SIZA MONITORING & EVALUATION REPORT

ON

SOCIAL AND ENVIRONMENTAL PRACTICES

Quarterly Update for Q1 2025/2026

1 April 2025 – 30 June 2025

In cooperation with the Western Cape Department of Agriculture

CONTENTS

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. This tool 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 with 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 then 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 both 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 a “site” refers to an agricultural production or processing facility, characterised by permanent infrastructure supporting production and/or packing activities; ongoing activities warranting a permanent workforce; and clear indication, either independently or within a group, as a distinct production unit with its management structure.

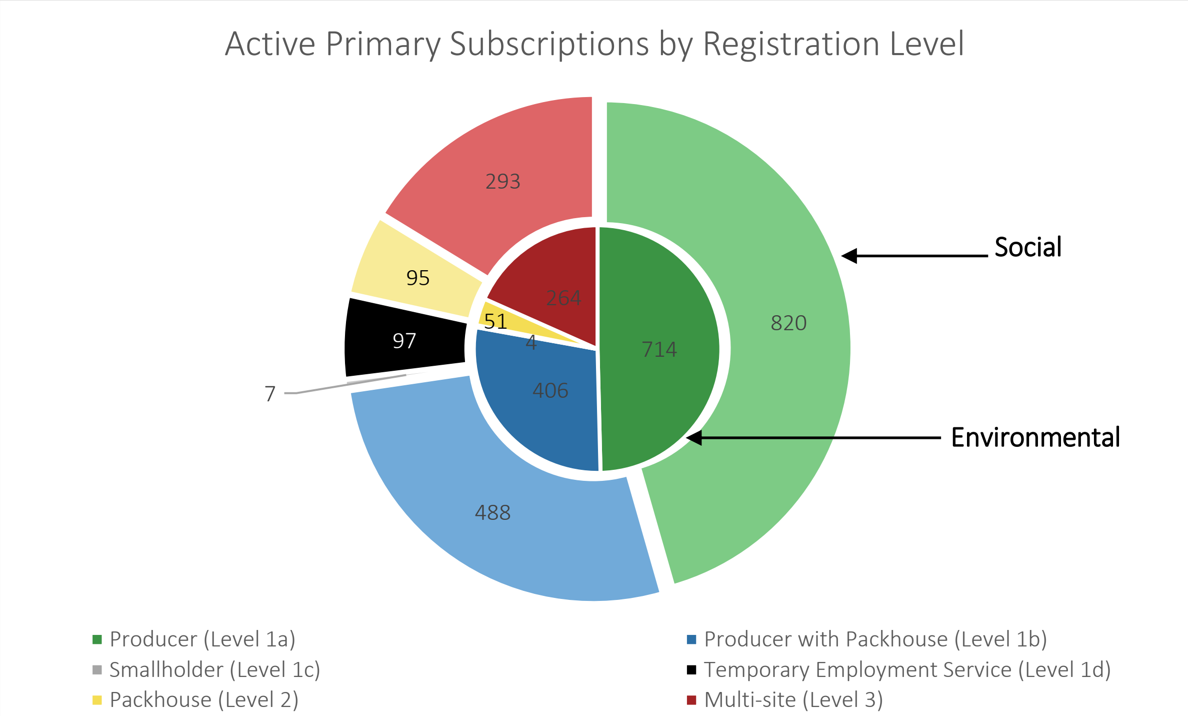
It has become a trend over the last few years that smaller farms are being sold to bigger groups into multisites. Therefore, although the number of subscribers has somewhat declined, the total hectarage remains the same or even shows growth.

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.

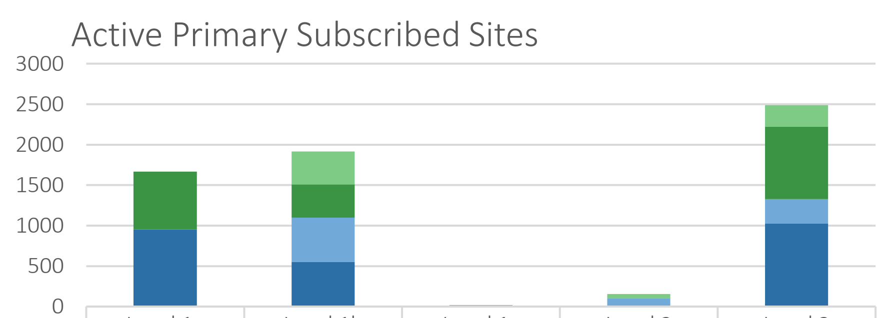
During Q1 of the 2025/2026 year, the number of social subscribers declined by 70, due to the amalgamation of single sites into multisites, while environmental subscribers increased by 11. SIZATrack360 subscriptions remained unchanged over the past quarter at a total of 380 subscribed users.

Active Primary Subscriptions

For both Social and Environmental subscriptions, Level 1a suppliers represent the largest share of active primary subscriptions—45.56% and 49.62% respectively—followed by Level 1b suppliers at 27.11% (Social) and 28.21% (Environmental), and multisite operations at 16.28% (Social) and 18.35% (Environmental).



A total of 3,509 sites are registered under the Social module, comprising 2,541 production sites and 952 packing sites. The majority fall under Level 3 (1,342 sites—1,028 production and 298 packing) and Level 1b (1,100 sites—550 production and 550 packing). Similarly, 2,755 sites are registered under the Environmental module, including 2,026 production and 722 packing sites, with most falling under Level 3 (1,168 sites—898 production and 263 packing) and Level 1b (816 sites—408 production and 408 packing).



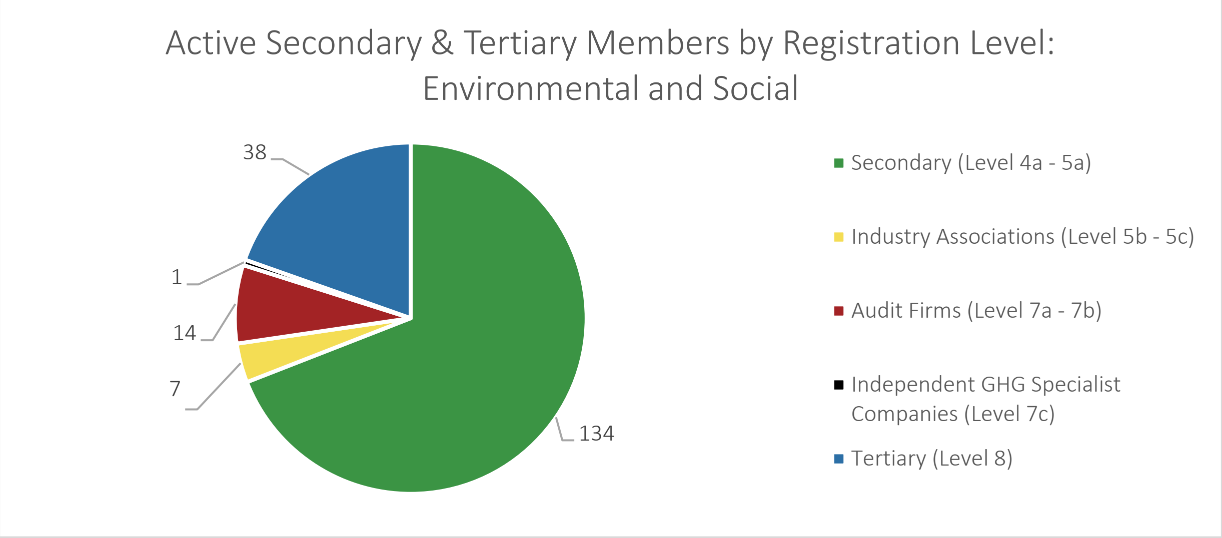
	Level 1a	Level 1b	Level 1c	Level 2	Level 3
Environmental sites Packing	0	408	0	51	263
Environmental sites Production	716	408	4	0	898
Social sites Packing	0	550	0	104	298
Social sites Production	951	550	12	0	1028

Active Secondary and Tertiary Subscriptions

The MySIZA platform serves as a risk management tool 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.

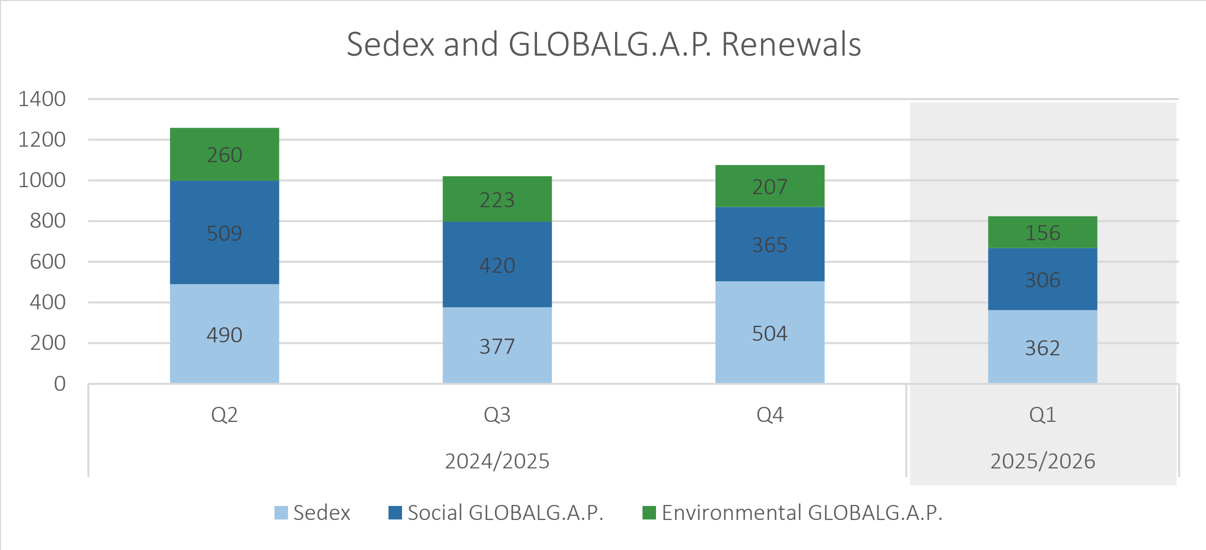
Currently, 141 secondary (including exporters, importers, retailers, and industry associations) and 53 tertiary subscribers (including audit firms, consultants, and remedy providers) are registered on the MySIZA platform.

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 are calculated, this adds up to 24 553 links between SIZA suppliers and direct and indirect buyers globally.



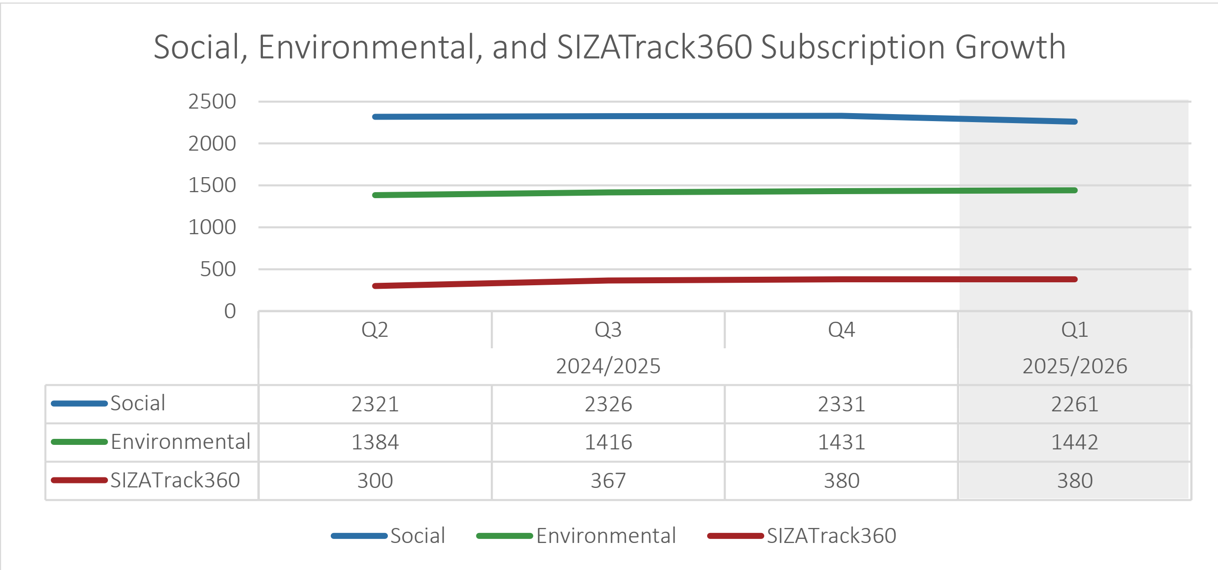
Sedex and GlobalG.A.P. Registrations

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, 362 Sedex, 306 Social GLOBALG.A.P., and 156 Environmental GLOBALG.A.P. subscribers renewed their visibility—commodity seasonality, subscription patterns, and the consolidation of sites influence fluctuations in these numbers.

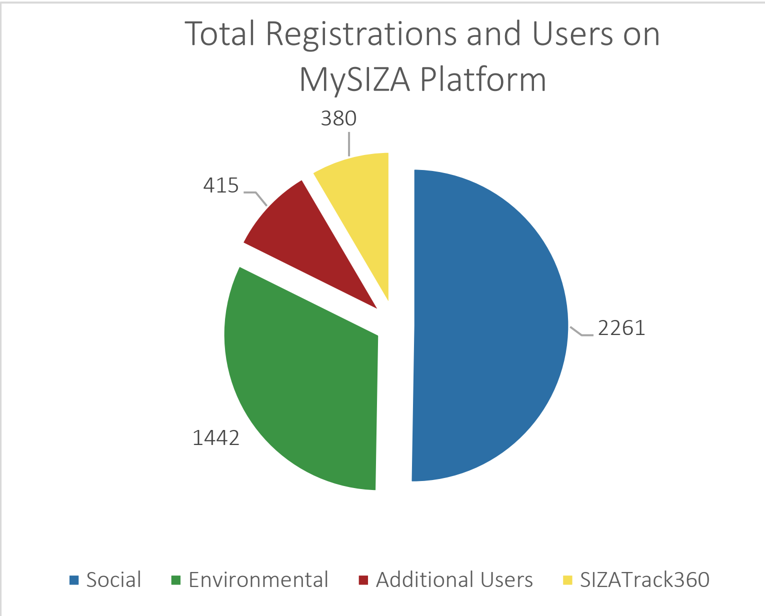


<u>Total *MySIZA* Registrations and Users</u>

Currently, there are a total of 4 498 subscriptions on the MySIZA platform, comprising 2 547 production sites and 954 packing sites. This includes a total of 2 261 subscribers who are registered for the SIZA Social module, of which, 821 are registered for the Social module only and the remaining 1 440 are registered for both the Social and Environmental modules. This covers a total of 3 509 sites subscribed under the SIZA Social module, of which 2 541 are production sites and 952 are packing sites. A total of 1 442 subscribers are registered for the Environmental module, of which six are registered only for the Environmental module, and the remaining 1 436 are registered for both the Environmental and Social modules. This covers a total of 2 755 sites registered under the SIZA Environmental module, of which 2 026 are production sites and 722 are packing sites. A further 380 subscribers, comprising over 870 sites, have also registered for the SIZATrack360 digital recordkeeping programme.



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 110 audit personnel, 141 secondary subscribers (such as exporters, importers, and retailers), 53 tertiary subscribers (including consultants and remedy solution providers), six environmental verification users, three GHG specialist users, and 102 secondary contacts (additional compliance personnel linked to primary profiles). These categories contribute a further 415 active users to the MySIZA platform.



= **4 498** total registrations

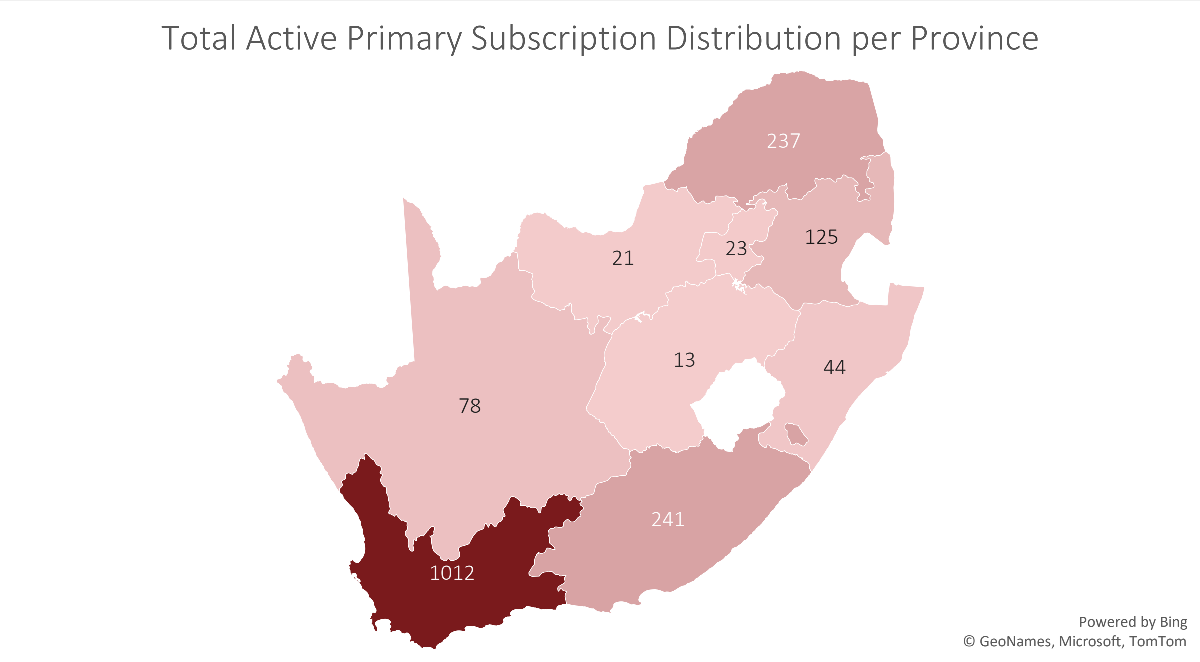
One user can be linked to both the Social and Environmental modules and Digital Recordkeeping. Therefore, to calculate the total module registrations and users, the 415 additional user profiles should be added to the total module registration subscriptions, including 2 261 Social registrations, 1 442 Environmental registrations, and 380 Digital Recordkeeping registrations. This brings the total registrations in terms of subscriptions to **4 498 users.**

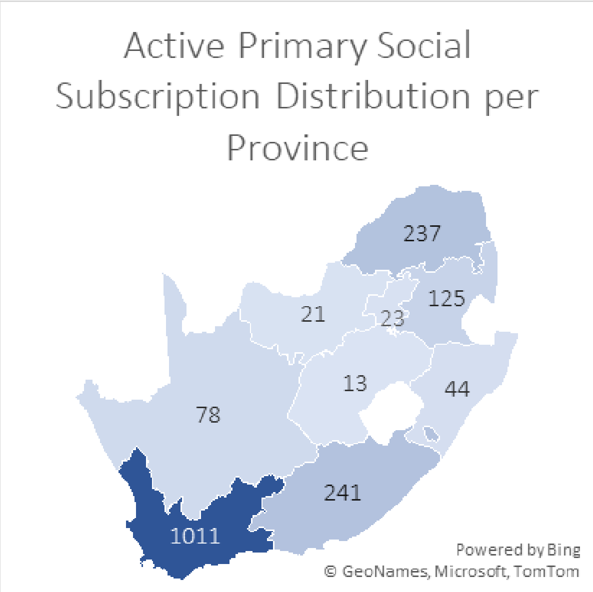
1.2 Distribution and Trends

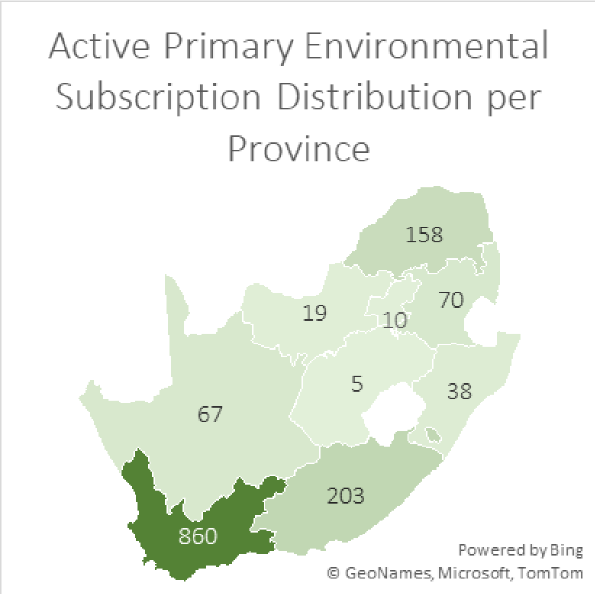
Distribution of Active Primary Subscriptions

Of a total of 3 501 sites registered under either the Social or Environmental module, 3 273 have sites allocated within South Africa as illustrated on the distribution map below. With the Western Cape being known for providing production stability within the agricultural sector and being one of South Africa's most important provinces for agricultural exports, the Western Cape records the highest total SIZA subscriptions across the nine provinces.

Currently the Western Cape is home to 1 012 Primary subscription profiles (1 011 of which are subscribed for the Social module, 860 of which are subscribed for the Environmental module), followed by the Eastern Cape (241 total subscriptions; all of which are subscribed to the Social module, and 203 of which are subscribed to the Environmental module) and Limpopo (237 total subscriptions; all of which are subscribed to the Social module, and 158 of which are subscribed to the Environmental module).

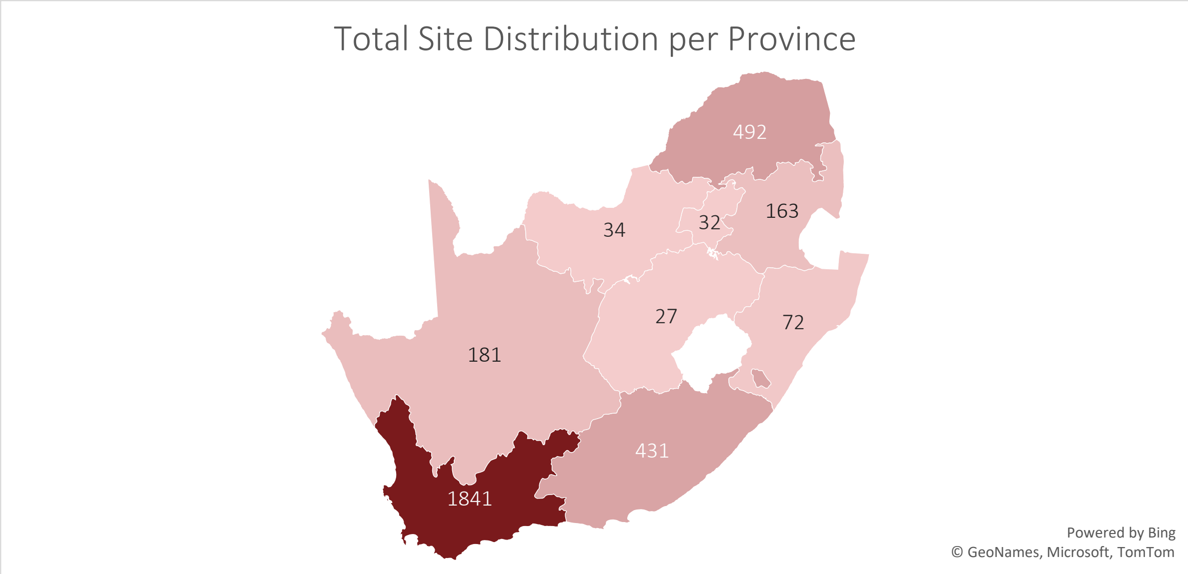


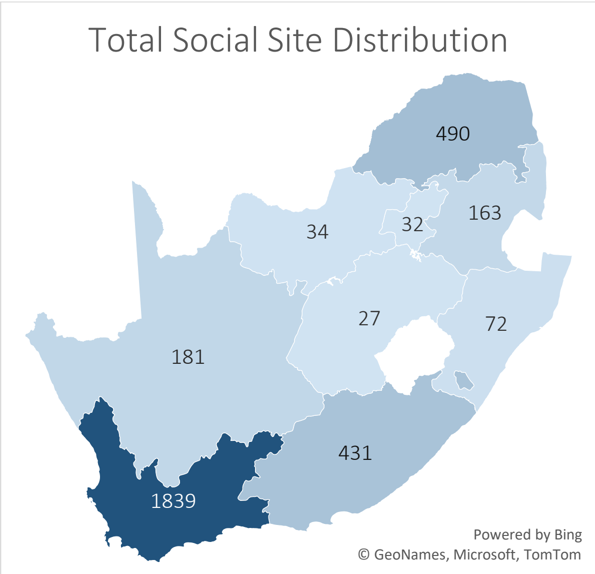


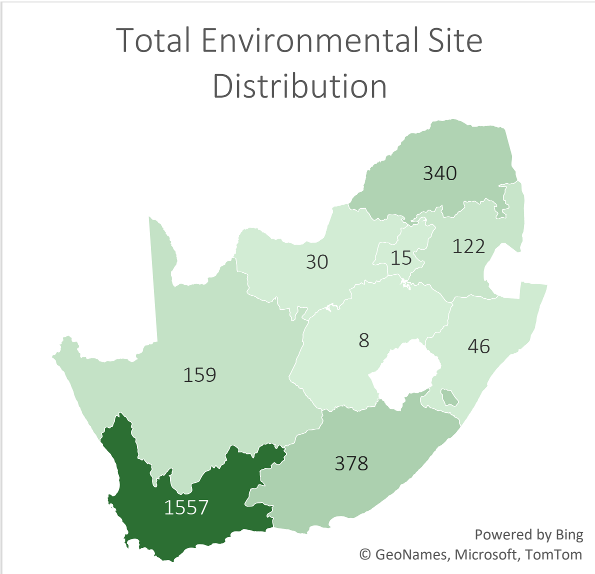


<u>Distribution of Active Primary Sites</u>

The graph below depicts the distribution of primary production sites containing production and packing sites (levels 1a – 3, not including Temporary Employment Services) per province for Q1 2025/2026. The Western Cape contains the largest number of sites (1 841), followed by Limpopo (492) and the Eastern Cape (431). The distribution of sites registered under the SIZA Social module largely follows the same trend, with the Western Cape accounting for the largest amount of sites (1 839), followed by Limpopo (490), and the Eastern Cape (431). In terms of sites registered under the SIZA Environmental module, the Western Cape again accounts for the largest number of sites (1 557), followed by the Eastern Cape (378), and Limpopo (340). 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.





