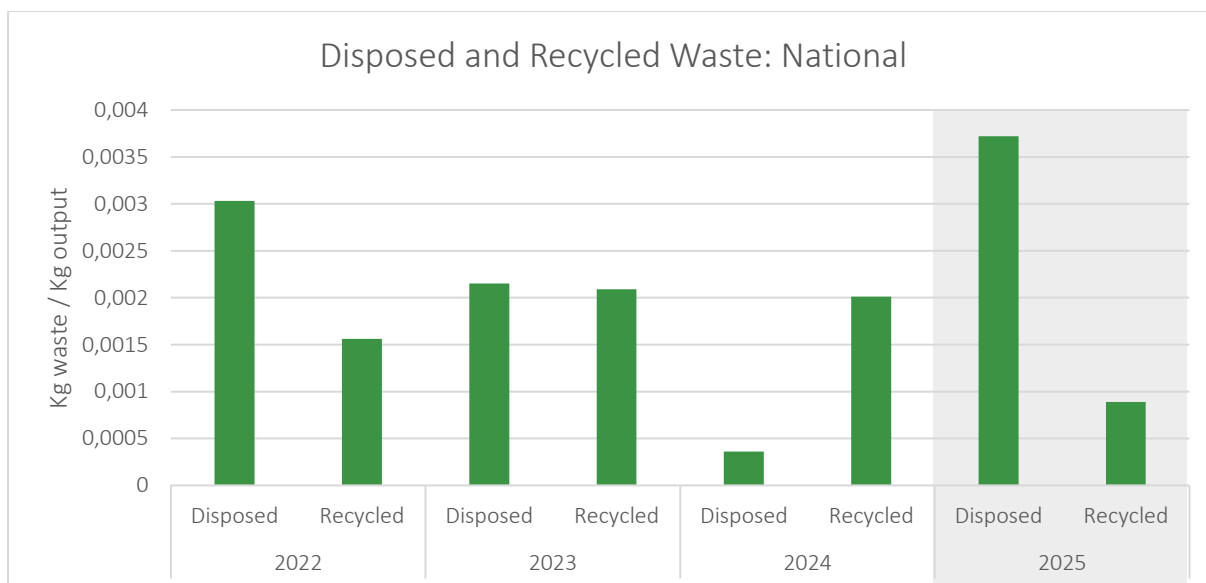


The Western Cape has the richest dataset, allowing for more accurate interpretations of SIZATrack360 data. The graph below depicts a trend in the Western Cape of slightly improved WUE since 2022. The drivers behind this include drought and load shedding considerations and their economic implications for suppliers/packhouses. Overall, Western Cape suppliers WUE has improved from 78,1 L/Kg output in 2021 to approximately 50,47 L/Kg in 2024. This is largely due to increased recording of water usage for a diverse array of crops with diverse irrigation requirements. This is also driven by the fact that the 2022/2023 season experienced above-average rainfall, followed by an El Niño dry season in the 2023/2024 season. The data for the 2025 year is significantly higher due to only a few SIZATrack360 cycles being completed for the 2025 year, which skews the data.