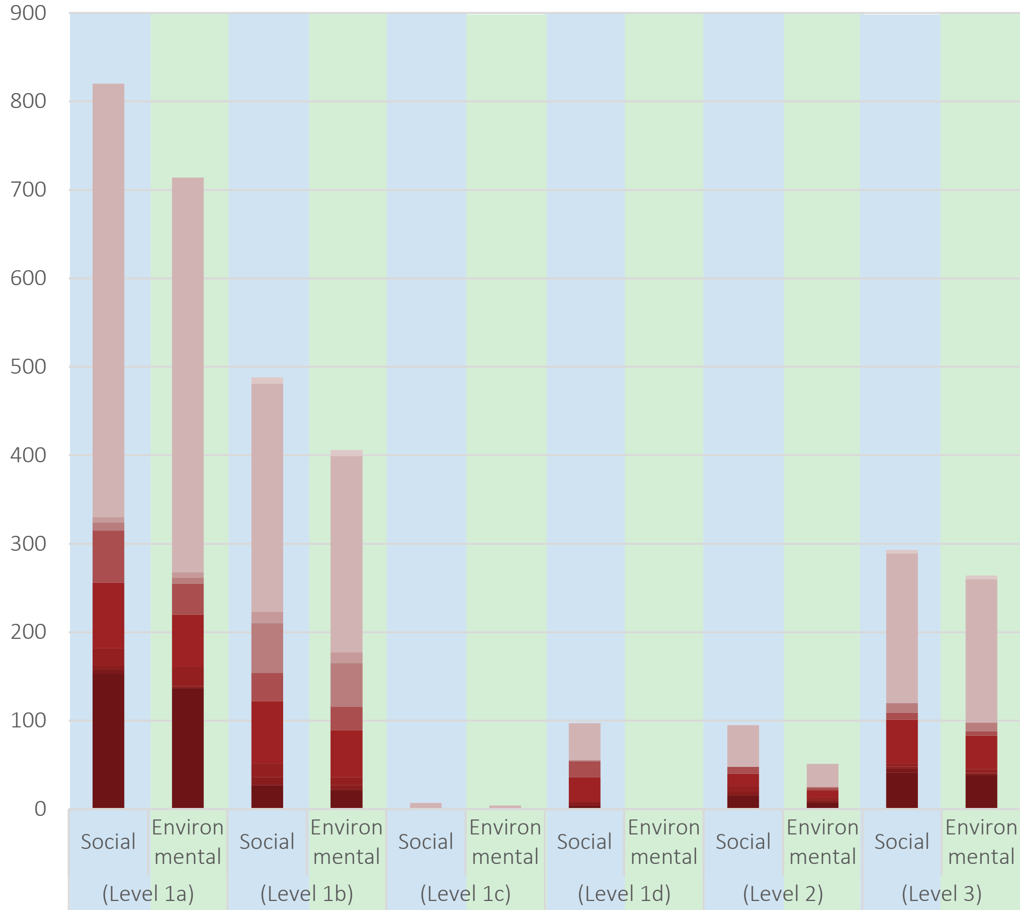


Active Primary Subscriptions by levels

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 59.75% of all such subscriptions, contributing to the province's total of 1,011 primary registrations.

Nationally, Level 1a makes up 45.56% of all Social primary subscriptions. Similarly, Level 1a subscribers in the Western Cape comprise 62.46% of Environmental primary subscriptions for the Environmental module, with 860 registered in the province. At the national level, Level 1a also leads Environmental subscriptions, representing 49.61% of the total.

Active Primary subscriptions per Province by Registration Level



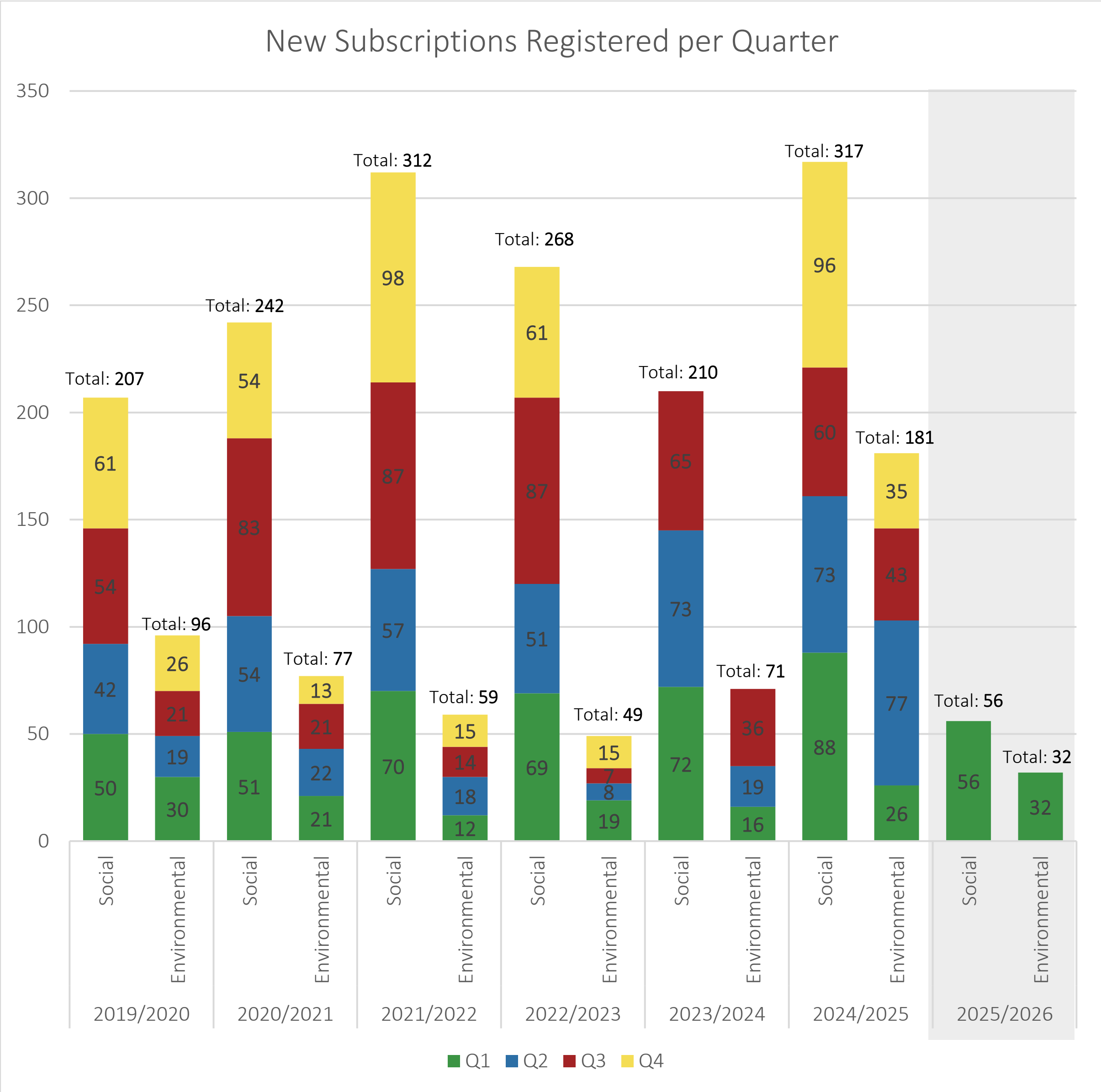
	Social (Level 1a)	Environmental (Level 1a)	Social (Level 1b)	Environmental (Level 1b)	Social (Level 1c)	Environmental (Level 1c)	Social (Level 1d)	Environmental (Level 1d)	Social (Level 2)	Environmental (Level 2)	Social (Level 3)	Environmental (Level 3)
Unknown	0	0	7	7	0	0	0	0	0	0	4	4
Western Cape	490	446	258	222	6	4	41	0	47	26	169	162
North West	6	6	13	12	0	0	1	0	0	0	0	0
Northern Cape	9	7	56	49	0	0	1	0	0	1	11	10
Mpumalanga	59	35	32	27	0	0	18	0	8	3	8	5
Limpopo	74	59	71	53	0	0	28	0	14	8	50	38
KwaZulu-Natal	20	22	15	9	0	0	0	0	6	3	3	4
Gauteng	4	2	9	5	0	0	4	0	4	2	2	1
Free State	5	0	0	1	0	0	0	0	1	1	5	2
Eastern Cape	153	137	27	21	1	0	4	0	15	7	41	38

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, a total of 2,123 new primary subscribers have registered for the SIZA Social module, including 56 new registrations during the current reporting quarter. For the SIZA Environmental module, 565 new primary subscribers have registered since 2019, with 32 added this quarter. The steady 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.



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. As the table below outlines, the various commodities have been categorised with the total number of sites for each commodity type. Here, it is important to note that there can be more than one commodity per site, and thus some sites are represented multiple times.

The four most prevalent commodities by sites nationally are Citrus (2 679 sites registered for SIZA Social, 2 235 sites registered for SIZA Environmental), Stone fruit (1 209 sites registered for SIZA Social, 1 041 sites registered for SIZA Environmental), Pome Fruit (957 sites registered for SIZA Social, 852 sites registered for SIZA Environmental), and Table Grapes (462 sites registered for SIZA Social, 377 sites registered for SIZA Environmental). In the Western Cape, the most prevalent commodities per by sites are Stone fruit (1141 sites registered for SIZA Social, 998 sites registered for SIZA Environmental) Citrus (892 sites registered for SIZA Social, 806 sites registered for SIZA Environmental), Pome fruit (857 sites registered for SIZA Social, 776 sites registered for SIZA Environmental), and Wine Grapes (447 sites registered for SIZA Social, 358 sites registered for SIZA Environmental):

	Social				Environmental			
	All South Africa:		Western Cape:		All South Africa:		Western Cape:	
Commodity	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites
Kumquats	2	0,03%	0	0,00%	1	0,02%	0	0,00%
Limes	37	0,48%	23	0,51%	34	0,54%	21	0,54%
Lemons	773	10,11%	252	5,63%	637	10,03%	226	5,86%
Pomelo	205	2,68%	16	0,36%	160	2,52%	16	0,41%
Grapefruit	100	1,31%	8	0,18%	84	1,32%	8	0,21%
Soft citrus	875	11,45%	385	8,60%	746	11,75%	344	8,92%
Oranges	644	8,43%	184	4,11%	532	8,38%	168	4,36%
Other Citrus	43	0,56%	24	0,54%	41	0,65%	23	0,60%
Total Citrus	**2679**	**35,05%**	**892**	**19,93%**	**2235**	**35,20%**	**806**	**20,90%**
Apricots	185	2,42%	181	4,04%	153	2,41%	152	3,94%
Cherries	67	0,88%	41	0,92%	51	0,80%	39	1,01%
Nectacots	3	0,04%	2	0,04%	2	0,03%	2	0,05%
Nectarines	267	3,49%	251	5,61%	244	3,84%	230	5,96%
Peaches	325	4,25%	321	7,17%	284	4,47%	283	7,34%
Plums	351	4,59%	335	7,49%	299	4,71%	285	7,39%
Pluots	1	0,01%	1	0,02%	1	0,02%	1	0,03%
Prunes	10	0,13%	9	0,20%	7	0,11%	6	0,16%
Total Stone Fruit	**1209**	**15,82%**	**1141**	**25,50%**	**1041**	**16,39%**	**998**	**25,88%**
Apples	431	5,64%	375	8,38%	391	6,16%	350	9,07%
Pears	524	6,86%	480	10,73%	461	7,26%	426	11,04%
Quince	1	0,01%	1	0,02%	0	0,00%	0	0,00%
Other Pome Fruit	1	0,01%	1	0,02%	0	0,00%	0	0,00%
Total Pome Fruit	**957**	**12,52%**	**857**	**19,15%**	**852**	**13,42%**	**776**	**20,12%**
Total Table Grapes	**462**	**6,04%**	**332**	**7,42%**	**377**	**5,94%**	**273**	**7,08%**

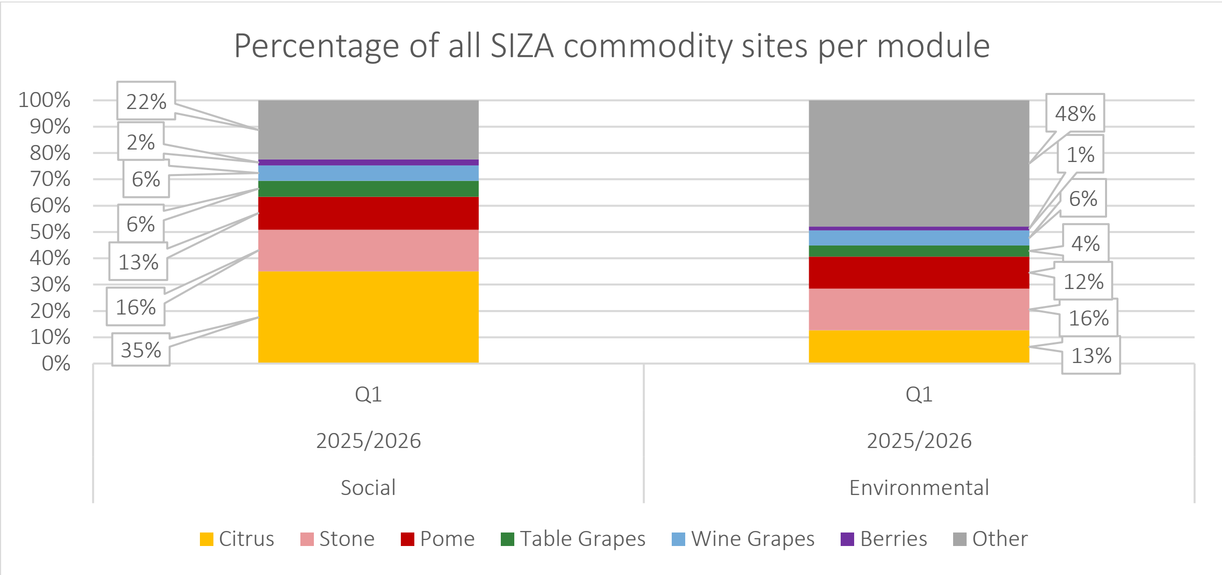
	Social				Environmental			
	All South Africa:		Western Cape:		All South Africa:		Western Cape:	
Commodity	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites
Distilled Spirits	2	0,03%	2	0,04%	2	0,03%	2	0,05%
Processed Grape (Wine)	1	0,01%	1	0,02%	1	0,02%	1	0,03%
Wine Grapes	233	3,05%	230	5,14%	182	2,87%	180	4,67%
Wine grapes (Red)	104	1,36%	104	2,32%	85	1,34%	85	2,20%
Wine Grapes (White)	110	1,44%	110	2,46%	90	1,42%	90	2,33%
Total Wine Grapes	**450**	**5,89%**	**447**	**9,99%**	**360**	**5,67%**	**358**	**9,28%**
Asparagus	2	0,03%	0	0,00%	0	0,00%	0	0,00%
Beetroot	11	0,14%	9	0,20%	8	0,13%	7	0,18%
Broad Beans	2	0,03%	2	0,04%	0	0,00%	0	0,00%
Broccoli	20	0,26%	13	0,29%	15	0,24%	10	0,26%
Brussel Sprouts	1	0,01%	1	0,02%	0	0,00%	0	0,00%
Butternuts	77	1,01%	59	1,32%	58	0,91%	45	1,17%
Cabbage	21	0,27%	4	0,09%	14	0,22%	2	0,05%
Carrots	14	0,18%	7	0,16%	8	0,13%	6	0,16%
Cauliflower	12	0,16%	9	0,20%	8	0,13%	7	0,18%
Celery	4	0,05%	2	0,04%	1	0,02%	0	0,00%
Cucumber	8	0,10%	0	0,00%	4	0,06%	0	0,00%
Garlic	4	0,05%	1	0,02%	2	0,03%	1	0,03%
Green Beans	22	0,29%	2	0,04%	17	0,27%	1	0,03%
Kale	1	0,01%	1	0,02%	1	0,02%	1	0,03%
Lettuce	6	0,08%	2	0,04%	2	0,03%	0	0,00%
Onion	67	0,88%	52	1,16%	62	0,98%	51	1,32%
Other Marrows	10	0,13%	3	0,07%	8	0,13%	3	0,08%
Patty Pans	4	0,05%	1	0,02%	1	0,02%	1	0,03%
Peas	2	0,03%	0	0,00%	0	0,00%	0	0,00%
Potato	35	0,46%	26	0,58%	29	0,46%	25	0,65%
Pumpkin	57	0,75%	28	0,63%	48	0,76%	25	0,65%
Spinach & Chard	11	0,14%	9	0,20%	6	0,09%	6	0,16%
Spring Onion	3	0,04%	1	0,02%	2	0,03%	1	0,03%
Sweet Potato	25	0,33%	21	0,47%	21	0,33%	20	0,52%
Tomatoes	53	0,69%	32	0,72%	34	0,54%	26	0,67%
Zucchini/Baby Marrow	15	0,20%	4	0,09%	9	0,14%	3	0,08%
Other Vegetables	37	0,48%	16	0,36%	20	0,31%	9	0,23%
Total Fresh Vegetables	**524**	**6,86%**	**305**	**6,82%**	**378**	**5,95%**	**250**	**6,48%**
Avocados	256	3,35%	25	0,56%	217	3,42%	20	0,52%
Bananas	31	0,41%	1	0,02%	24	0,38%	1	0,03%
Litchis	47	0,61%	0	0,00%	44	0,69%	0	0,00%
Mangoes	71	0,93%	2	0,04%	61	0,96%	1	0,03%
Papaya	5	0,07%	0	0,00%	5	0,08%	0	0,00%
Pineapple	1	0,01%	0	0,00%	0	0,00%	0	0,00%
Other Subtropical Fruit	21	0,27%	4	0,09%	17	0,27%	1	0,03%
Total Subtropical Fruit	**432**	**5,65%**	**32**	**0,72%**	**368**	**5,80%**	**23**	**0,60%**

	Social				Environmental			
	All South Africa:		Western Cape:		All South Africa:		Western Cape:	
Commodity	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites
Blackberries	3	0,04%	1	0,02%	2	0,03%	1	0,03%
Blueberries (potted)	64	0,84%	38	0,85%	58	0,91%	35	0,91%
Blueberries (soil)	64	0,84%	40	0,89%	60	0,94%	37	0,96%
Gooseberries	2	0,03%	2	0,04%	2	0,03%	2	0,05%
Raspberries	5	0,07%	3	0,07%	5	0,08%	3	0,08%
Strawberries	18	0,24%	14	0,31%	10	0,16%	8	0,21%
Other Berries	13	0,17%	10	0,22%	7	0,11%	7	0,18%
Total Berries	**169**	**2,21%**	**108**	**2,41%**	**144**	**2,27%**	**93**	**2,41%**
Almonds	16	0,21%	16	0,36%	12	0,19%	12	0,31%
Macadamia Nuts	150	1,96%	6	0,13%	118	1,86%	2	0,05%
Pecan Nuts	16	0,21%	5	0,11%	11	0,17%	4	0,10%
Other Nuts & Seeds	8	0,10%	3	0,07%	1	0,02%	0	0,00%
Total Nuts & Seeds	**190**	**2,49%**	**30**	**0,67%**	**142**	**2,24%**	**18**	**0,47%**
Fynbos & Proteas	35	0,46%	32	0,72%	27	0,43%	25	0,65%
Other Flowers and Ornamentals	18	0,24%	12	0,27%	15	0,24%	10	0,26%
Total Flowers & Ornamentals	**53**	**0,69%**	**44**	**0,98%**	**42**	**0,66%**	**35**	**0,91%**
Maize	25	0,33%	0	0,00%	22	0,35%	0	0,00%
Soybeans	2	0,03%	0	0,00%	1	0,02%	0	0,00%
Wheat	6	0,08%	3	0,07%	3	0,05%	1	0,03%
Other Grains	7	0,09%	5	0,11%	7	0,11%	5	0,13%
Total Grains Sites	**40**	**0,52%**	**8**	**0,18%**	**33**	**0,52%**	**6**	**0,16%**
Dried Fruit	8	0,10%	5	0,11%	8	0,13%	5	0,13%
Raisins	29	0,38%	4	0,09%	29	0,46%	4	0,10%
Total Dried Fruit & Dried Vegetables	**37**	**0,48%**	**9**	**0,20%**	**37**	**0,58%**	**9**	**0,23%**
Bell Peppers	20	0,26%	3	0,07%	15	0,24%	0	0,00%
Chillies	9	0,12%	0	0,00%	6	0,09%	0	0,00%
Pequin Peppers	1	0,01%	0	0,00%	1	0,02%	0	0,00%
Other Peppers	4	0,05%	0	0,00%	1	0,02%	0	0,00%
Total Capsicum	**34**	**0,44%**	**3**	**0,07%**	**23**	**0,36%**	**0**	**0,00%**
Canned Apricots	5	0,07%	5	0,11%	5	0,08%	5	0,13%
Canned Peaches	11	0,14%	11	0,25%	8	0,13%	8	0,21%
Canned Pears	1	0,01%	1	0,02%	0	0,00%	0	0,00%
Total Canning Fruit	**17**	**0,22%**	**17**	**0,38%**	**13**	**0,20%**	**13**	**0,34%**
Meat	8	0,10%	6	0,13%	6	0,09%	5	0,13%
Poultry	1	0,01%	1	0,02%	1	0,02%	1	0,03%
Wool/Mohair	4	0,05%	4	0,09%	3	0,05%	3	0,08%
Dairy Products	3	0,04%	3	0,07%	2	0,03%	2	0,05%
Other Livestock/Animal Products	1	0,01%	1	0,02%	1	0,02%	1	0,03%
Total Livestock & Animals	**17**	**0,22%**	**15**	**0,34%**	**13**	**0,20%**	**12**	**0,31%**

	Social				Environmental			
	All South Africa:		Western Cape:		All South Africa:		Western Cape:	
Commodity	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites	Sites	% of total sites
Essential Oils	1	0,01%	1	0,02%	1	0,02%	1	0,03%
Olive Oil	3	0,04%	3	0,07%	3	0,05%	3	0,08%
Sugar	4	0,05%	0	0,00%	4	0,06%	0	0,00%
Sugar Cane	9	0,12%	0	0,00%	8	0,13%	0	0,00%
Total Sugar & Oils	**17**	**0,22%**	**4**	**0,09%**	**16**	**0,25%**	**4**	**0,10%**
Fresh Herbs	6	0,08%	2	0,04%	2	0,03%	1	0,03%
Preservatives	4	0,05%	0	0,00%	4	0,06%	0	0,00%
Total Seasoning & Preservatives	**10**	**0,13%**	**2**	**0,04%**	**6**	**0,09%**	**1**	**0,03%**
Orange Juice	1	0,01%	0	0,00%	0	0,00%	0	0,00%
Other Juices	1	0,01%	0	0,00%	1	0,02%	0	0,00%
Total Juice	**2**	**0,03%**	**0**	**0,00%**	**1**	**0,02%**	**0**	**0,00%**
Cotton	2	0,03%	0	0,00%	1	0,02%	0	0,00%
Dates	11	0,14%	0	0,00%	9	0,14%	0	0,00%
Dragon Fruit	8	0,10%	2	0,04%	4	0,06%	1	0,03%
Figs	34	0,44%	27	0,60%	28	0,44%	21	0,54%
Granadillas	7	0,09%	4	0,09%	5	0,08%	3	0,08%
Guavas	18	0,24%	10	0,22%	15	0,24%	8	0,21%
Kiwis	53	0,69%	23	0,51%	41	0,65%	17	0,44%
Melon	13	0,17%	4	0,09%	13	0,20%	4	0,10%
Olives	24	0,31%	24	0,54%	23	0,36%	23	0,60%
Persimmons	13	0,17%	13	0,29%	13	0,20%	13	0,34%
Pomegranates	52	0,68%	47	1,05%	38	0,60%	35	0,91%
Tea & Beverages	32	0,42%	31	0,69%	28	0,44%	28	0,73%
Watermelon	26	0,34%	13	0,29%	22	0,35%	10	0,26%
Other Products not listed above	51	0,67%	31	0,69%	29	0,46%	19	0,49%
Total Other Products	**344**	**4,50%**	**229**	**5,12%**	**269**	**4,24%**	**182**	**4,72%**
Total Sites	**7643**	**100,00%**	**4475**	**100,00 %**	**6350**	**100,00%**	**3857**	**100,00%**

Commodity Statistics: General

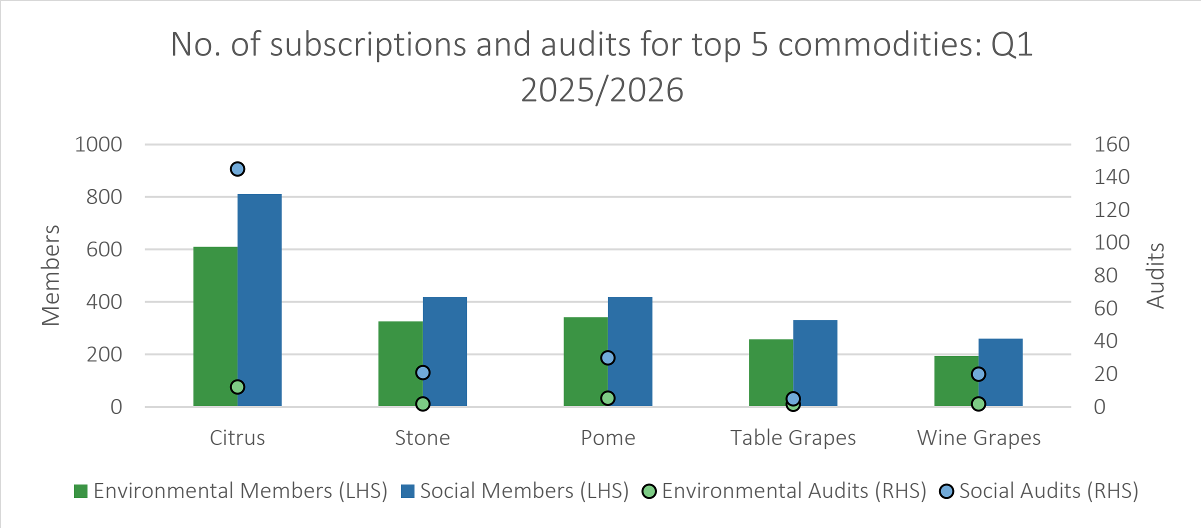
Looking at sites (not hectares) below is a representation of the five commodities with the largest representation among SIZA subscriptions: Citrus, Stone Fruit, Pome Fruit, Table Grapes, and Wine Grapes. Notably, wine grapes inclusion here is driven by the fact that many farms contain diverse commodities, 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 sites is represented in the SIZA subscription base. In terms of subscribed sites in Q1 of 2025/2026, Citrus accounts for 35% of all registered Social sites and 13% of all registered Environmental sites, followed by Stone Fruit (16% of Social sites; 16% of all Environmental sites), Pome Fruit (13% of Social sites; 12% of Environmental sites), Table Grapes (6% of Social sites; 4% of Environmental sites), Wine Grapes (6% of Social sites; 6% of Environmental sites), and Berries (2% of Social sites; 1% 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 Q1 of 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 (811) and Environmental (610) subscribers, followed by Pome fruit (419 Social and 342 Environmental subscribers), Stone Fruit (419 Social and 326 Environmental subscribers), Table Grapes (331 Social and 258 Environmental subscribers), and Wine Grapes (260 Social and 195 Environmental subscribers). Similarly, Citrus accounted for the greatest number of audits in Q1 of 2025/2026 (145 Social and 76 Environmental audits), followed by Pome Fruit (30 Social and 34 Environmental audits), Stone Fruit (21 Social and 12 Environmental audits), Table Grapes (5 Social and 10 Environmental audits), and Wine Grapes (20 Social and 11 Environmental audits).

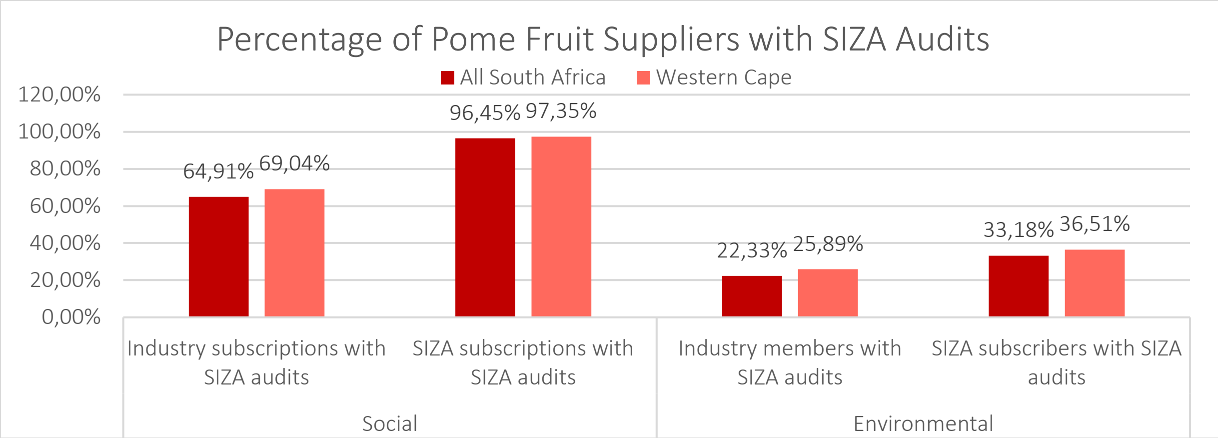


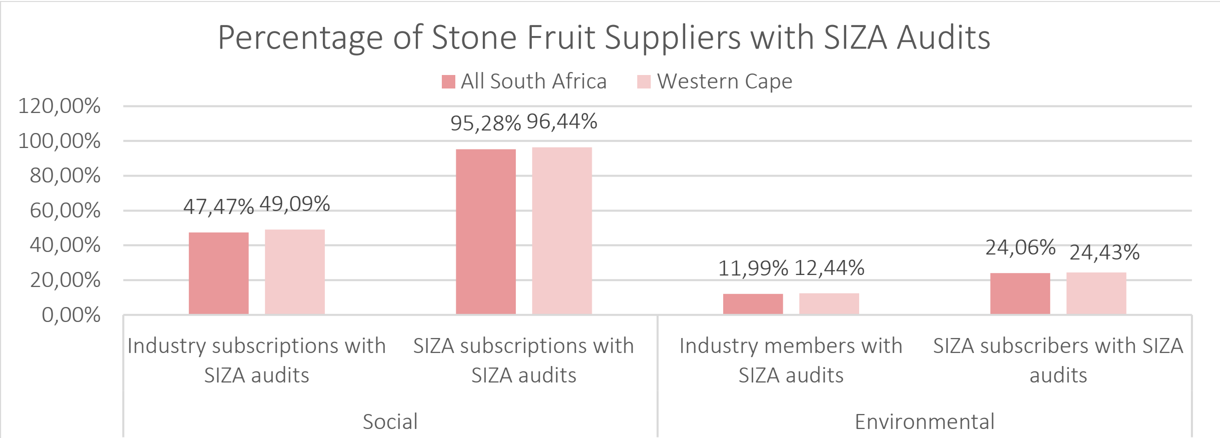
SIZA Environmental subscriptions are currently dominated by five fruit industries – the Citrus, Stone fruit, Pome fruit, Table Grape, and Wine Grape industries. The Citrus, Stone fruit, Pome fruit, and Table Grape industries were key to the initial founding of SIZA, which can be seen in their significant 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.

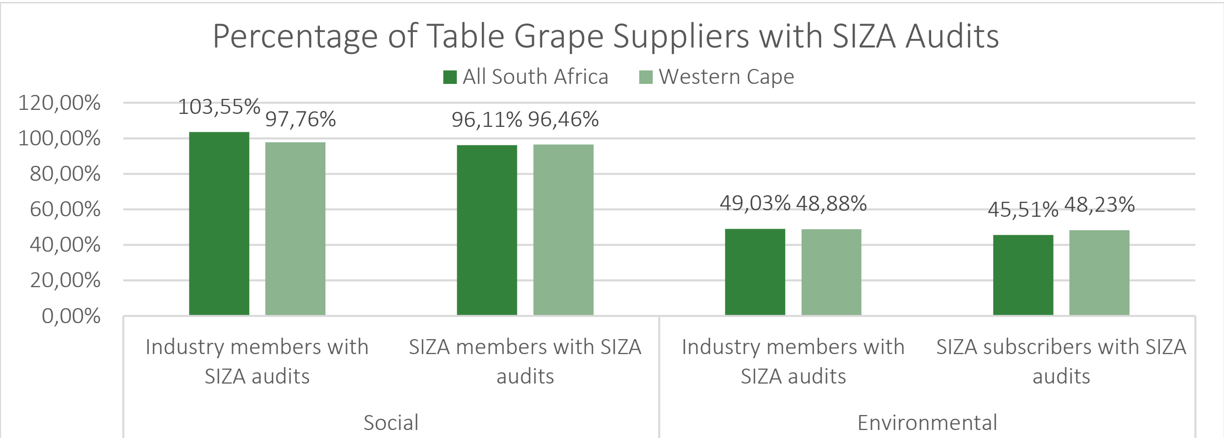
Commodity Statistics: SIZA and Industry Comparison

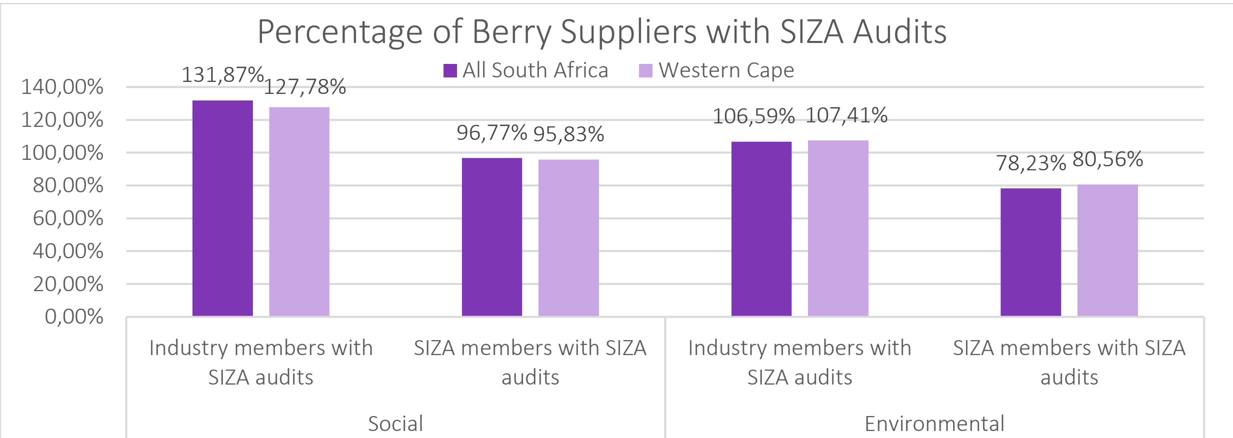
Although many agri-industry suppliers are represented within the SIZA programme and have already conducted several SIZA Social (Ethical) audits, not all have conducted SIZA Environmental audits. As SIZA is a voluntary programme, the growth in the number of subscriptions and audits is primarily driven by market requests to conduct Environmental audits. Thus, it is expected that the number of SIZA subscribers voluntarily conducting SIZA Environmental audits will increase in the future. 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 and most recent seasonal data not being available yet, 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 (393 subscribers), Pome Fruit (378 subscribers), and Table Grapes (226 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.


Percentage of Pome Fruit Suppliers with SIZA Audits
All South Africa
Western Cape
120,00%
100,00%
80,00%
60,00%
40,00%
20,00%
0,00%
64,91%
69,04%
96,45%
97,35%
22,33%
25,89%
33,18%
36,51%
Industry subscriptions with SIZA audits
SIZA subscriptions with SIZA audits
Industry members with SIZA audits
SIZA subscribers with SIZA audits
Social
Environmental


Percentage of Stone Fruit Suppliers with SIZA Audits
All South Africa
Western Cape
120,00%
100,00%
80,00%
60,00%
40,00%
20,00%
0,00%
47,47%
49,09%
95,28%
96,44%
11,99%
12,44%
24,06%
24,43%
Industry subscriptions with SIZA audits
SIZA subscriptions with SIZA audits
Industry members with SIZA audits
SIZA subscribers with SIZA audits
Social
Environmental

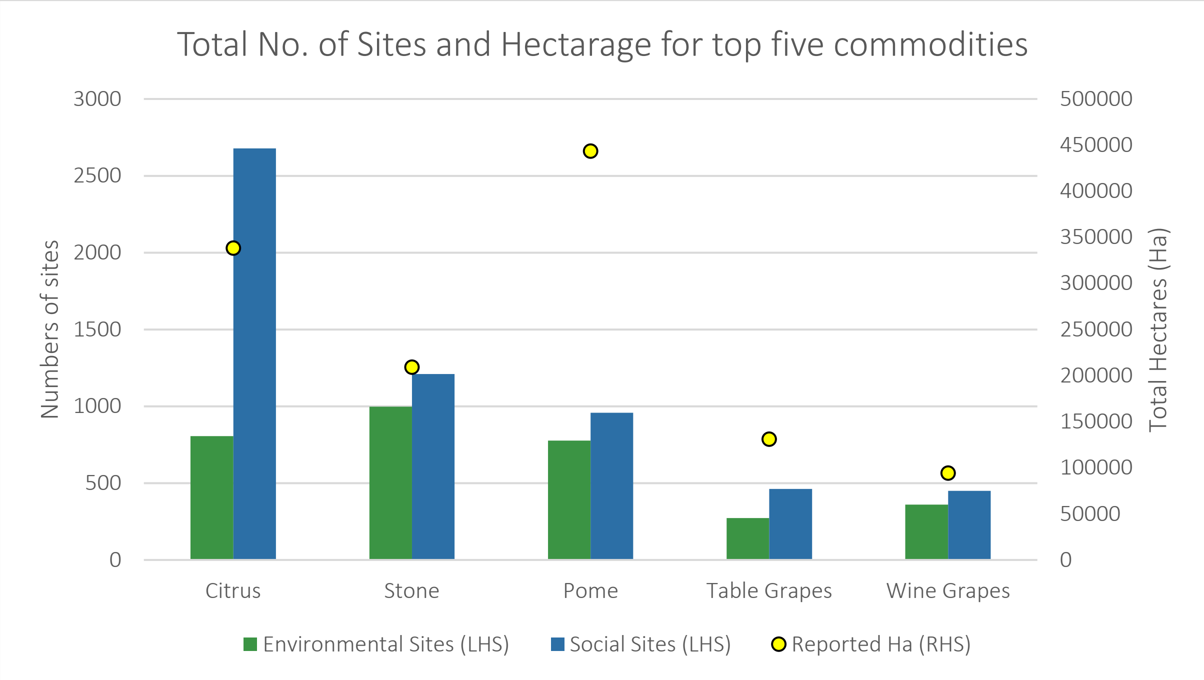

Percentage of Table Grape Suppliers with SIZA Audits
All South Africa
Western Cape
120,00%
100,00%
80,00%
60,00%
40,00%
20,00%
0,00%
103,55%
97,76%
96,11%
96,46%
49,03%
48,88%
45,51%
48,23%
Industry members with SIZA audits
SIZA members with SIZA audits
Industry members with SIZA audits
SIZA subscribers with SIZA audits
Social
Environmental


Percentage of Berry Suppliers with SIZA Audits
All South Africa
Western Cape
140,00%
120,00%
100,00%
80,00%
60,00%
40,00%
20,00%
0,00%
131,87%
127,78%
96,77%
95,83%
106,59%
107,41%
78,23%
80,56%
Industry members with SIZA audits
SIZA members with SIZA audits
Industry members with SIZA audits
SIZA members with SIZA audits
Social
Environmental

Commodity Statistics: Hectarage and Sites

The below graph 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. 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.

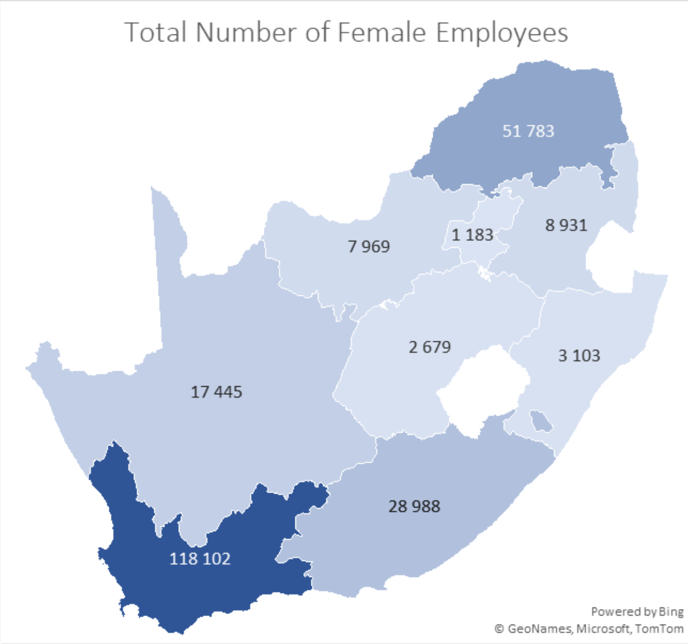
This could result in significant differences between the total hectares per commodity under SIZA and the respective industry bodies compared to the number of Sites registered within SIZA.

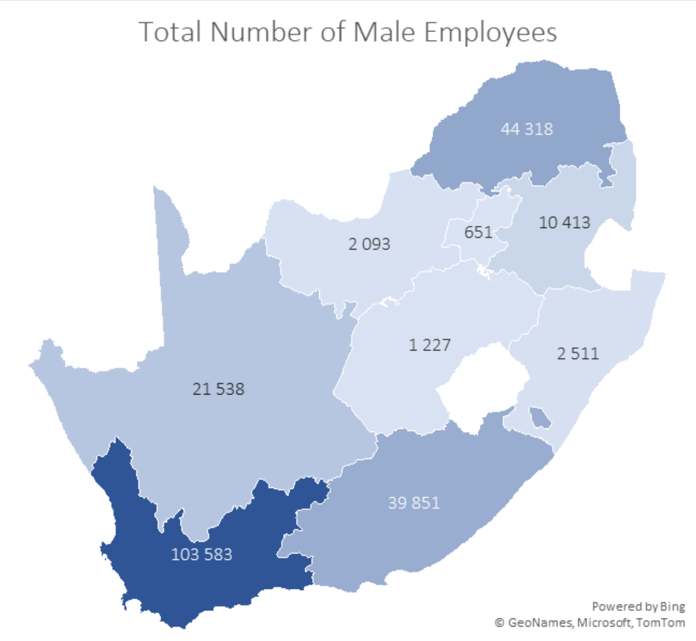


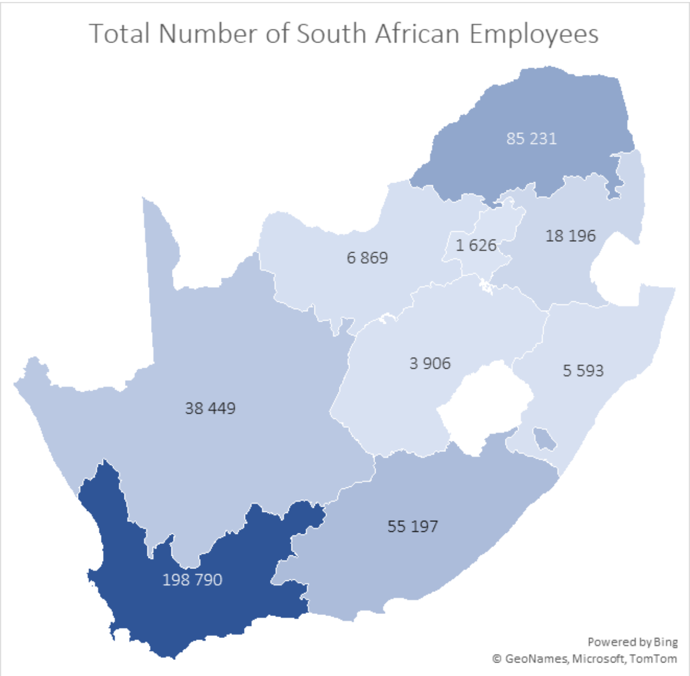
1.5 Workforce and Wages Overview

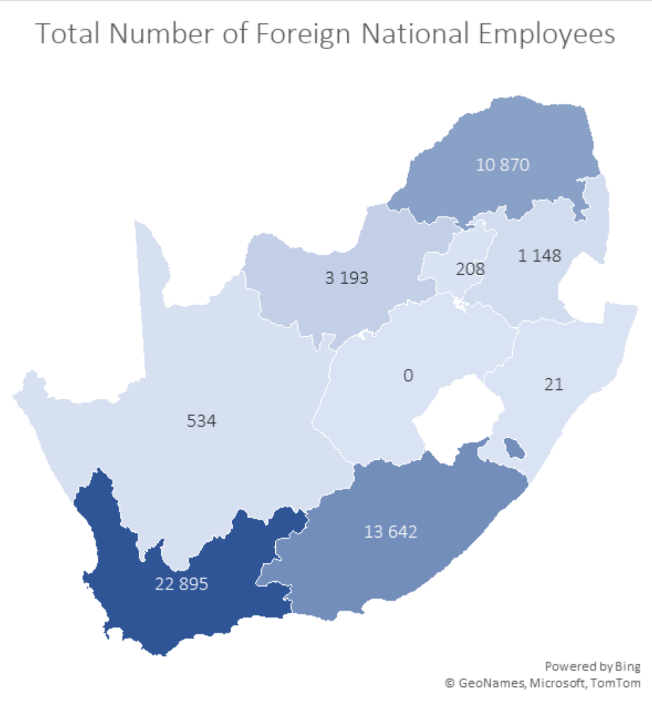
Worker Summary

The following represents information relating to agricultural workers working on farms registered under the SIZA programme. Data is obtained from the SAQs completed by the supplier himself or herself and approved by the SIZA compliance specialist over the last 12 months. The Western Cape accounts for the highest number of employees (46,57%) due to the large number of fruit suppliers who are SIZA subscribers based in the Western Cape.









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	727	372	2 673	2 680	0	0	316	508	7 276
Eastern Cape	9 881	3 655	21 876	18 926	377	482	7 717	5 925	68 839
Free State	727	1 203	500	1 476	0	0	0	0	3 906
Gauteng	322	421	216	639	12	16	101	107	1 834
KwaZulu-Natal	1 107	1 018	852	1 534	537	545	15	6	5 614
Limpopo	16 881	11 807	18 367	34 000	2 254	1 922	6 816	4 054	96 101
Mpumalanga	4 868	2 702	4 103	5 806	559	158	883	265	19 344
Northern Cape	4 291	1 405	17 042	15 711	0	0	205	329	38 983
North West	885	692	683	4 429	5	175	520	2 673	10 062
Western Cape	37 384	23 491	50 943	76 836	5 314	4 822	9 942	12 953	221 685
Total Workers per Type	**77 073**	**46 766**	**117 255**	**162 037**	**9 058**	**8 120**	**26 515**	**26 820**	**473 644**

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

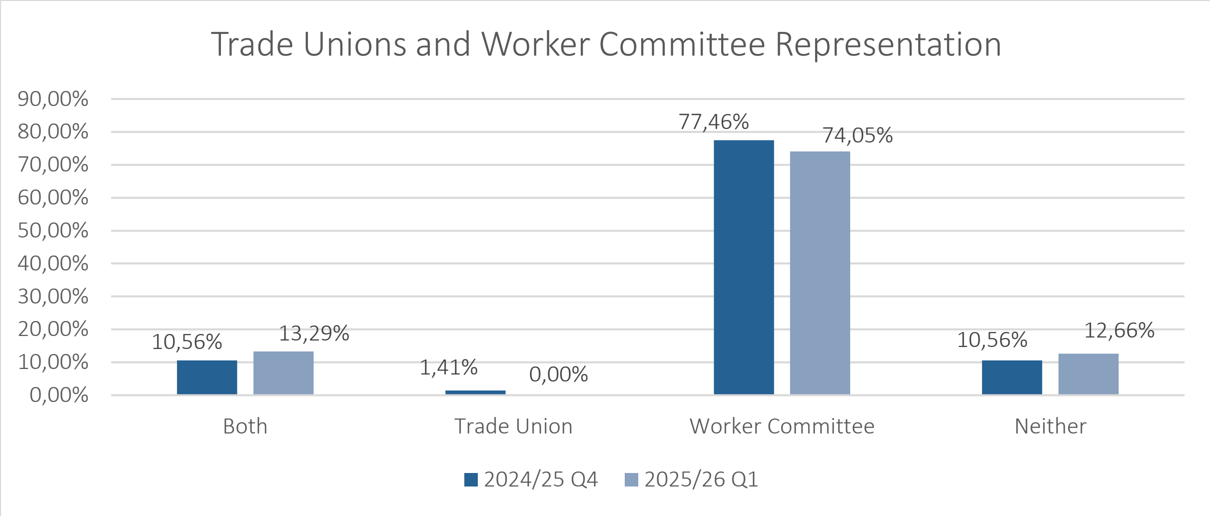
Percentage of suppliers with a TES and a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,00%	0,00%	0,24%	0,00%	0,00%	0,00%	0,00%	0,00%	6,68%
Pome Fruit	0,00%	0,00%	0,24%	0,00%	0,00%	0,00%	0,00%	0,00%	5,25%
Citrus	0,62%	0,00%	0,12%	0,00%	2,84%	0,99%	0,00%	0,00%	3,70%
Table grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,91%
Wine Grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	11,92%

Percentage of suppliers with a TES and without a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,24%	0,00%	0,48%	0,00%	0,72%	0,00%	0,00%	0,00%	17,18%
Pome Fruit	0,24%	0,00%	0,24%	0,00%	0,00%	0,00%	0,00%	0,00%	10,98%
Citrus	1,73%	0,00%	0,12%	0,00%	2,59%	0,49%	0,00%	0,00%	10,11%
Table grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	4,57%
Wine Grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	25,77%