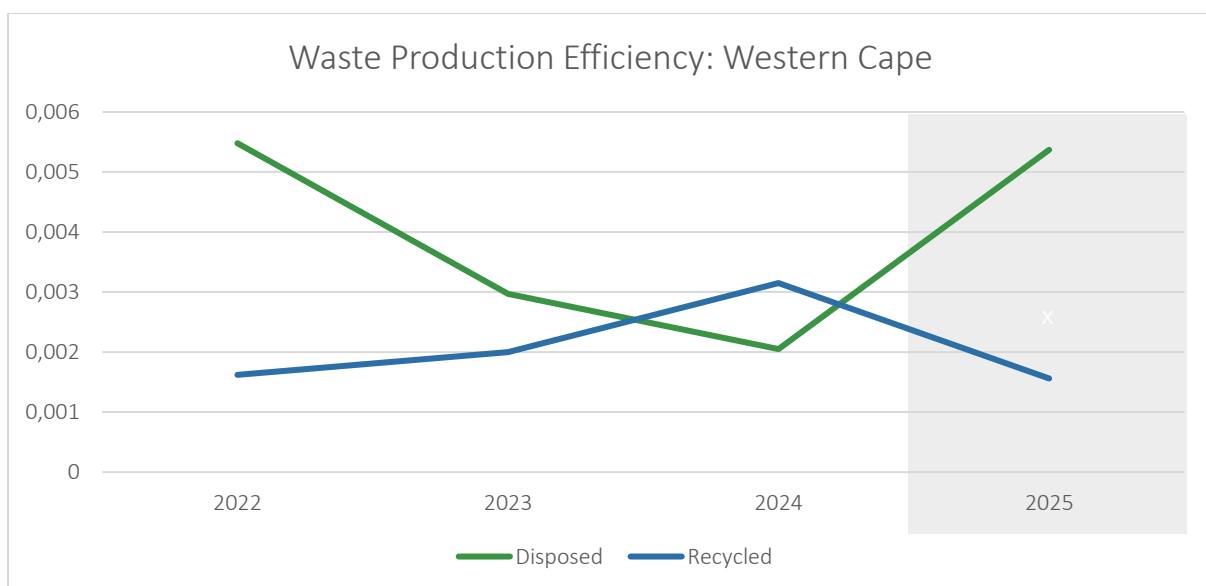


Waste Management

The below graph depicts the efficiency of disposed and recycling of waste production at a national level. This data cannot be disaggregated to the provincial level due to some provinces' lack of recordkeeping on waste streams. This graph suggests that the efficiency of disposed and recycled waste has improved, indicating a shift over time away from the disposal of waste at landfills and an overall reduction in waste generation. In 2022, the average amount of disposed waste per kilogram of output was 0,003 kg of disposed waste/kg output. This value has trended towards zero over time, indicating that either the efficiency of waste production has been increasing, or that data capturing on waste streams has reduced. In 2024, this value improved to 0,00038 kg of disposed waste/kg output. There is an increase in the 2025 year to 0,00372 kg of disposed waste/kg output due to only a small portion of SIZATrack360 cycles being completed, which somewhat skews the 2025 data.



The Western Cape contains sufficient data to conduct a provincial-level analysis. The graph below shows that Western Cape waste production efficiency has generally improved over time. The efficiency of disposed waste per output has improved from roughly 0,0055 kg disposed waste/kg output in 2022 to 0,0021 kg disposed waste/kg output in 2024. The efficiency of recycled waste was initially 0,0016 kg recycled waste/kg output in 2022 and increased to 0,0032 kg recycled waste/kg output in 2024. In 2025, the efficiency of disposed waste worsens while the efficiency of recycled waste improves due to only a few cycles being completed for the 2025 year, which skews the data. Overall, the efficiency of recycled waste was decline since 2021, implying that recycling efforts are increasing. Further, the recycling waste efficiency surpassed disposed waste efficiency in 2024, implying that on average, Western Cape farmers are recycling more waste than disposing.