Percentage of suppliers without a TES and with a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,24%	0,24%	0,00%	0,00%	0,24%	0,00%	0,00%	0,48%	49,88%
Pome Fruit	3,34%	2,15%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	52,51%
Citrus	17,88%	0,00%	0,00%	0,74%	5,80%	1,73%	2,22%	0,37%	21,45%
Table grapes	0,00%	0,00%	0,00%	0,00%	4,27%	0,00%	18,90%	0,30%	46,34%
Wine Grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	1,67%	0,00%	39,62%

Percentage of suppliers without a TES and without a Union									
Commodity	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Stone Fruit	0,72%	0,00%	0,00%	0,00%	0,24%	0,00%	0,00%	0,00%	10,74%
Pome Fruit	1,43%	0,48%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	15,04%
Citrus	3,21%	0,00%	0,00%	0,00%	3,45%	1,11%	0,62%	0,00%	3,58%
Table grapes	0,00%	0,00%	0,00%	0,00%	2,44%	0,00%	2,44%	0,30%	14,02%
Wine Grapes	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	9,46%

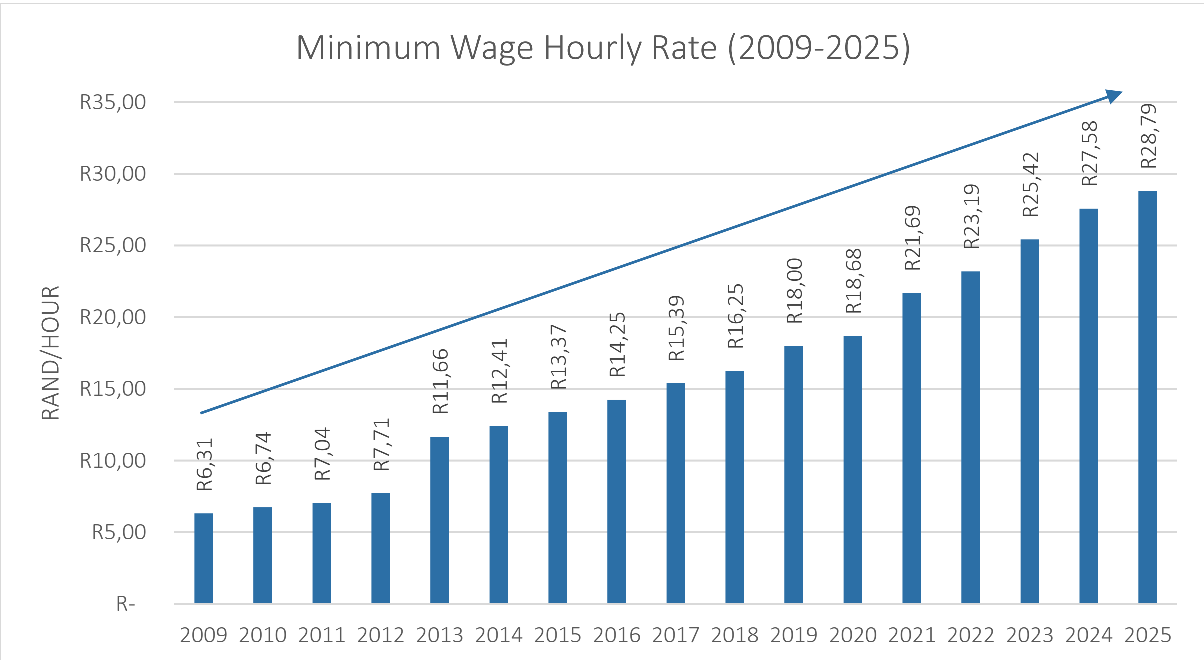
The below graph illustrates the intersection between labour unions' representation and worker committees. This graph compares the proportions of worker protection associations between Q4 of 2024/2025 and Q1 of the 2025/2026 reporting period. This graph suggests that the prevalence of unions and workers' committees is independent of one another. A total of 87,34% of subscribers in Q1 of 2025/2026 recognised worker committees (74,06% recognising just worker committees, and 13,29% recognising both worker committees and unions). The remaining 12,66% of subscribers have neither. Interestingly, no subscribers had a union without a worker committee.



Increase in Wages Over Time

Over the past 16 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 for employees, they have also posed growing challenges for suppliers facing rising operational costs each season and each 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.

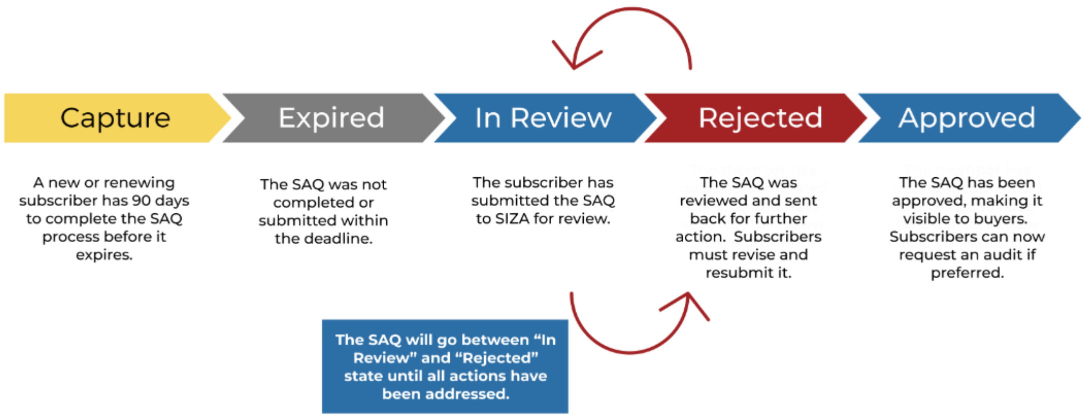


2. SELF-ASSESSMENT QUESTIONNAIRE ANALYSIS

The purpose of the SAQ is for primary subscribers to have 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 tool to maintain audit results between the three- or two-year audit validating period. Between audit monitoring forms part of market requirements and EU due diligence to ensure that human rights are upheld at all times.

The SAQ Process

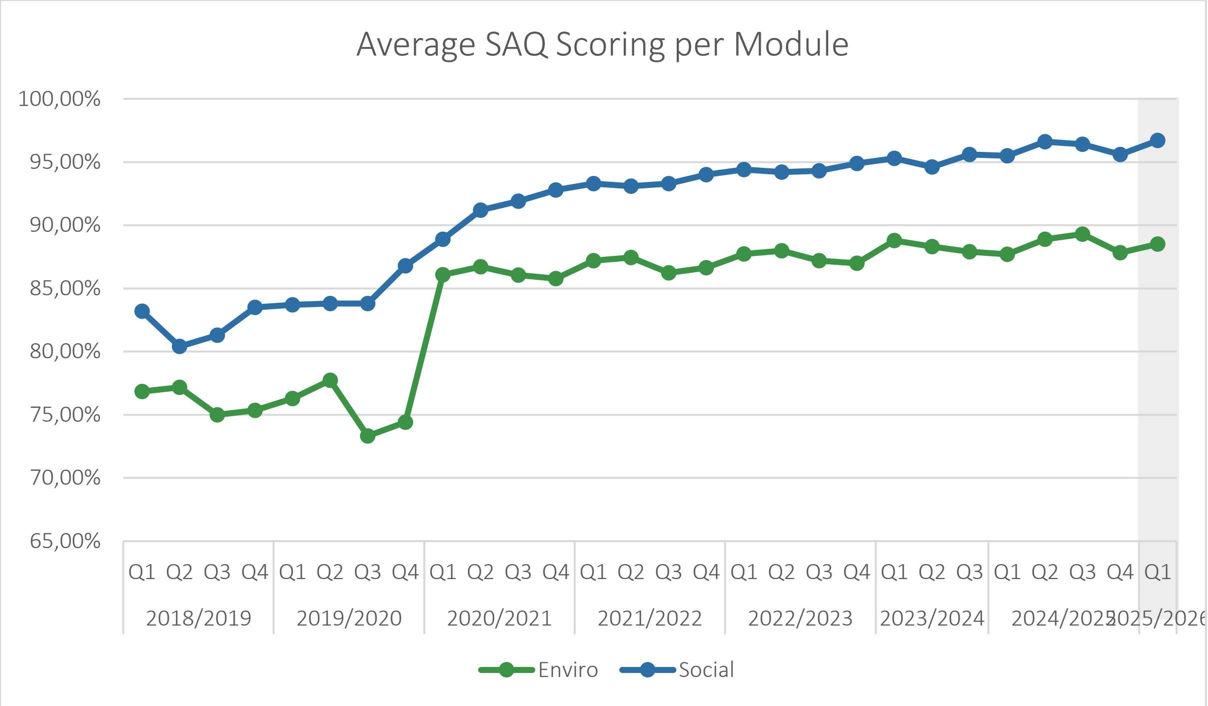
The image below depicts the SAQ process. More information about the details of the process is available on the SIZA website: https://siza.co.za/completing-the-saq/



SAQ Scoring

SIZA SAQ percentages are risk-based, and not completion-based, meaning that the percentage score assigned to each SAQ is based on the risk level associated with the subscriber's answers, not an indication of 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. MySIZA allows for feedback to the subscriber using a risk indicator, which scores each answer according to the risk it holds. SIZA SAQ percentages are risk-based, and not completion-based, meaning that the percentage score assigned to each SAQ is based on the risk level associated with the subscriber's answers, not an indication of how many questions were completed.

The average score for all Social (Ethical) SAQs approved in Q1 is 96,70%. The highest score for an approved Social SAQ in this period is 99,44%. SIZA administrative staff try to 1) only approve SAQs for existing subscribers with a SAQ risk score above 85% (5% higher than 2020) and 2) complete a maximum of three SAQ reviews before approval. SIZA compliance experts assist new SIZA subscribers in improving their scores year-on-year as part of continuous improvement. The average score for all Environmental SAQs approved in Q1 2025/2026 is 88,50%. The highest score for an approved Environmental SAQ in this period is 97,89%.

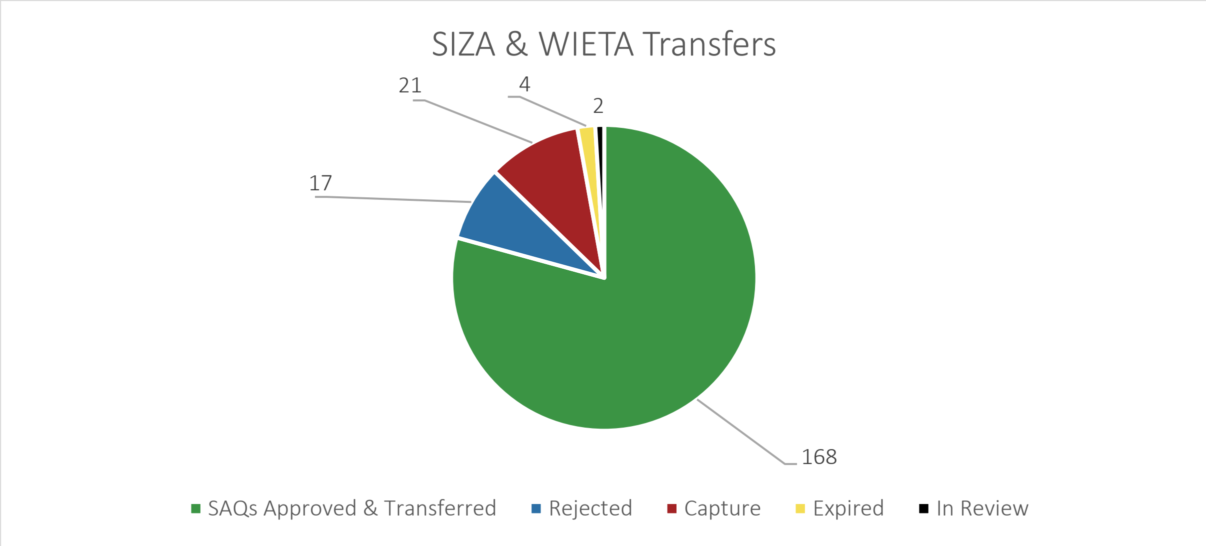


WIETA Collaboration

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 2017, enables subscriptions with both programmes to combine these two audits on one day but still receive separate audit reports and Audit Completion Letters because 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, 212 SIZA subscribers have utilised this function. 168 of these SAQs have already been reviewed and approved, resulting in successful transfers to the WIETA platform.



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 enables a streamlined auditing process, enabling 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 130 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

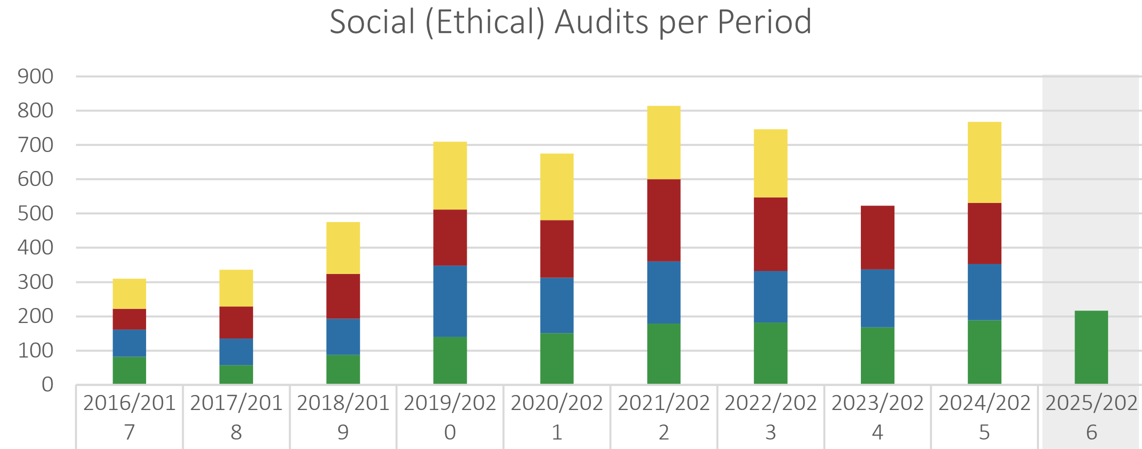
3.1 Audit Activity Overview

Social and Environmental Audits per Period

SIZA adopted a third-party audit approach to allow for a credible and objective process, which can be a true independent and objective reflection of the audit outcome on 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.

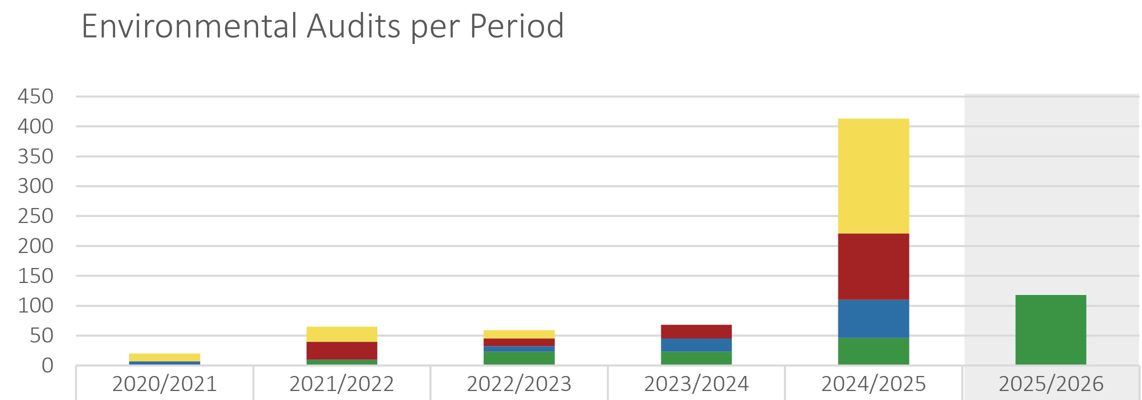
As with the growth in subscriptions, we saw steady growth over the last nine years in the number of Social (Ethical) audits per year. Since 2016, 5 572 Social (Ethical) audits have been conducted. It is important to take note of the SIZA Audit Frequency Matrix, which results in some suppliers achieving 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), 795 Social audits were conducted, while in the past three months (Q1), between 1 April and 30 June 2025, 216 Social audits were conducted. This steady growth can be related to SIZA becoming a multisector agri-wide programme. The graph below indicates the number of audits per quarter for every year since 2016 and showcases the steady, gradual increase of Social (Ethical) audits over time.



	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025	2025/2026
Q4	88	107	151	198	194	214	199		236	
Q3	61	94	131	164	168	240	215	186	178	
Q2	79	77	105	208	162	181	150	169	165	
Q1	82	58	88	140	151	179	182	168	188	216

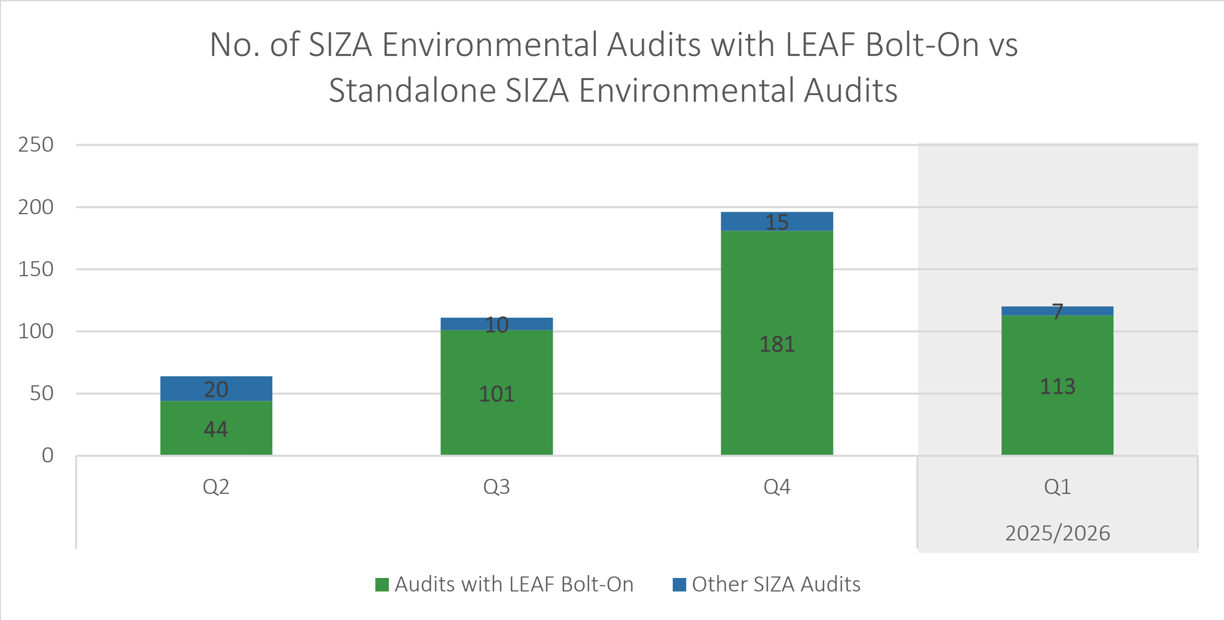
During the Q1 2025/2026 reporting period, 118 environmental audits were conducted, a drastic increase of 72 audits from Q1 2024/2025. This can be attributed to specific markets, indicating that their suppliers must comply with an environmental sustainability standard such as LEAF Marque. SIZA completed the benchmark against the Leaf Marque standard and formed a partnership and agreement with them to work together to avoid duplication and save costs.



	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025	2025/2026
Q4	13	25	14		192	
Q3	0	30	13	23	111	
Q2	6	1	9	22	64	
Q1	1	9	23	23	46	118

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.

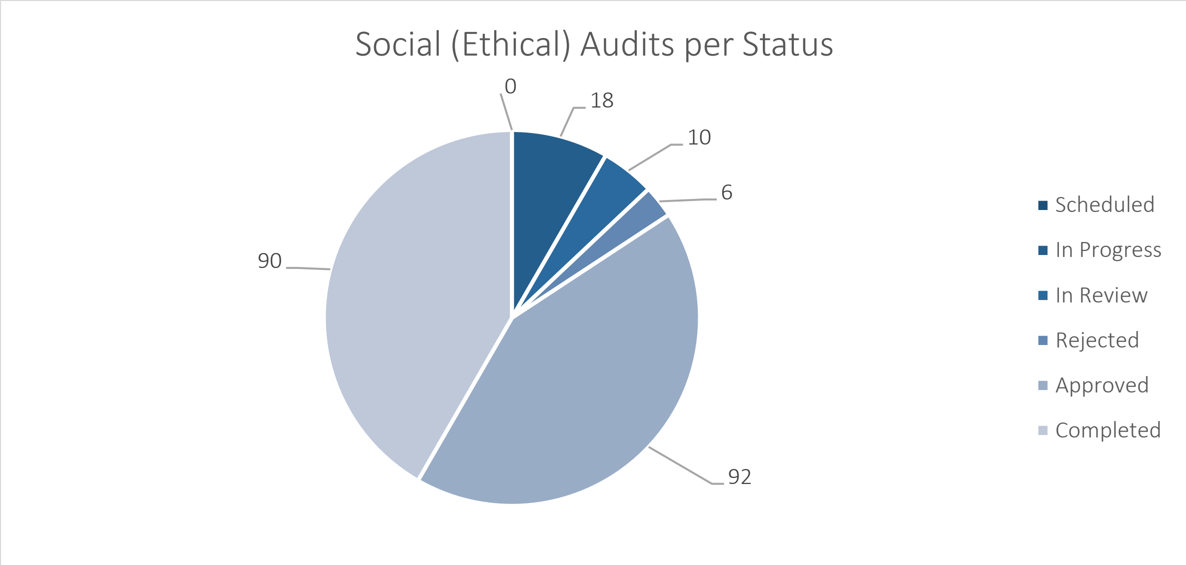
In the most recent reporting period, approximately 76% of all SIZA Environmental audits were conducted as both a combined audit with GLOBALG.A.P., and with the LEAF Bolt-On. Roughly 18% of SIZA Environmental audits were conducted solely with the LEAF Bolt-On, while approximately 3% conducted as standalone SIZA audits, and another 3% 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 113 Environmental audits were conducted with the LEAF Bolt-On, while the remaining seven did not include the LEAF Bolt-On.



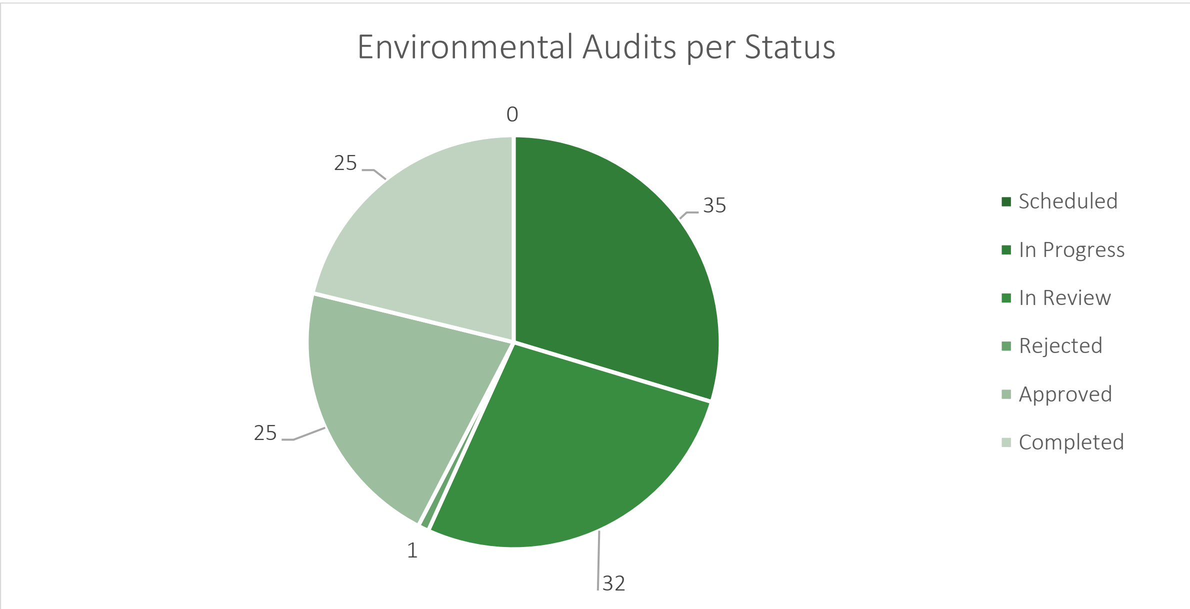
Audits Status

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 216 social audits conducted during Q1, 90 have already been completed in full, and 92 are in Approved status and awaiting corrective actions that must be uploaded by the supplier. The remaining 34 audits are rejected (6), in progress (18), or still being reviewed (10) 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.

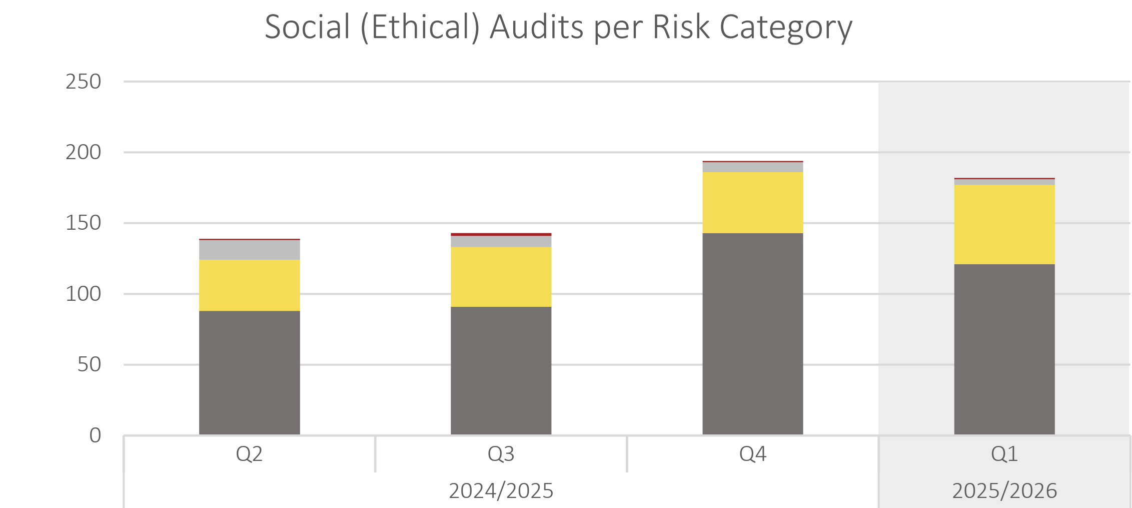


Of the 118 environmental audits conducted during Q1 of 2025/2026, 25 have already been completed, and 25 are approved and are awaiting corrective actions, which the supplier must upload. The remaining 68 audits are either still in progress (35), rejected (1) or being reviewed by the audit firms (32). It is important to note that timelines are allocated to all the steps in the audit process for both the auditor and the auditee.



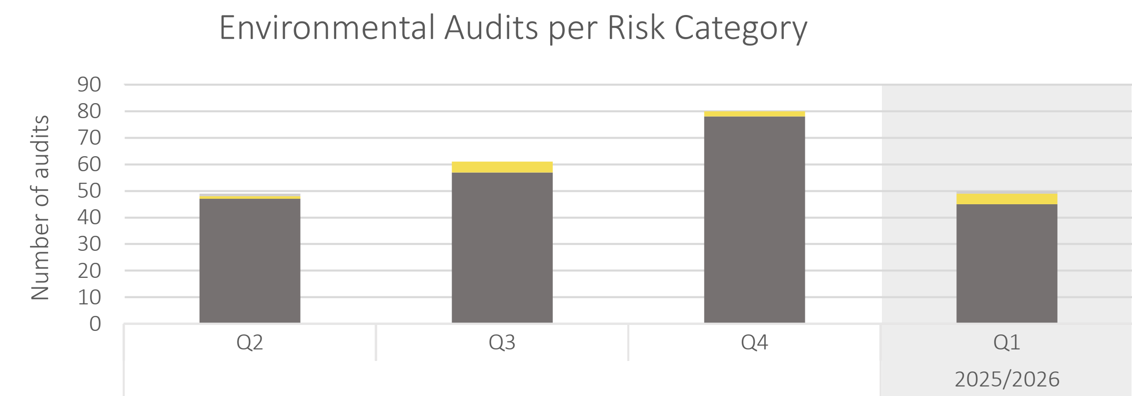
Audits per Audit Frequency Risk Category

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.



	Q2	Q3	Q4	Q1
		2024/2025		2025/2026
Bronze	1	2	1	1
Silver	14	8	7	4
Gold	36	42	43	56
Platinum	88	91	143	121

Of the social audits done during this reporting period, 121 achieved Platinum status, and 56 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 done during this period, 68 were in the Western Cape, of which 50 achieved Platinum status, and 17 achieved Gold status. Suppliers are showcasing their commitment to continuous improvement, which is evaluated and proven by the third-party audit outcomes.



	Q2	Q3	Q4	Q1
				2025/2026
Bronze	0	0	0	0
Silver	1	0	0	1
Gold	1	4	2	4
Platinum	47	57	78	45

During this reporting period, 45 environmental audits were conducted, with 45 achieving Platinum status and one achieving Gold. 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 45 audits, 33 took place in the Western Cape, where 32 achieved Platinum and one achieved Gold.

3.2 Non-Conformance (NC) Trends for the Period of 1 April – 30 June 2025

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 explained by the increasing number of audits and increased training among auditors, leading 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 subscriptions 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:

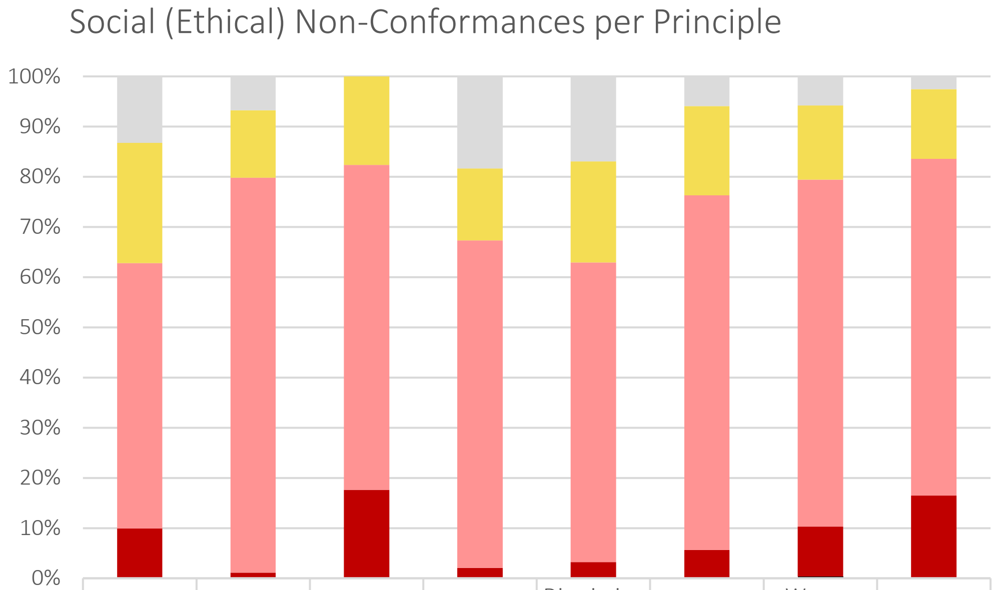
- Management systems
- Forced Labour (Employment is Freely Chosen)
- Child Labour
- Freedom of Association
- Discrimination, Harassment, and Abuse
- Health & Safety
- Wages, Benefits, and Terms of Employment
- Working Hours

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

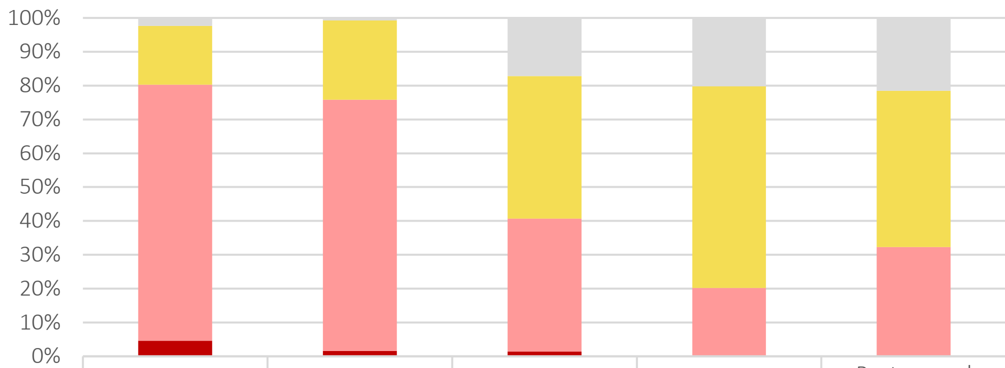
In Q1 of 2025/2026, most non-conformances raised under the SIZA Social standard are minor non-conformances, which are the majority of findings for each principle code under the SIZA Social module. The below graph depicts the proportion of findings per risk category for each principle's code under the SIZA Social standard in the most recent reporting period.



	Management Systems	Employment is Freely Chosen	Child Labour & Young Workers	Freedom of Association	Discrimination, Harassment & Abuse	Health & Safety	Wages, Benefits & Terms of Employment	Working Hours
Recommendation	13%	7%	0%	18%	17%	6%	6%	3%
Observation	24%	13%	18%	14%	20%	18%	15%	14%
Minor	53%	79%	65%	65%	60%	71%	69%	67%
Major	10%	1%	18%	2%	3%	6%	10%	16%
Critical	0%	0%	0%	0%	0%	0%	0%	0%

In Q1 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 codes of Management Systems (76%) and Minimising Negative Impacts (76%). Observations represent the largest portion of non-conformances for the remaining title codes, namely Measured and Efficient Use (42%), Shifting to Alternatives (60%), and Restore and Conserve Ecosystems (46%). 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.

Environmental Non-Conformances per Principle

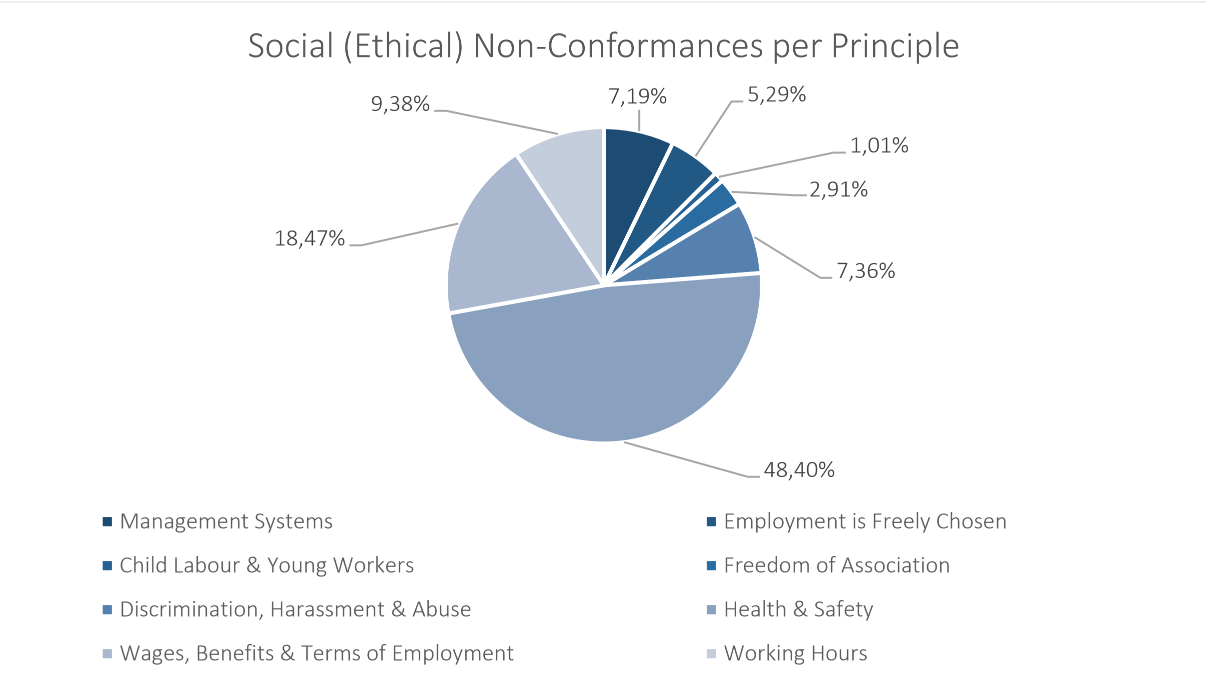


	Management Systems	Minimising Negative Impacts	Measured and Efficient Use	Shifting to Alternatives	Restore and Conserve Ecosystems
Recommendation	2%	1%	17%	20%	22%
Observation	17%	23%	42%	60%	46%
Minor	76%	74%	39%	20%	32%
Major	5%	2%	1%	0%	0%
Critical	0%	0%	0%	0%	0%

Social and Environmental Non-Conformances per Category

In Q1 2025/2026, most non-conformances (76,25%) fell in the following three categories, namely:

- Health & Safety (815 findings);
- Wages, Benefits, and Terms of Employment (311 findings); and
- Working Hours (158 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:

- No health and safety risk assessment available that covers all health and safety risks within the business.
- Housing for employees does not meet basic health, safety and hygiene requirements as set out in this Standard and local law. This refers to broken/inadequate fixtures, leaking roofs, potential damage to windows/walls/pipes or electrical wiring etc.
- 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.

Wages, Benefits & Terms of Employment:

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

- Lack of written contracts of employment provided to employees, including seasonal and temporary workers.
- Payslips provided do not contain all the legislatively required information.
- Contracts note updated to reflect material change to terms and conditions of employment.

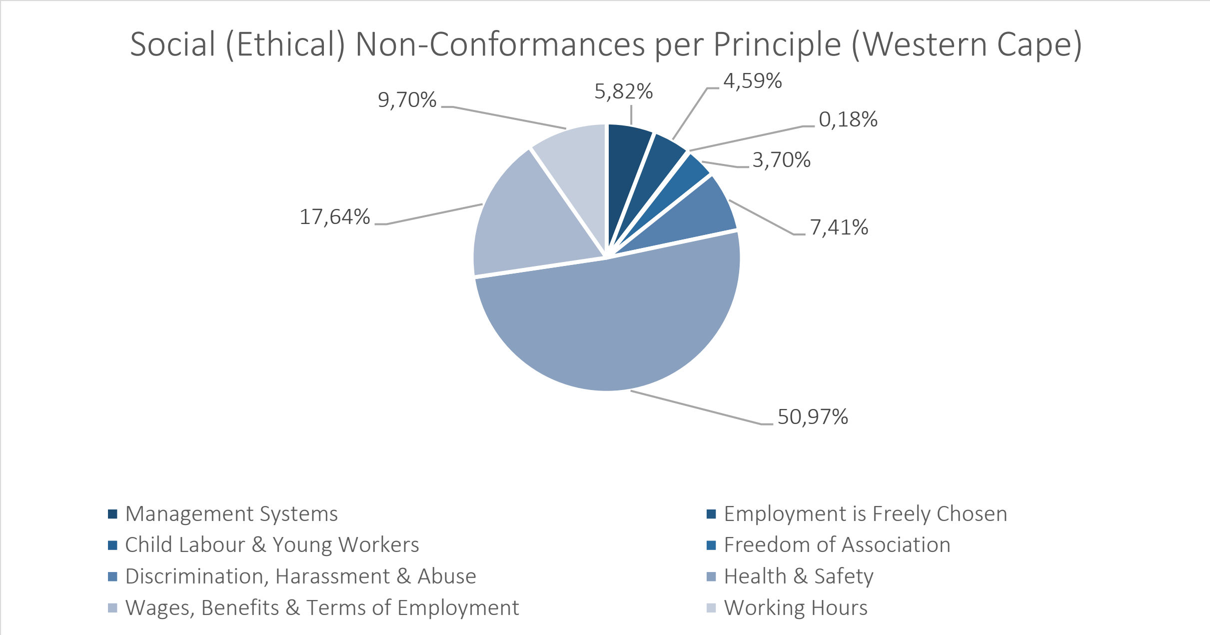
Working Hours:

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 requirements.
- Night work is not managed and implemented in accordance with the minimum legislative requirements.

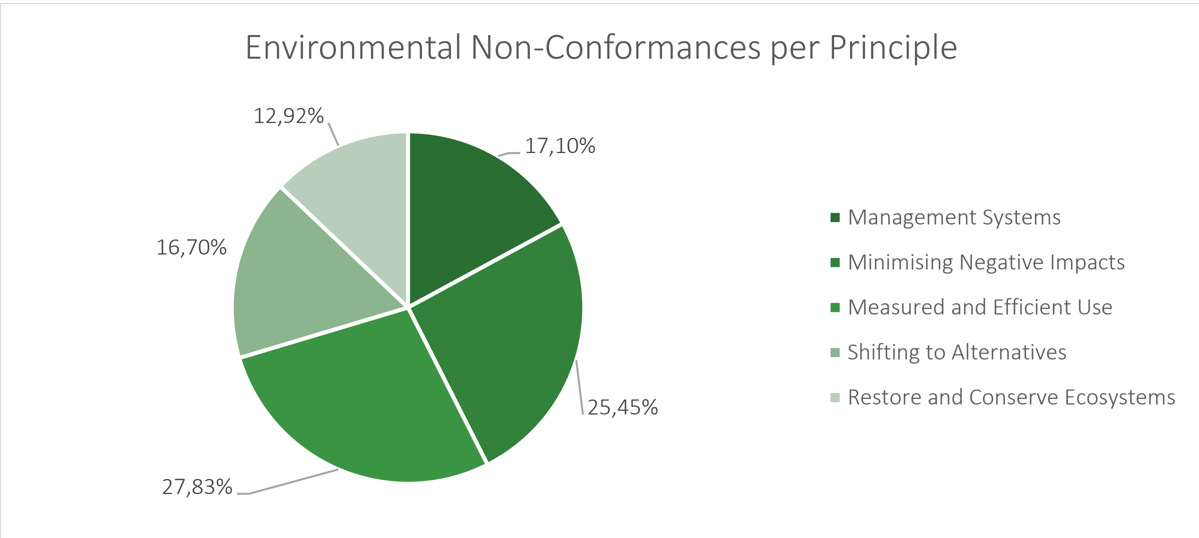
For the Western Cape, most non-conformances (78,31%) fell in the following three principles, namely:

- Health & Safety (289 findings);
- Wages, Benefits, and Terms of Employment (100 findings); and
- Working Hours (55 findings)



In Q1 2025/2026, most non-conformances (70,38%) fell in three principles, namely:

- Measured and Efficient Use (140 findings)
- Minimising Negative Impacts (128 findings) and
- Management Systems (86 findings)



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:

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 system in place indicating working towards calculating their carbon footprint.

- No evidence of an overall reduction of waste intensity measured in Kg of waste per Kg of produced commodity.
- No implementation of recycling or insufficient evidence pertaining to waste management and recycling, including the setting of target for recycling and reuse.

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:

- Insufficient evidence that staff are effectively and regularly trained in safe/appropriate IAP clearing methods and techniques.
- Insufficient evidence of an IAP clearing plan with realistic targets/goals.
- Lack of evidence that the business can avoid the cultivation of IAP species on-site.

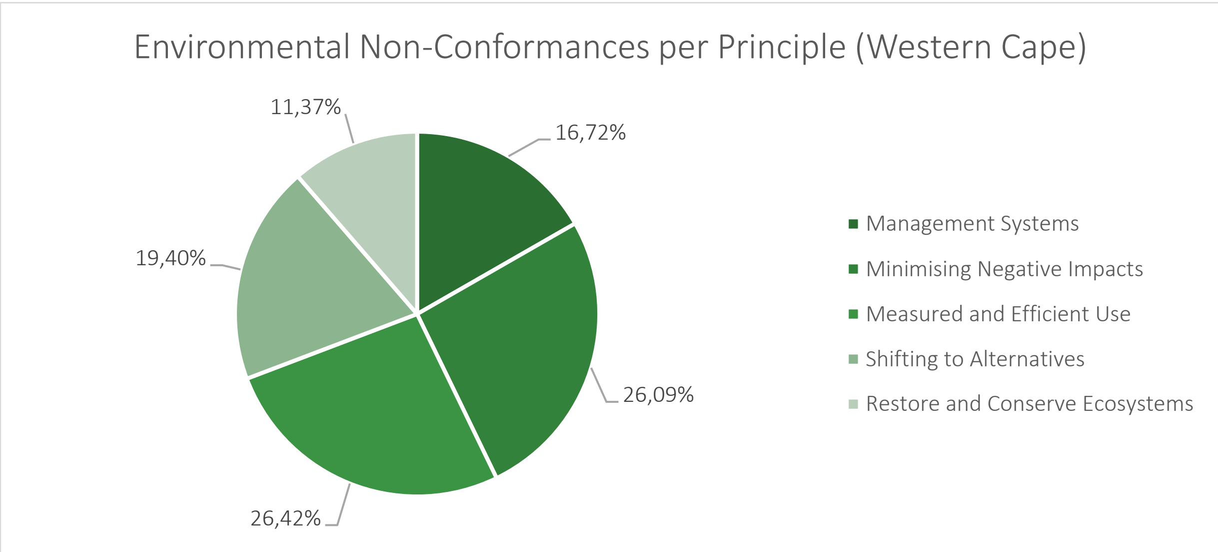
Management Systems

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

- Lack of compliance with legal requirements regarding the effective removal and management of alien invasive species.
- Risk assessments do not fully cover aspects of the environmental impacts of energy, materials, and waste.
- Lack of evidence that the environmental management policy is communicated to staff, contractors, and external stakeholders.

For the Western Cape in Q1 2025/2026, most non-conformances (71,91%) fell into three principles, namely:

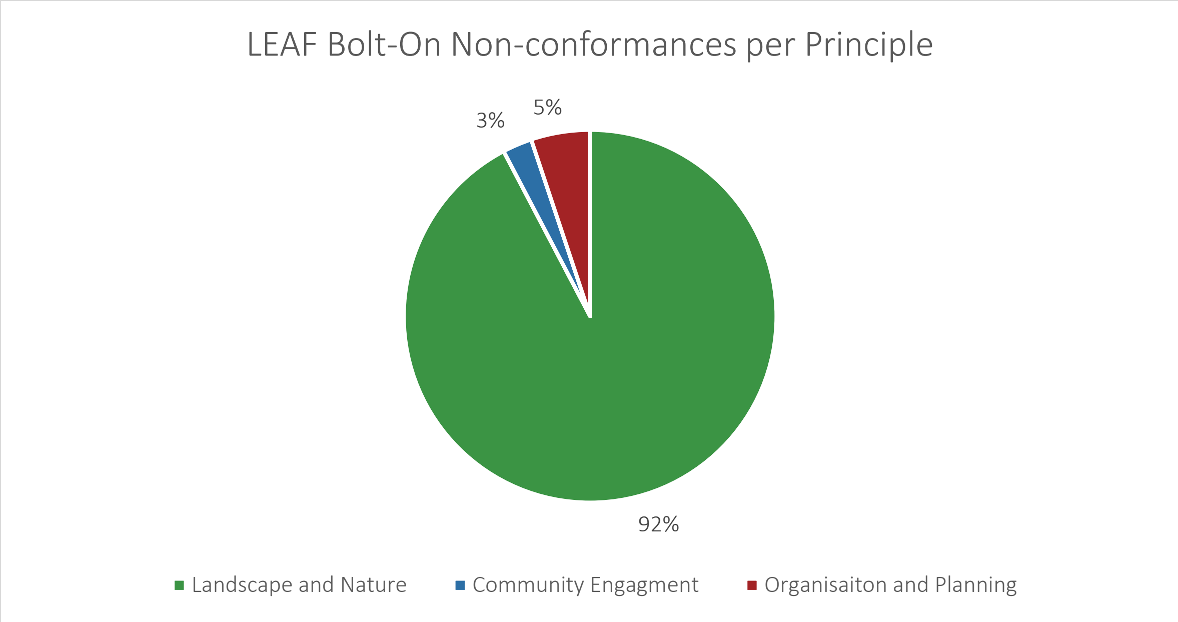
- Measured and Efficient use (79)
- Minimising Negative Impacts (78) and
- Shifting to Alternatives (58)



The LEAF bolt-On option monitors non-conformances according to the following categories:

- Landscape and Nature Conservation (72 findings)
- Organisation and Planning (4 findings)
- Community Engagement (2 findings)

The below graph depicts the proportions of non-conformances found during combined audits conducted on the LEAF Marque standard. This graph indicates that most non-conformances occur within the Landscape and Nature Conservation principle (92%).



Risk Category Distribution

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:

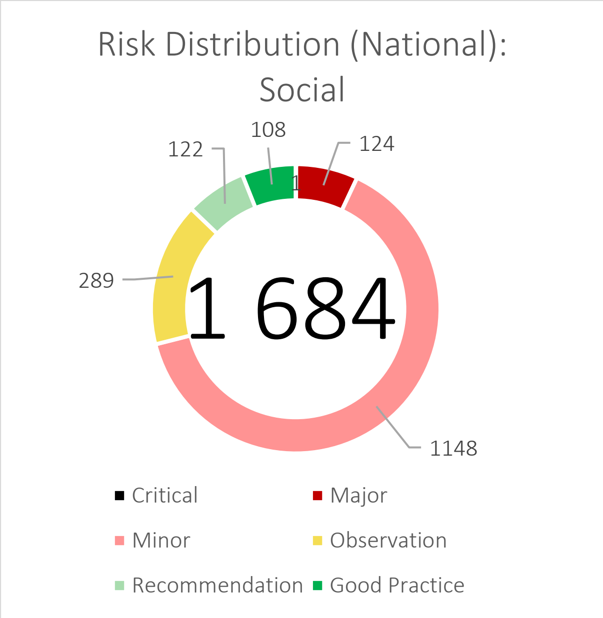
- An occasional or isolated problem.
- An issue which presents a low risk to the environment and/or workers on-site.
- A policy issue or misunderstanding where there is no evidence of a material breach.

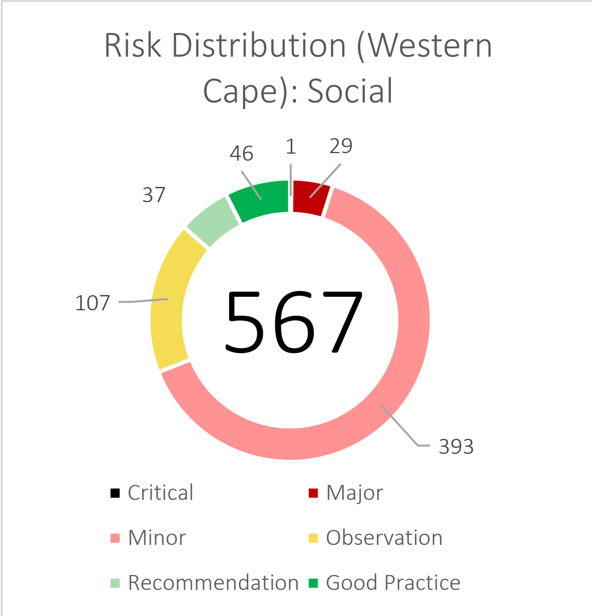
A major non-compliance is:

- 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.