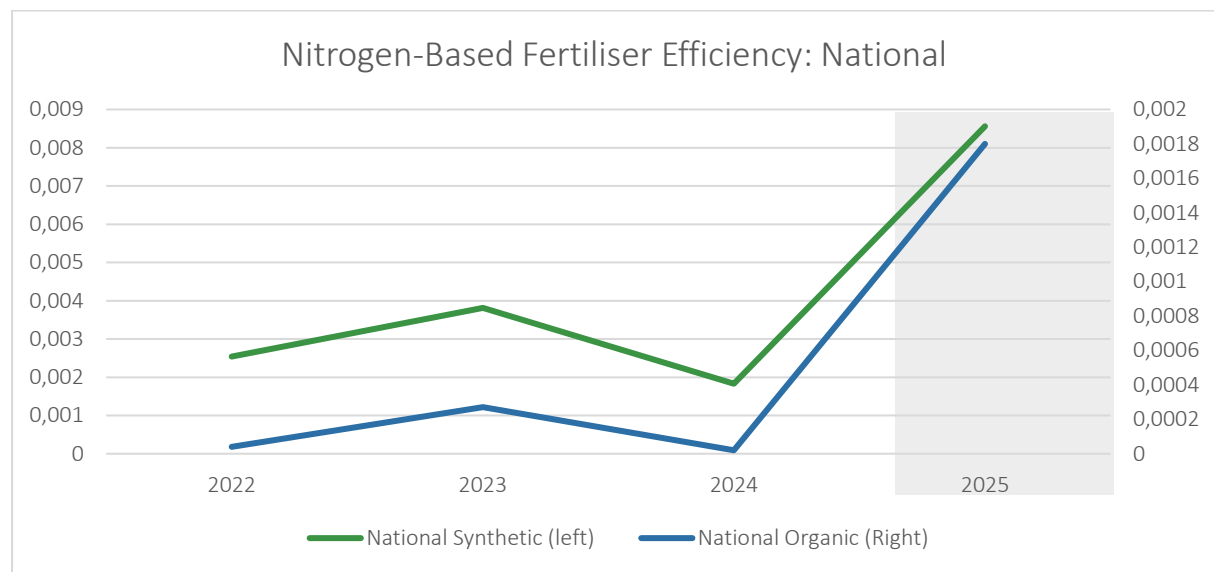


Nitrogen-based Fertiliser Usage

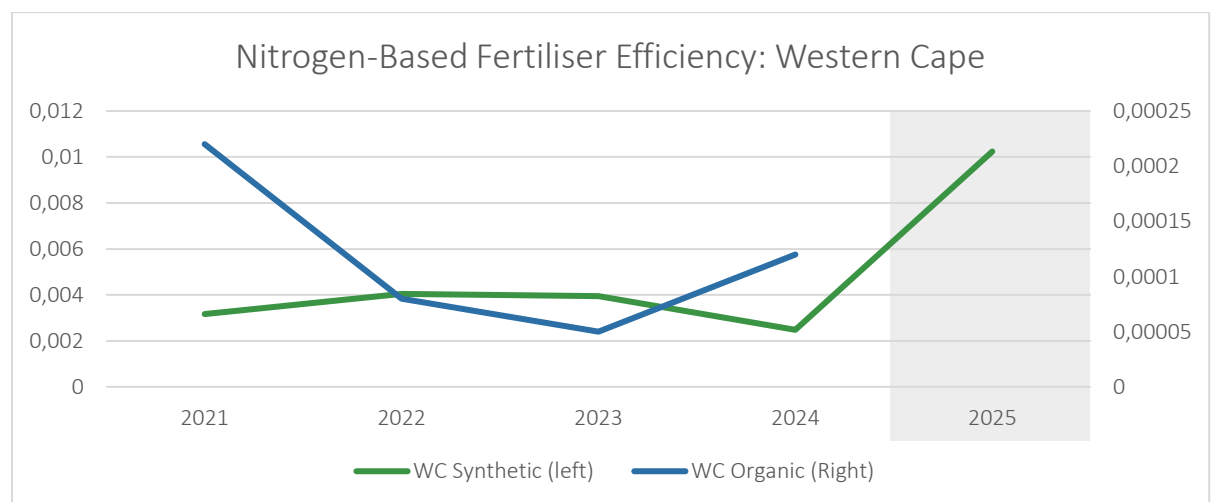
Nitrogen-based fertilisers are considered important as their application may create environmental damage. Organic nitrogen-based fertilisers are generally considered more environmentally friendly and are typically a first step when substituting away from synthetic nitrogen.

The below graph depicts the average efficiency of synthetic and organic nitrogen-based fertilisers at a national level from 2021 to 2025. This graph illustrates that there is a decrease in the efficiency of application of both synthetic nitrogen fertilisers and organic nitrogen-based fertilisers until 2025. This suggests that suppliers are

either applying greater quantities of all nitrogen-based fertilisers, or that the accuracy of data capturing for nitrogen-based fertilisers has improved over time at a national scale.



The graph below depicts nitrogen-fertiliser application for the Western Cape from 2021 to 2025. This graph shows that the efficiency of synthetic nitrogen-based fertilisers has slightly decline over time. The efficiency of organic nitrogen-based fertiliser initially improved from 2021 to 2023 and thereafter worsened slightly between the 2023 and 2024 seasons. No data for organic fertiliser usage in 2025 has been captured yet on the SIZATrack360 platform due to only a few SIZATrack360 cycles being completed for 2025 thus far. Synthetic nitrogen-based fertiliser application has remained somewhat stable until 2024. This suggests that farmers in the Western Cape opted for increased organic nitrogen-based fertilisers in 2024. There is a decline in the efficiency of synthetic N-based fertilisers used in the 2025 year, due to only a handful of cycles being completed for the 2025 year thus far, none of which recorded organic nitrogen-based fertiliser application. The 2025 data will reflect more accurately with time once more data capturing cycles have been completed.



3. SIZA CAPACITY BUILDING INITIATIVES

As part of its support programme, SIZA offers a range of in-person and virtual training initiatives, along with practical resources such as videos, posters, legal guides, and templates—all designed to help subscribers navigate their compliance journey, prepare for third-party audits, and deepen their understanding of legislative requirements and compliance practices.

Subscriber training:

- Social and Environmental Compliance
- Working Hours and Wages training
- Environmental Legislation
- Social and Environmental Self-Assessment Questionnaire (SAQ) Training
- SIZA/LEAF Marque Producer Session
- When Grievance becomes a Good Practice
- Worker voice Webinars
- Understanding Audit Findings
- SIZATrack360 Digital Recordkeeping
- MySIZA Platform navigation
- Audit Process and Methodology

In the most recent quarter, a total of 10 training sessions were conducted, including no combined in-person social and environmental compliance training sessions and 10 webinar training sessions attended by 319 individuals, implying an average attendance of 31 attendees per training session.

In the 2025/2026 financial year, a total of 2 593 individuals attended trainings hosted by SIZA. This represents a % increase from number of attendees during the 2024/2025 financial year (1 826 individuals).