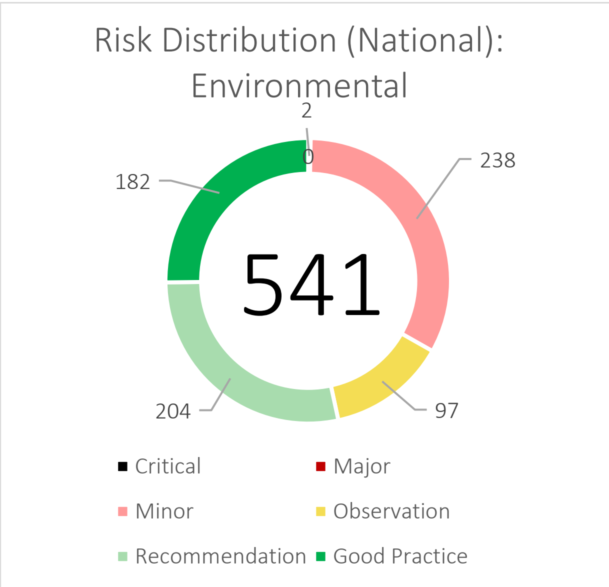
A critical non-compliance is:

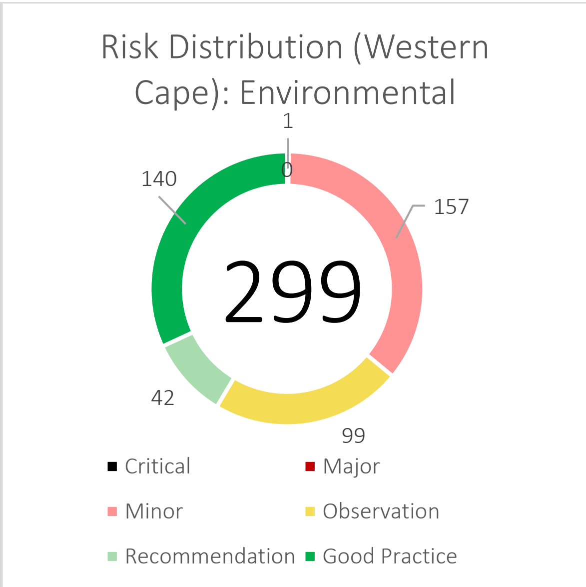
- An issue which presents imminent risk to the environment and/or workers' safety/risk to life and limb or constitutes a significant breach of workers' human rights, and/or;
- A major non-compliance that has not been addressed or for which no significant improvement has been made by the time of a follow-up 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.





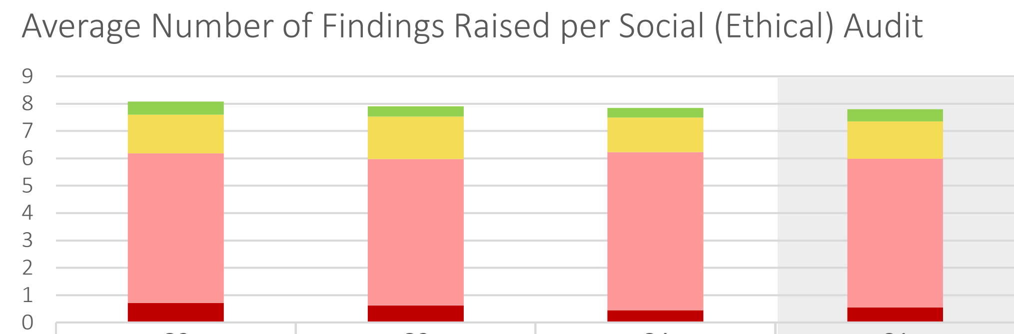
The graph above depicts the risk distribution regarding Social audits in the Western Cape for Q1 2025/2026, indicating that a majority of findings are either Minors (393), Observations (107) or Good Practices (46). The graph below similarly depicts the risk distribution regarding Environmental audits in the Western Cape for Q1 2025/2026, indicating that most findings are categorised as Minors (157), Good Practices (140), and Observations (99).





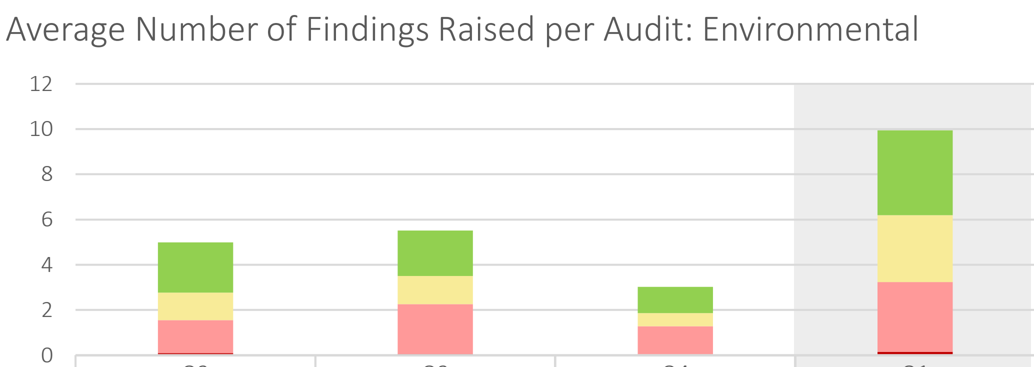
Average Findings per Social and Environmental Audit

The graph below indicates the average number of findings raised per Social audit. During Q1 of the 2025/2026 reporting period, an average of 7,80 findings were raised per audit. For the Western Cape, the average number of findings was slightly lower, at 7,42 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.



	Q2 2024/2025	Q3 2024/2025	Q4 2024/2025	Q1 2025/2026
Good Practice	0,48	0,37	0,35	0,45
Observation	1,41	1,55	1,26	1,36
Minor	5,47	5,36	5,78	5,44
Major	0,71	0,61	0,44	0,54
Critical	0,01	0,01	0,01	0,01

The graph below indicates the average number of findings raised per Environmental audit. During Q1 of the 2025/2026 reporting period, an average of 9,94 findings were raised per audit, with an average of 3,74 Good Practices per audit. For the Western Cape, the average number of findings was slightly higher, at 10,52 findings per audit on average, with an average of 4,3 Good Practices per audit.



	Q2	Q3	Q4	Q1 2025/2026
Good Practice	2,22	2	1,16	3,74
Observation	1,22	1,25	0,58	2,96
Minor	1,45	2,21	1,25	3,08
Major	0,1	0,05	0,03	0,16
Critical	0	0	0	0

In line with the average number of findings for audits conducted in Q1 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.

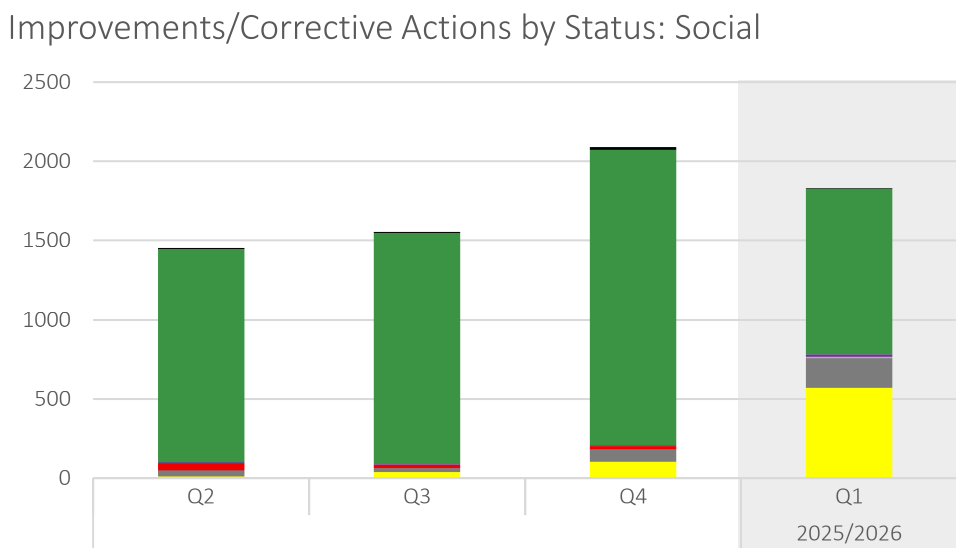
4. COMPLIANCE IMPROVEMENT

4.1. Implementation of Improvements

Corrective Actions Taken

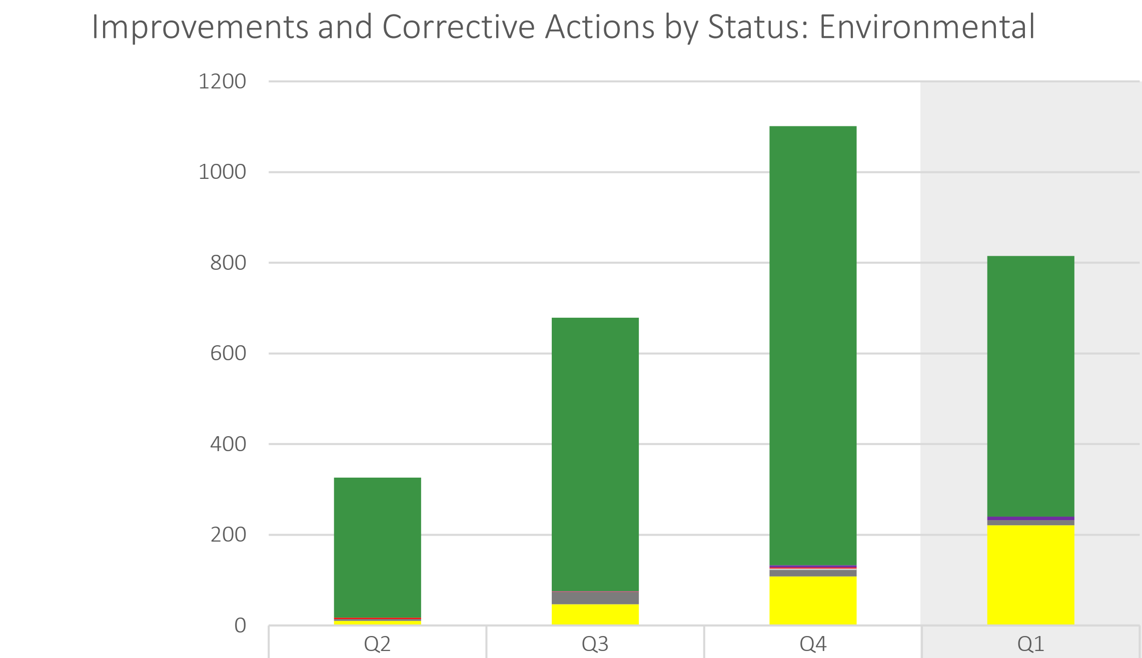
As a continuous improvement programme, SIZA places strong emphasis on addressing audit findings promptly, as timely submission and resolution of corrective actions not only reflect a supplier's commitment to compliance and improvement, but also maintain audit validity, reduce the frequency of future 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 during the 12 months following the audit date, while open non-conformances indicate that the supplier still needs to upload corrective action(s) to show improvement.



	Q2	Q3	Q4	Q1 2025/2026
Closed Late	5	6	16	1
Closed	1349	1461	1864	1049
Rejected	7	4	7	14
Expired	44	21	23	3
Improvement Uploaded	0	0	0	6
Document Uploaded	39	24	75	186
Open	10	39	104	571

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).

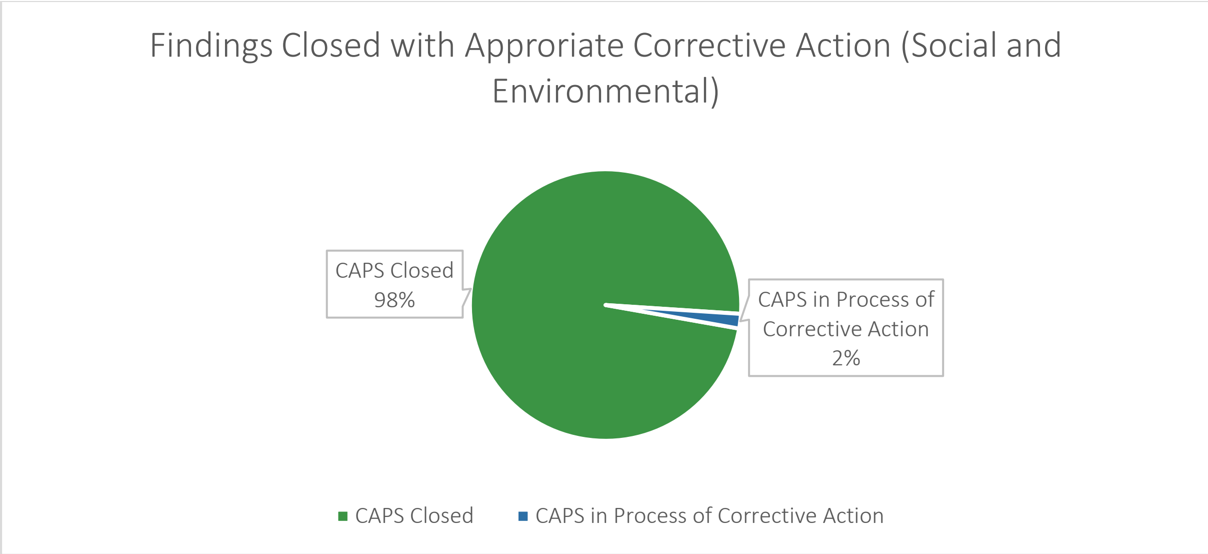


	Q2	Q3	Q4	Q1
Closed Late	0	0	0	0
Closed	309	603	968	575
Rejected	0	1	5	8
Expired	3	1	2	0
Improvement Uploaded	0	0	3	0
Document Uploaded	4	27	15	11
Open	10	47	108	221

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.

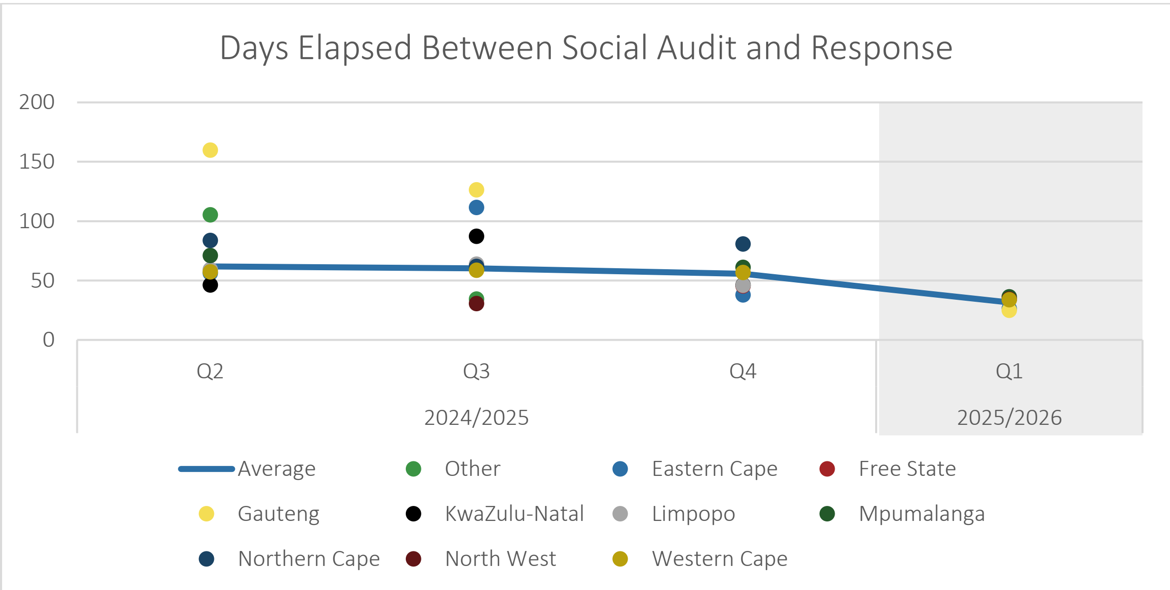
If one looks at the improvement that has taken place over time, it is worthwhile to look at the findings raised from 1 April 2016 until 30 June 2025. A total of 57,572 findings were raised during third-party audits, and 56,552 of these findings have already been successfully closed out and received improvements in practices. This means that 98,23% of all findings have been adequately resolved since 2016.

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

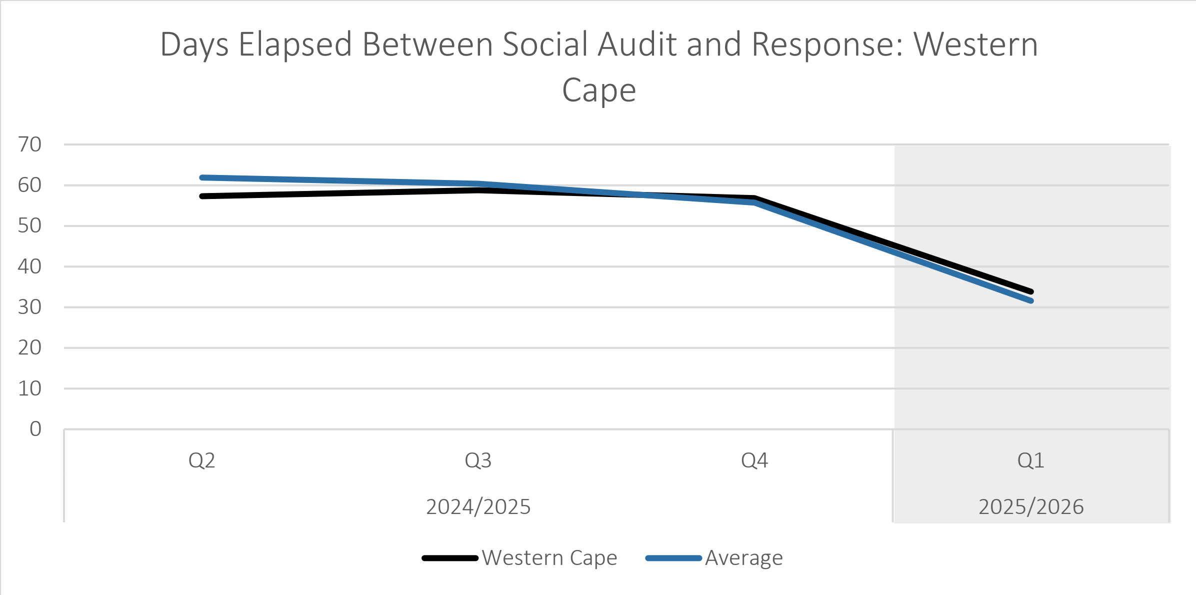


Time Elapsed Before Corrective Actions are Closed

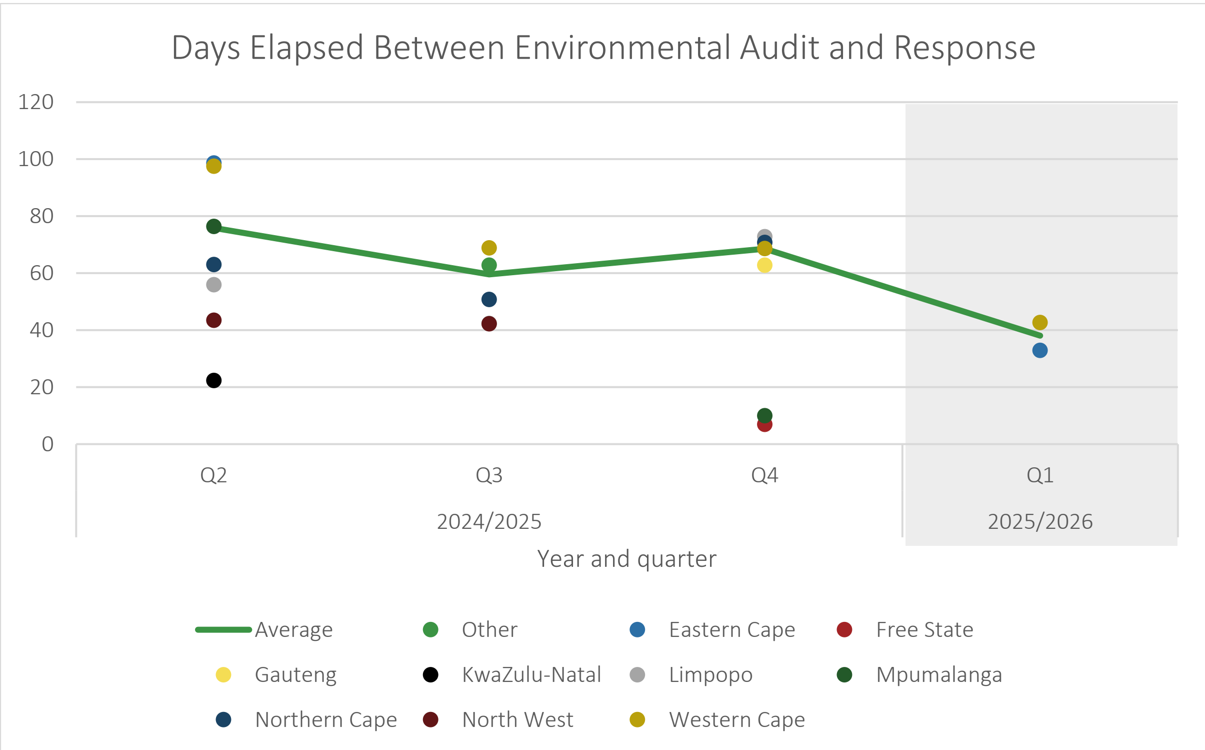
The graph below illustrates the average time delay between social audit findings and the implementation of corrective actions. The average number of days between the Social audit and the implementation of corrective actions has decreased from 61,87 days in Q2 of 2024/2025 to 31,57 days in Q1 of 2025/2026.



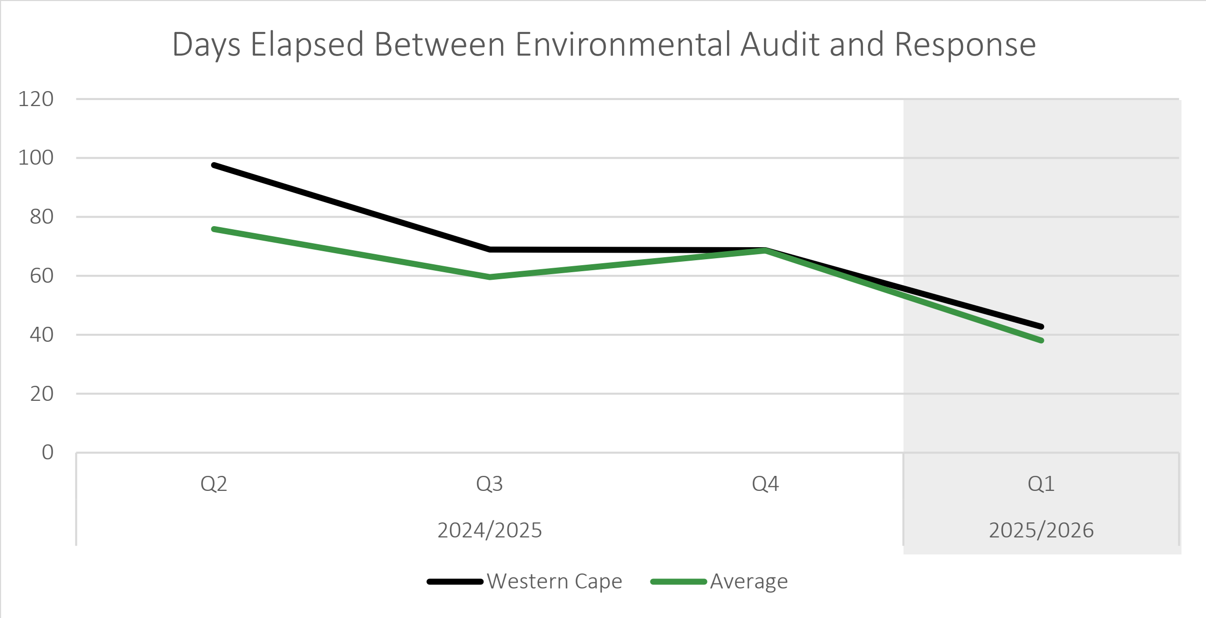
The Western Cape has largely followed the national trend regarding the duration of corrective actions on Social audits, declining from an average of 57,33 days in Q2 of 2024/2025 to an average of 33,82 days in Q1 of 2025/2026.



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 75,87 days in Q2 of 2024/2025, to 38,06 days in Q1 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.



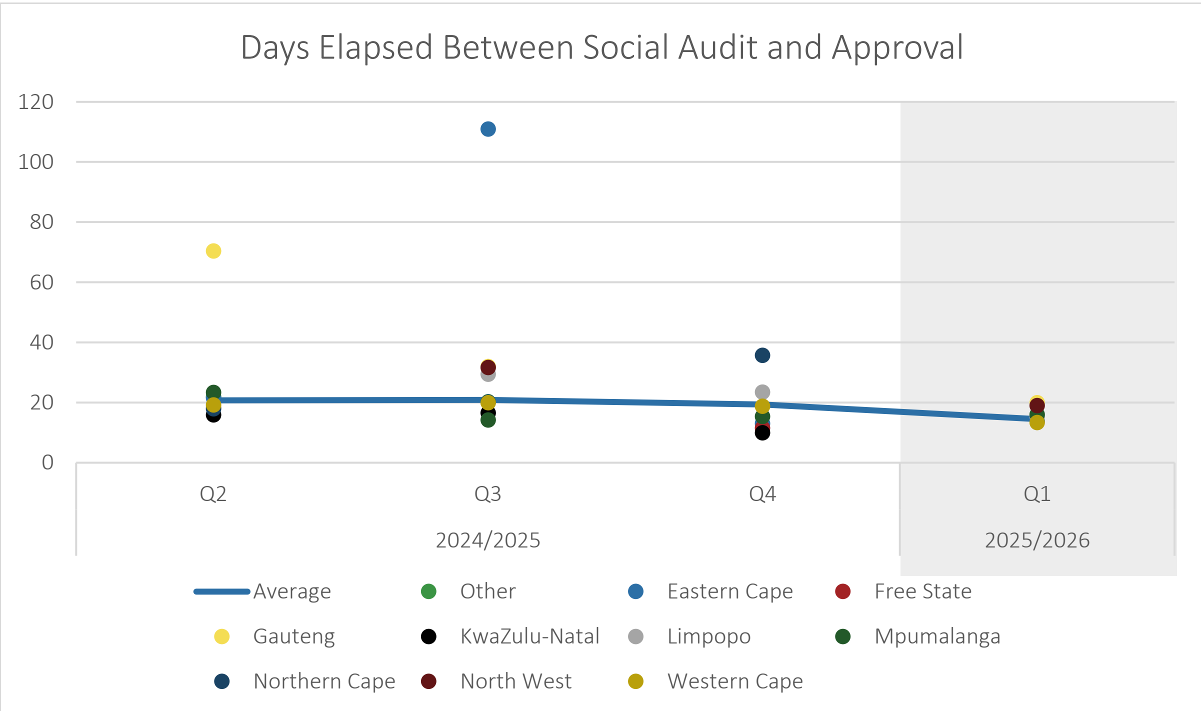
The Western Cape has by-and-large followed the national trend since the 2022/2023 year. Overall, this suggests that the industry, at both a national and provincial level, has an appetite for environmental compliance and is embracing continual improvement promptly. The Western Cape's average days between environmental audit and corrective actions response declined from 97,58 days in Q2 of 2024/2025 to 42,76 days in Q1 of 2025/2026.



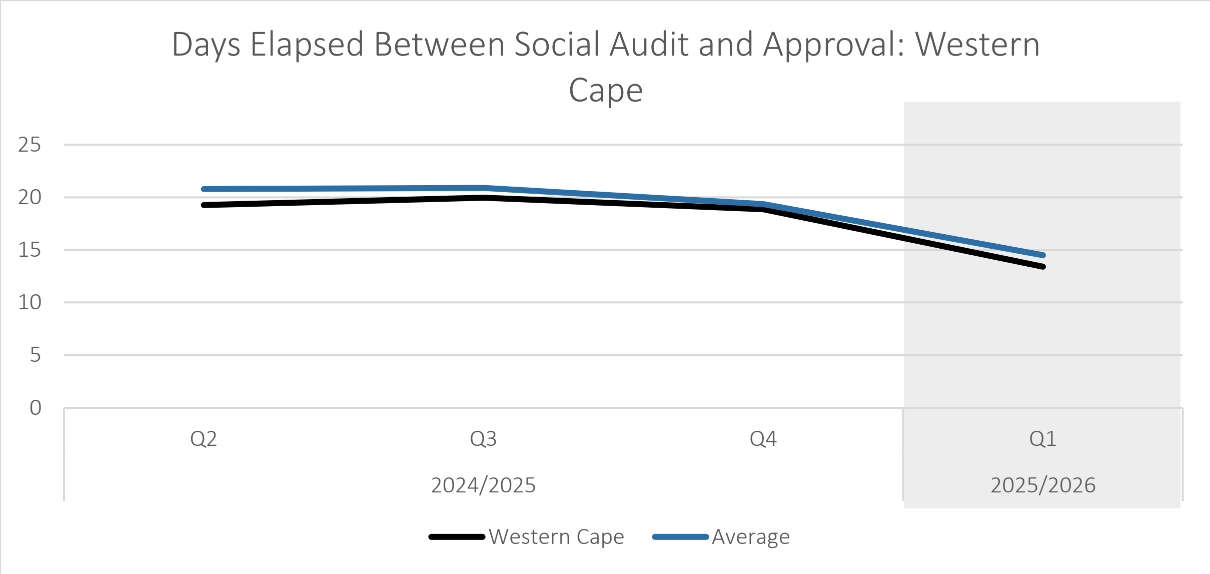
Time Elapsed Before Audit Approval and Completion

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, 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.

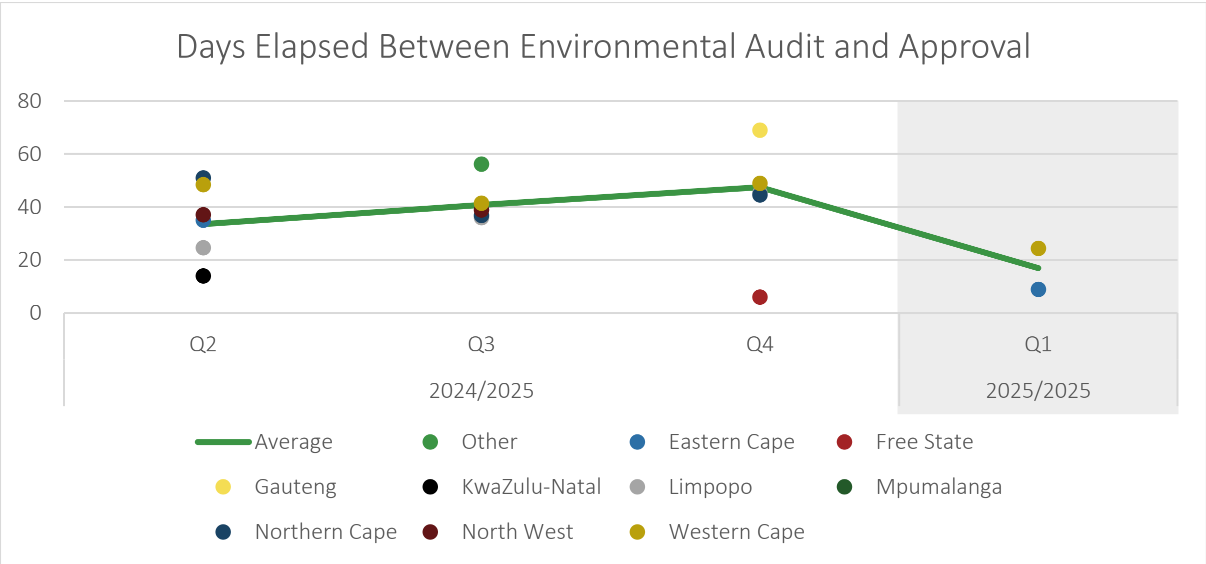
The graph below depicts the number of days elapsed between the Social audit end date and the audit approval date. The average number of days between the end of an audit and its approval declined from 20,79 days in Q2 of 2024/2025 to 14,50 days in Q1 of 2025/2026.



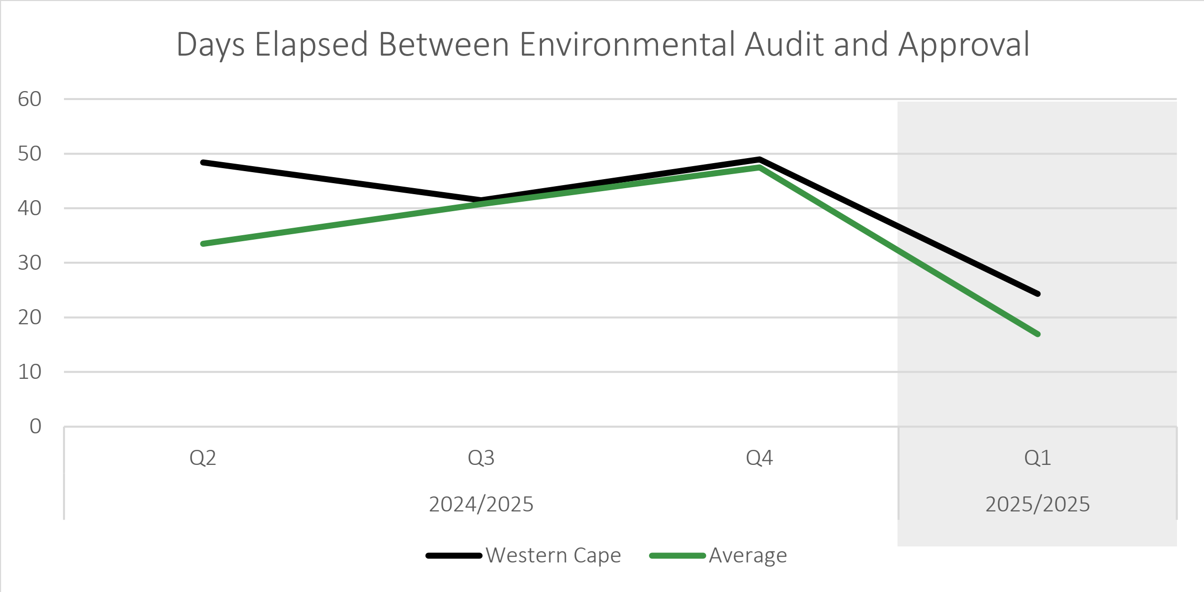
The Western Cape has largely driven the national trend, with the time between social audit and approval declining from an average of 19,26 days in Q2 of 2024/2025 to an average of 13,41 days in Q1 of 2025/2026.



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 generally increased from Q2 (an average of 33,49 days) to Q4 (an average of 47,47 days) of 2024/2025. This declined in Q1 of 2025/2026 to an average of 16,94 days.



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 24,32 days between audit findings and approval in Q1 of 2025/2026.



4.2. Between Audit Monitoring

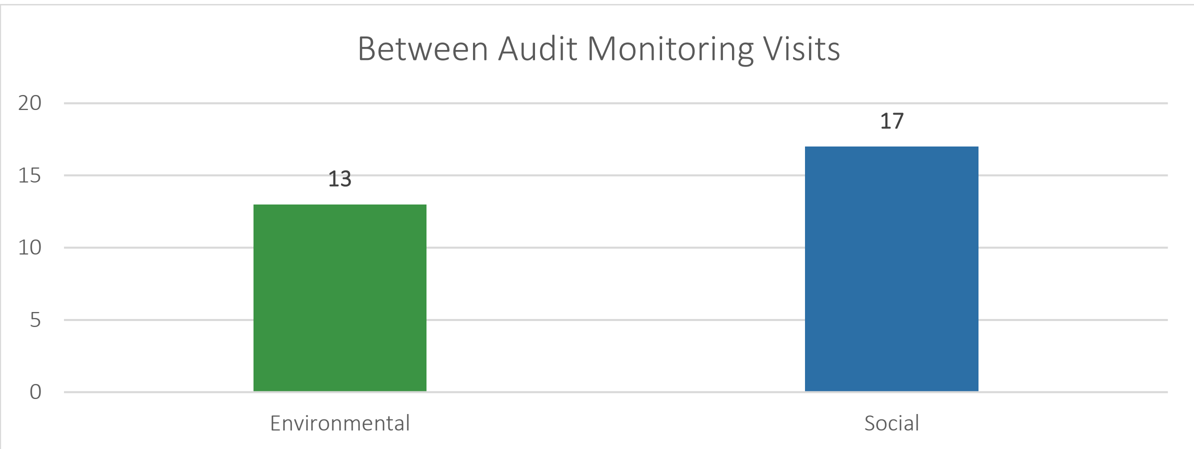
Between Audit Monitoring Programme

As part of the drive for continuous improvement, SIZA launched the social and environmental between audit monitoring programmes, which aim to verify the social and environmental SAQ and assist suppliers with technical support and advice to improve environmental practices in support of the preparation for a third-party audit.

Verifications per Period

Since September 2019, subscribers have had the option to be selected for a SIZA CARES, also known as SIZA CARES (**C**reating **A**wareness and **R**esilience in **E**nvironmental **S**ustainability), between audit monitoring visits as part of a sample-based programme in preparation for their third-party audit. Since 2019, SIZA Sustainability experts have conducted 388 verifications.

In the most recent reporting period, 17 Social and 13 Environmental verifications took place. Of these, 13 Social and 10 Environmental verifications occurred in the Western Cape.



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

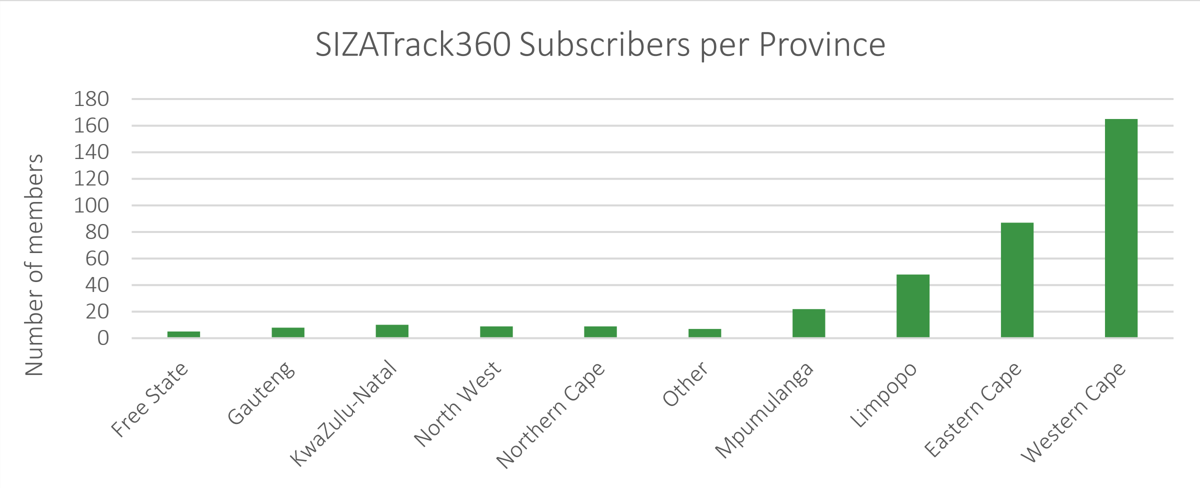
As a supplier in South Africa, staying ahead in the highly competitive agricultural sector requires more than just a green thumb. Credible digital data on compliance is vital for retailers, importers, and buyers because it provides transparency, enables real-time monitoring, manages risks, and facilitates collaboration. The SIZATrack360 programme aids suppliers, packhouses, and processing facilities in tracking 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 agribusiness. The innovative SIZATrack360 Programme enables users to monitor key areas such as production, water use, fuel, fertilisers, chemicals, and waste. It also supports carbon footprint calculations, meeting global buyer requirements because SIZA supplies visibility through the MySIZA Platform and empowers suppliers to evaluate and enhance their management practices.

SIZATrack360 Subscriptions

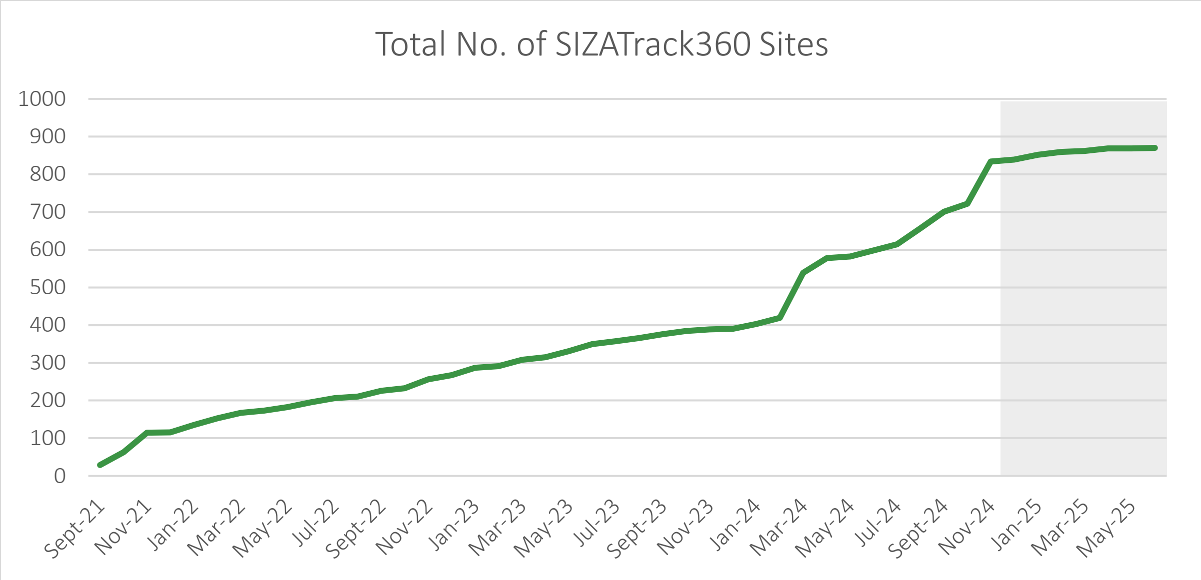
Currently, 380 subscribers, comprising over 870 sites, have already signed up for digital recordkeeping to capture their production inputs online. This makes up approximately 30% of all registered SIZA Environmental subscribers. Primary subscribers who signed up for SIZATrack360 receive training before setting up their profile, as the correct information must be used from the start.

Increasing interest and queries into the SIZATrack360 programme will likely lead to increased 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.

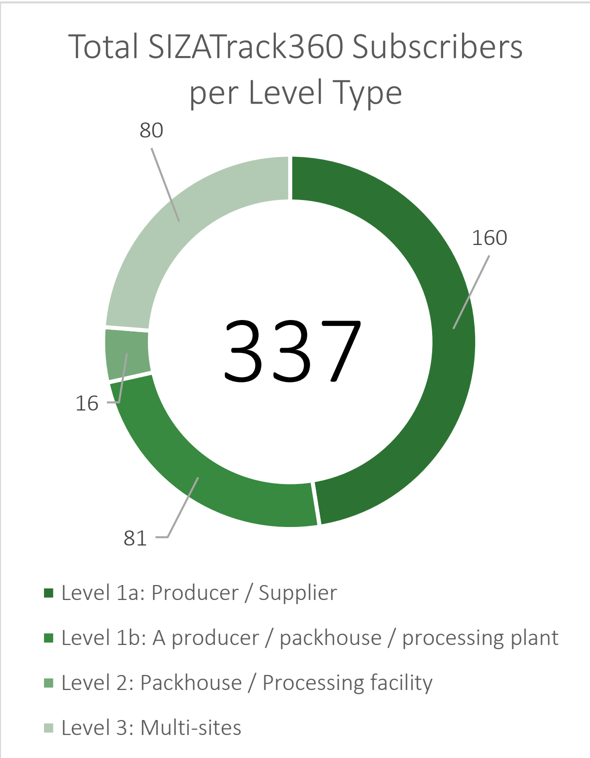


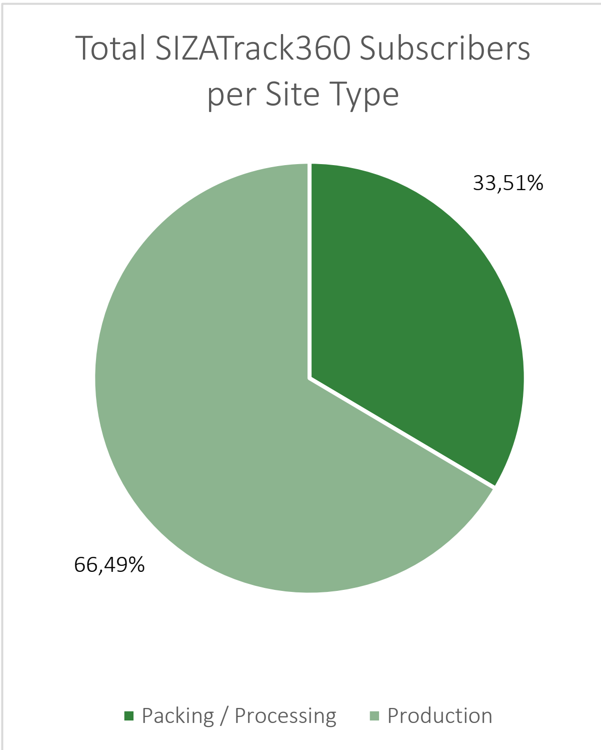
In support of the subscription totals, the SIZATrack360 registrations predominantly come from the Western Cape (44,59%), followed by the Eastern Cape (23,51%) and Limpopo (12,97%) – this is aligned with the provincial distribution of SIZA Environmental subscriptions across South Africa.

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.

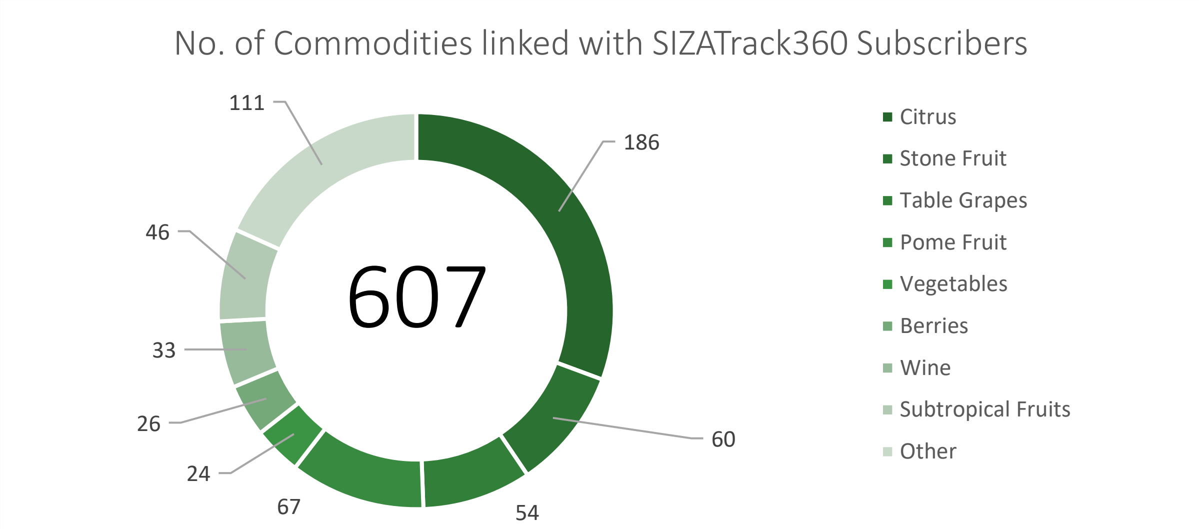


To date, 380 subscribers representing over 870 sites have already signed up for SIZATrack360 to start capturing their production inputs online. Of these, currently 337 primary subscribers are actively capturing data for 367 sites.





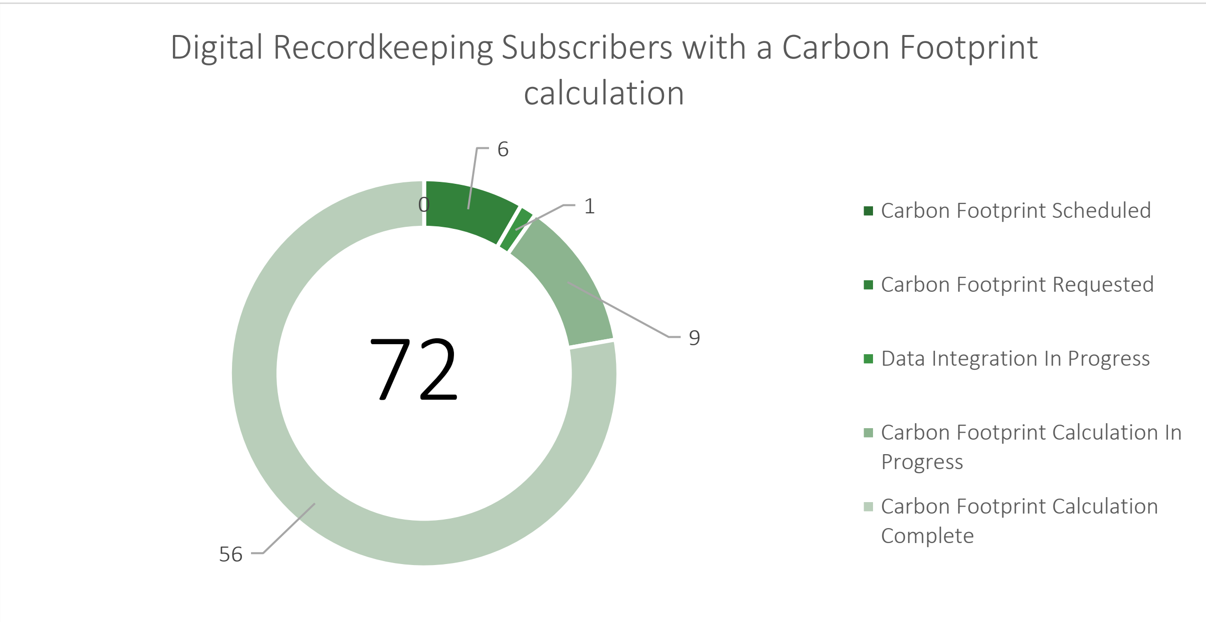
The current breakdown of SIZATrack360 subscribers per site type and per level type is also well-aligned with the site type and level type subscribers distributions of SIZA Environmental subscribers. The main distributions of SIZA Environmental subscribers are producer/supplier subscribers (Level 1a), at 47,48%, followed by producer/packhouse/processing plant Level 1b (24,48%) and multisites (23,74%).



Interestingly, the majority of commodities linked with Digital Recordkeeping subscribers are located within the citrus (30,64%) and pome fruit (11,04%) industries. This pattern is likely due to differing awareness levels of the 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 the Confronting Climate Change (CCC) Initiative. Currently, 72 subscribers have leveraged the integration between SIZA and Confronting Climate Change's (CCC) platforms to request and perform Carbon Footprints. Of these, 56 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 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.

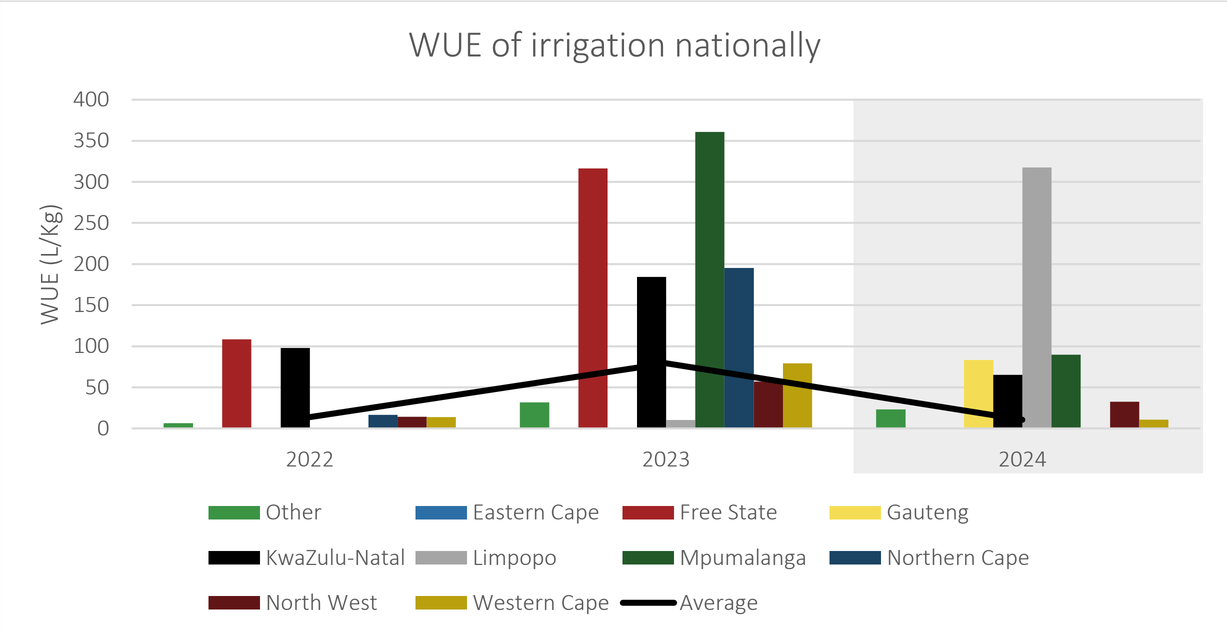


Using data accumulated from subscribers who have completed their carbon footprint calculations, we can start to see interesting trends emerging. ***As more subscribers complete their carbon footprint over multiple years, the average carbon footprint per annum will incorporate seasonal and production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

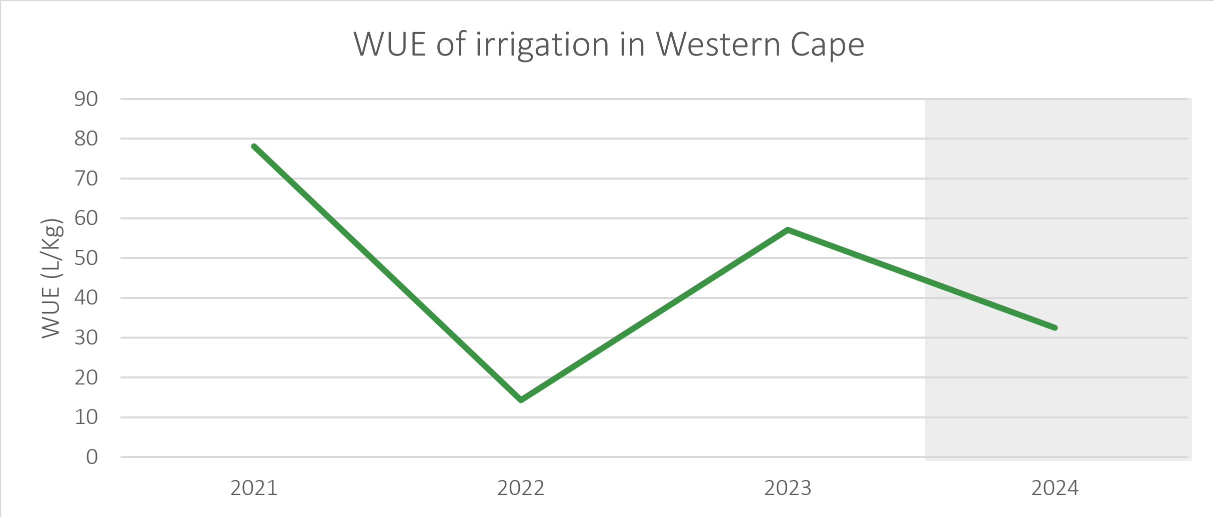
Water-use Efficiency

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 2024. At a national level, the total efficiency of irrigation has improved from an average of 13,92 L/Kg output in 2022 to a value of 10,55 L/Kg in 2024. Reasons behind this improved efficiency vary, but they 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.

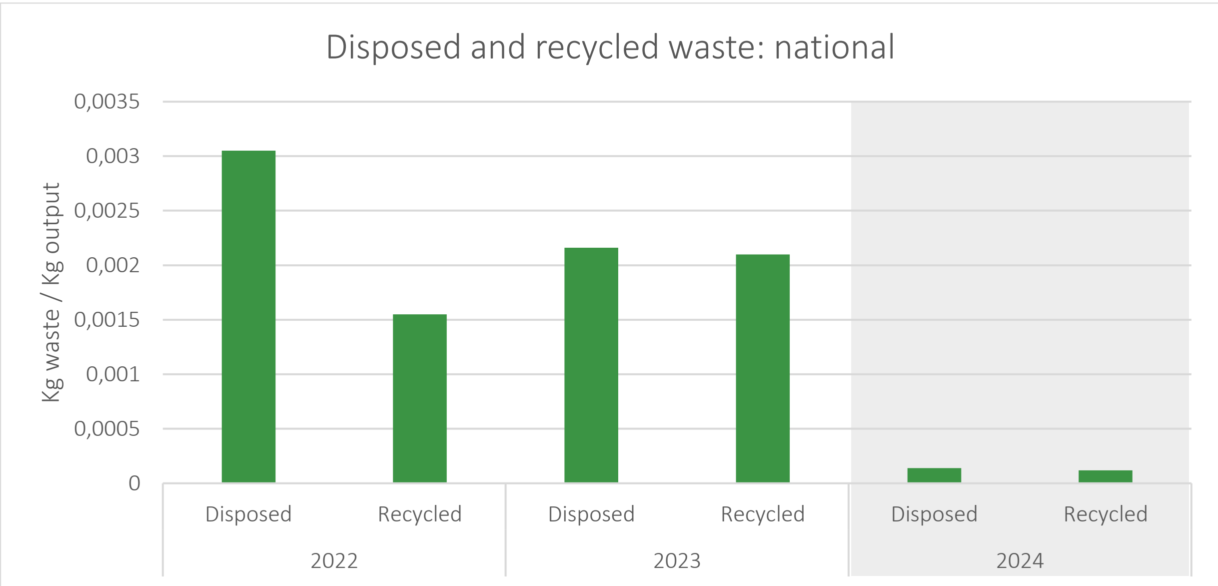


The Western Cape has the richest dataset, allowing for more accurate interpretations of SIZATrack360 data. The graph below depicts a clear trend in the Western Cape of improved WUE since 2021. The drivers behind this improved efficiency include drought and load shedding considerations and their economic implications for suppliers/packhouses. Overall, Western Cape suppliers improved their WUE from an approximate average of 78,1 L/Kg output in 2021 to approximately 32,49 L/Kg in 2024.

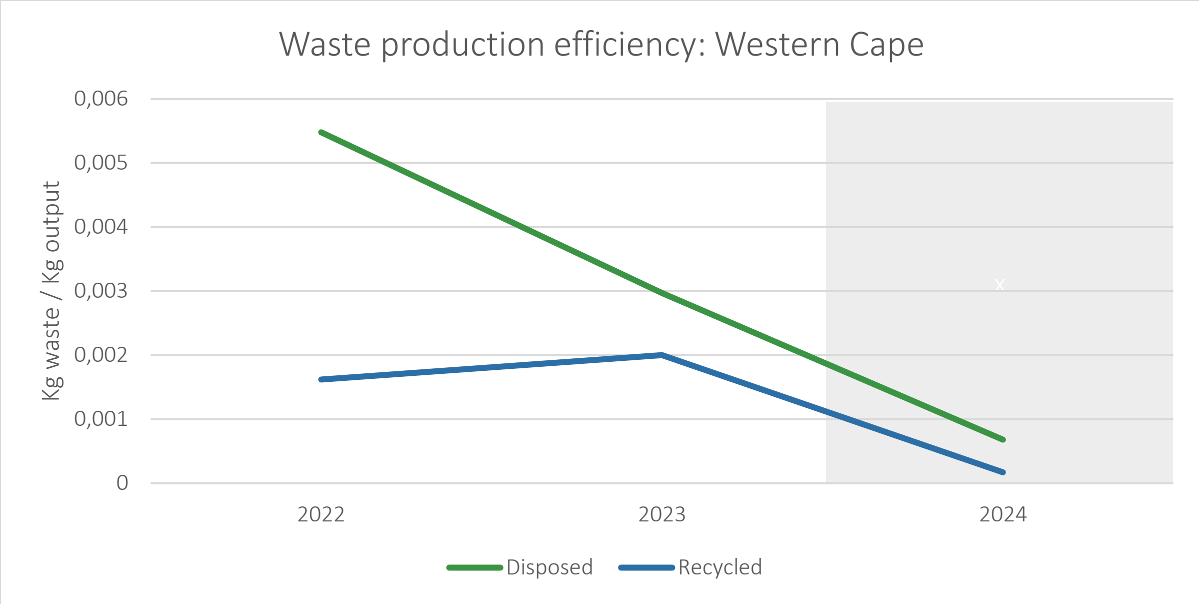


<u>Waste Management</u>

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.



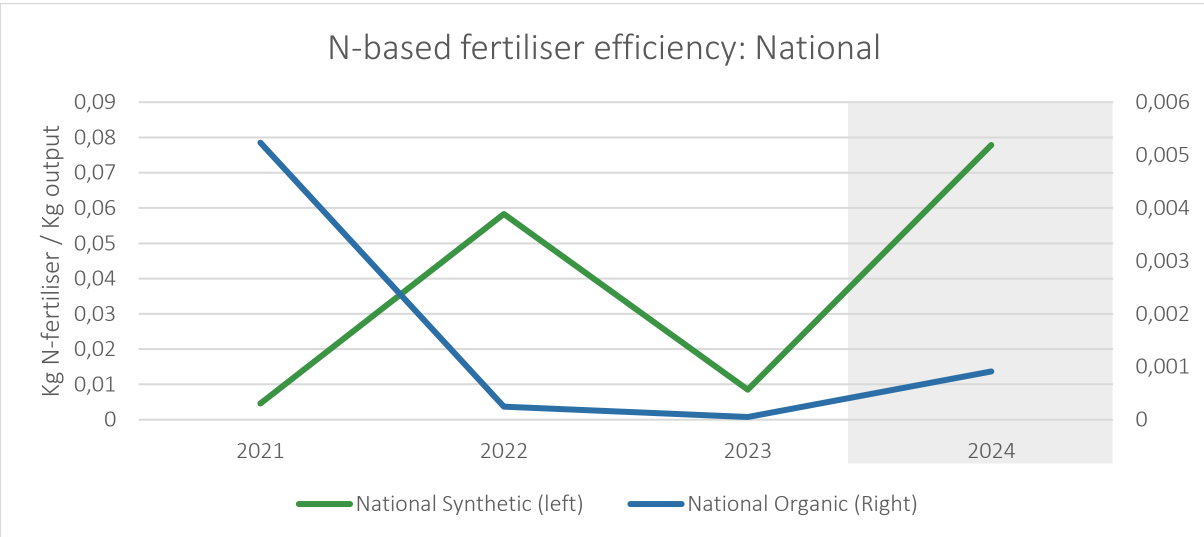
The Western Cape contains sufficient data to conduct a provincial-level analysis. The graph below shows that Western Cape waste production efficiency has improved over time. The efficiency of disposed waste per output has improved from roughly 0,0055 Kg disposed waste/Kg output in 2022 to 0,003 Kg disposed waste/Kg output in 2023, and to 0,0007 Kg disposed waste/Kg output in 2024. The efficiency of recycled waste initially worsened from 0,0016 Kg recycled waste/Kg output in 2022 to 0,002 kg recycled waste/Kg output in 2023. Then it improved significantly to 0,00017 Kg recycled waste/Kg output in 2024. Therefore, the efficiency of recycled waste was initially more than double that of disposed waste in 2021. These efficiencies have nearly equalised in 2023 and 2024, indicating a degree of substitution from disposed waste to recycled waste.



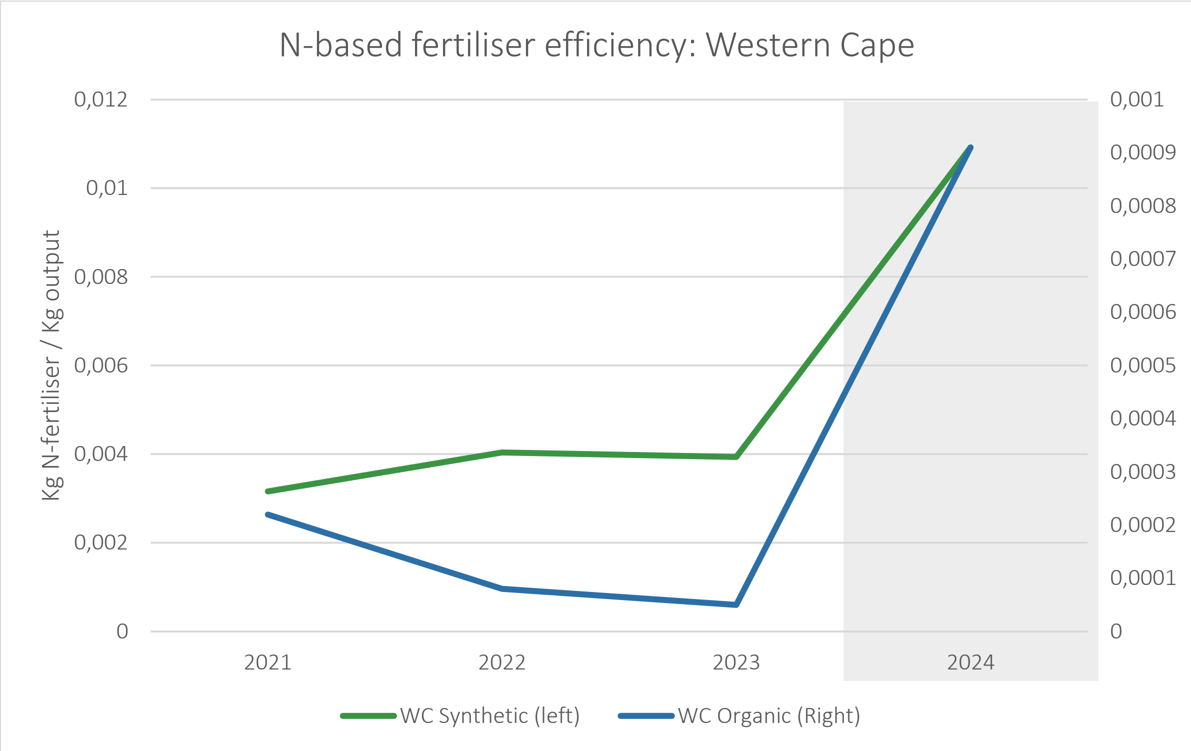
Nitrogen-based Fertiliser Usage

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 2022 to 2024. This graph illustrates that there is a decrease in the efficiency of application of both synthetic nitrogen fertilisers and organic nitrogen-based fertilisers. This suggests that suppliers are applying greater quantities of all nitrogen-based fertilisers nationally. Additionally, with more subscribers capturing data for previous seasons, and improved accuracy of the data capturing process, the decline in the application of both organic and synthetic nitrogen-based fertilisers is likely due to a more accurate representation of nitrogen-based fertiliser application at a national scale.



The graph below depicts nitrogen-fertiliser application for the Western Cape from 2021 to 2024. This graph shows that the efficiency of synthetic nitrogen-based fertilisers has decreased over time. The efficiency of organic nitrogen-based fertiliser initially improved from 2021 to 2023 and then decreased drastically between the 2023 and 2024 seasons. This suggests that farmers in the Western Cape opted for increased organic nitrogen-based fertilisers in 2024.



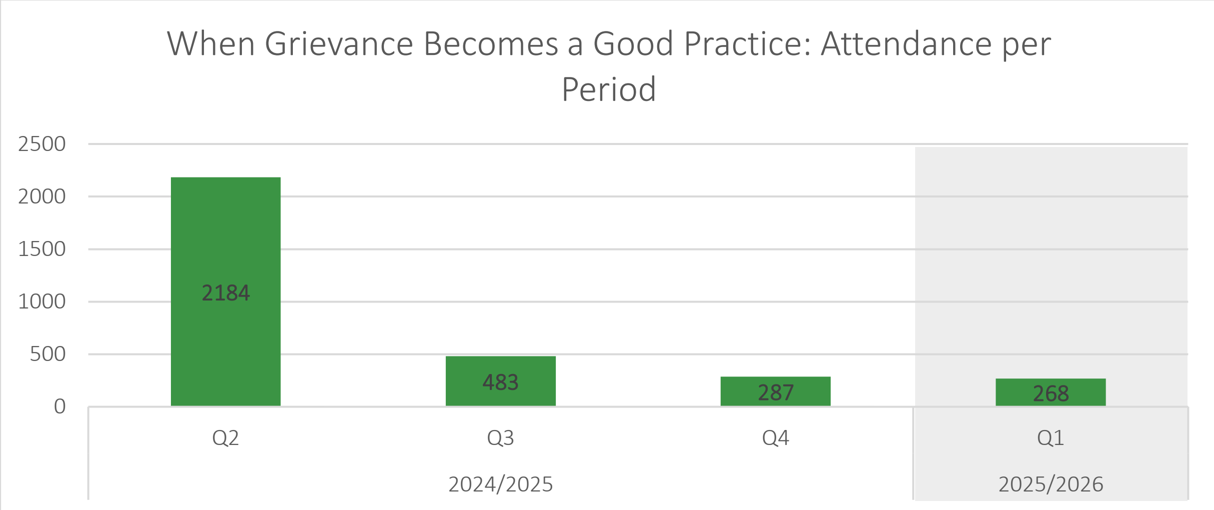
6. SIZA CAPACITY BUILDING INITIATIVES

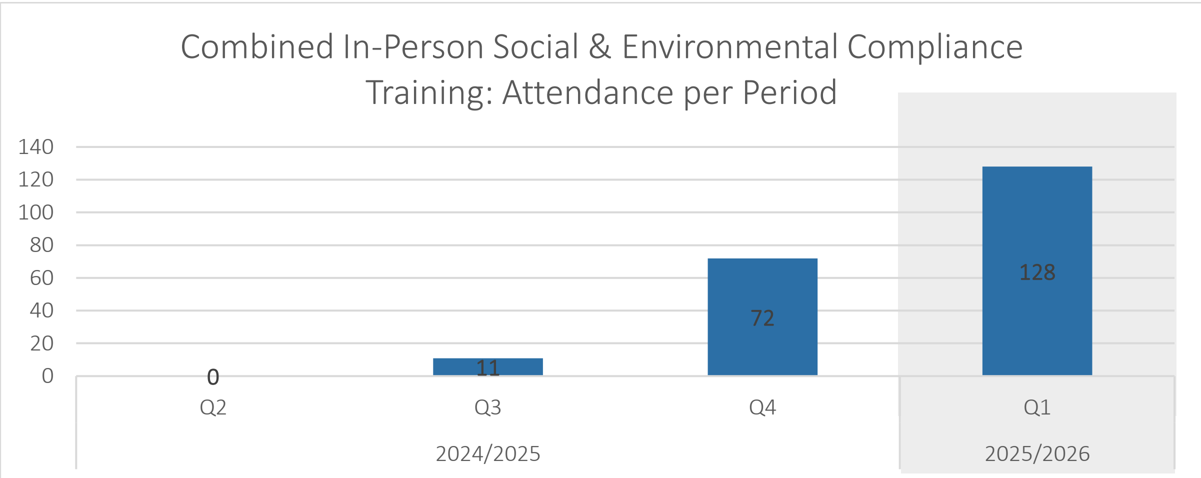
As part of its support programme, SIZA offers a range of in-person and virtual training initiatives, along with practical resources such as videos, posters, legal guides, and templates—all designed to help subscribers navigate their compliance journey, prepare for third-party audits, and deepen their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

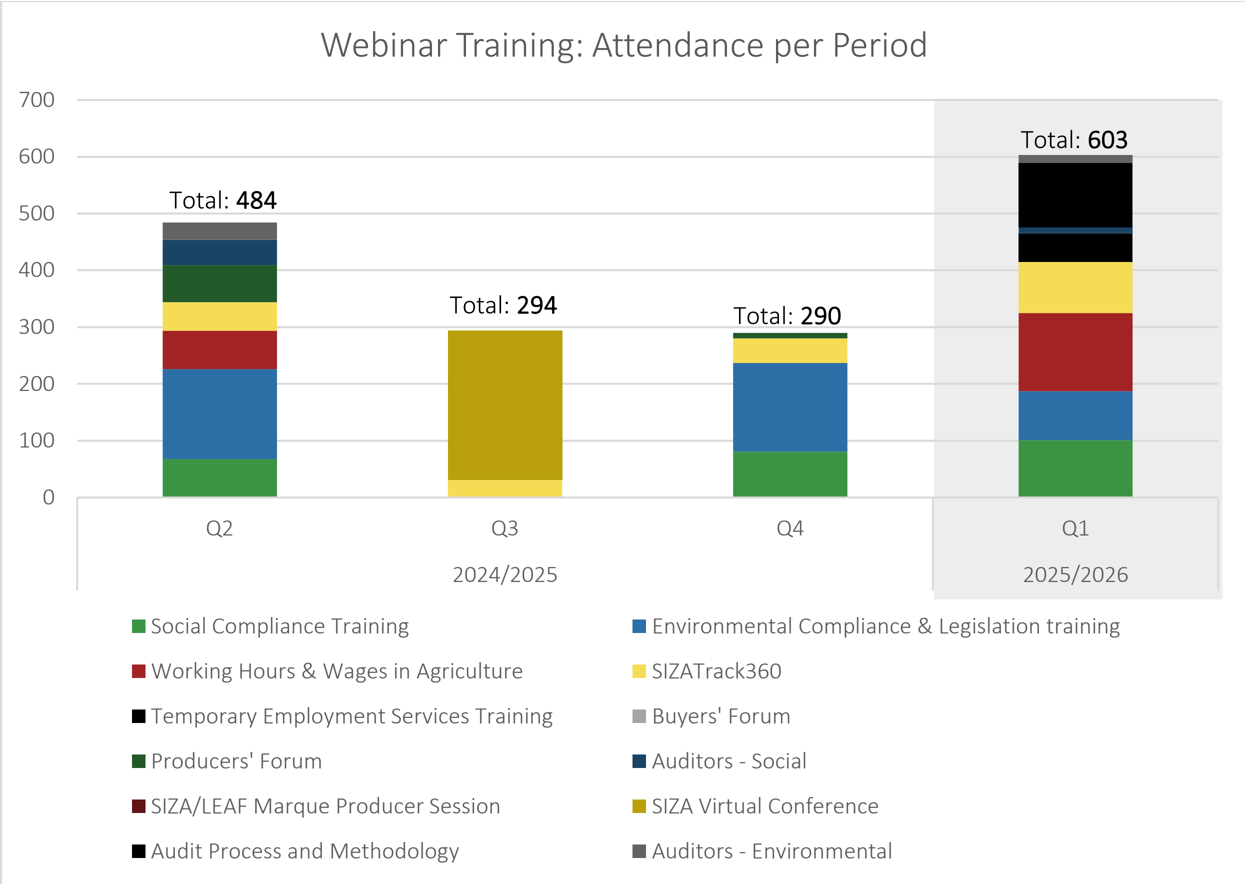
Subscriber training:

- 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 12 training sessions were conducted, including three combined in-person social and environmental compliance training sessions that were attended by 128 individuals and 9 webinar training sessions attended by 603 individuals. Additionally, a total of 18 When Grievance becomes Good Practice training sessions were conducted by PROCARE, a remedy solution programme, with a total attendance of 268 individuals. In total, training sessions were attended by 731 attendees, implying an overall average attendance of 61 attendees per training.







Webinar Training: Attendance per Period
700
600
500
400
300
200
100
0
Total: 484
Total: 294
Total: 290
Total: 603
Q2
Q3
Q4
Q1
2024/2025
2025/2026
Social Compliance Training
Environmental Compliance & Legislation training
Working Hours & Wages in Agriculture
SIZATrack360
Temporary Employment Services Training
Buyers' Forum
Producers' Forum
Auditors - Social
SIZA/LEAF Marque Producer Session
SIZA Virtual Conference
Audit Process and Methodology
Auditors - Environmental