NCM

National Chamber of Milling
South Africa

COMPANY PROFILE

OF THE

NATIONAL CHAMBER OF MILLING

NATIONAL CHAMBEROF MILLING (NCM)

The NCM is a dynamic and influential **non-profit organization representing the South African wheat and maize milling industry.**

Membership is voluntary and currently comprised of organizations actively and **directly involved in commercial wheat (almost 70% of milled capacity)** and white maize milling markets.

The membership base of the NCM is a core reason for its existence. As such, the activities of the organization are directed at addressing the **best interest of members** and adding value to their business.

The object of the Company is to represent, promote and advance the interest of wheat, maize and other grain milling industries in general.

1. VISION

To be the foremost organization in serving the interests of Grain Millers and their key stakeholders throughout Sub Saharan Africa.

1. MISSION

The **NCM is a dynamic industry mouth-piece for the milling industry** that:

a) Promote and advance the industry interests and views to government and its entities, parliamentarians, regulators, media, industry value chain stakeholders as well as all other interested parties;
b) Improve the nature and understanding of operational requirements of the wheat, maize and other grain milling operations to the benefit of members and that of the society at large;
c) Provide training resources, knowledge and advice to its members and other stakeholders on a wide range of issues affecting the milling industry;
d) Provide institutional capacity with respect to trade, technical, legislative and policy frameworks that affect the milling industry environment; and
e) Be a fully fledged representative body for the milling industry

To this extent, the NCM is a sole representative body of wheat and maize millers contributing towards:

a) Delivery of efficiently produced, high quality safe staple food for the consumers;
b) Attainment of other national objectives such as the country's economic growth and development, Food Security, Job Creation, transformation, etc; and
c) Creation of conducive environment for the milling industry to flourish, expand and be competitive.

1. KEY FOCUS AREAS

a) Strategic engagement with various stakeholders
b) Industry representation and mouth-piece
c) Provide institutional capacity to various government departments, industry value chain as well as relevant institutions
d) Expand knowledge base network and provide high quality and sustainable industry training
e) Address industry issues relating to trade policies as well as technical and regulatory affairs.

Supply and demand estimates of wheat in South Africa

(1000 tons)

	2015/16	2016/17	2017/18	2018/19	2019/20
	CEC Final	CEC Final	CEC Final	CEC Final	CEC Feb
Opening stocks (1 Oct.)	**597**	**827**	**341**	**721**	539
Total Acquisition	**3 470**	**2 806**	**3 724**	**3 215**	**3 502**
Producer deliveries	*1 407*	*1 871*	*1 547*	*1 847*	*1 502*
Human wheat	*1 399*	*1 860*	*1 538*	*1 836*	*1 493*
Feed wheat	*8*	*11*	*9*	*11*	*9*
Imports destined RSA	***2 063***	***935***	***2 177***	***1 368***	***2 000***
Total Consumption	**3 168**	**3 187**	**3 230**	**3 268**	**3 290**
Human consumption	*3 142*	*3161*	*3208*	*3251*	*3250*
Animal feed	*0*	*3*	*3*	*3*	*23*
Other*	*26*	*23*	*19*	*14*	*18*
Total Exports to Africa	**72**	**105**	**114**	**129**	**120**
Products	*15*	*12*	*38*	*21*	*40*
Whole wheat	*57*	*93*	*76*	*108*	*80*
Ending stocks (30 Sept.)	**827**	**341**	**721**	**539**	**631**
8 weeks com. demand	-483	-486	-494	-500	-500
Surplus / (shortage)	**343**	**- 145**	**228**	**39**	**131**
Hectares	**482**	508	492	503	540
Yield	**2.92**	**3.68**	**3.15**	**3.67**	**2.78**

South African wheat imports from various countries (%)

	16/17	17/18	18/19	19/20	20/21	21/22
US	3.7	4.0	10.3	3.5	2.5	1.3
Australian	2.5	-	-	-	32.6	10.6
Argentine	4.3	6.1	2.6	-	-	25.5
German	28.4	13.0	25.4	16.2	3.7	-
Ukraine	-	6.2	3.7	3.2	0.5	-
Canadian	3.3	4.2	6.3	3.1	9.7	-
Brazilian	-	-	-	-	-	18.1
Poland	9.2	0.8	1.8	32.8	15.8	10.7
Lithuania	-	8.4	9.2	12.3	17.7	28.0
Uruguay	-	-	-	-	-	-
Russia	22.1	44.0	29.6	21.1	11.5	-
Romanian	9.2	4.8	-	-	-	-
Latvia	-	6.4	2.9	3.3	5.3	5.8
Czech Rep	17.3	2.1	8.2	3.2	0.7	-
Finland				1.3	-	-
Total (%)	100.0	100.0	100.0	100.0	100.0	100.0

Primarily pan loaf bread market – mostly 700 grams

This is to certify that we, CIS Commodity Inspection Services, GAFTA approved superintendent, have inspected a consignment said to be **RUSSIAN MILLING WHEAT IN BULK** during loading on board of the seagoing vessel **M/V "SOCRATIS"** at the port of Taman, Russia between 15-08-2021 and 18-08-2021.

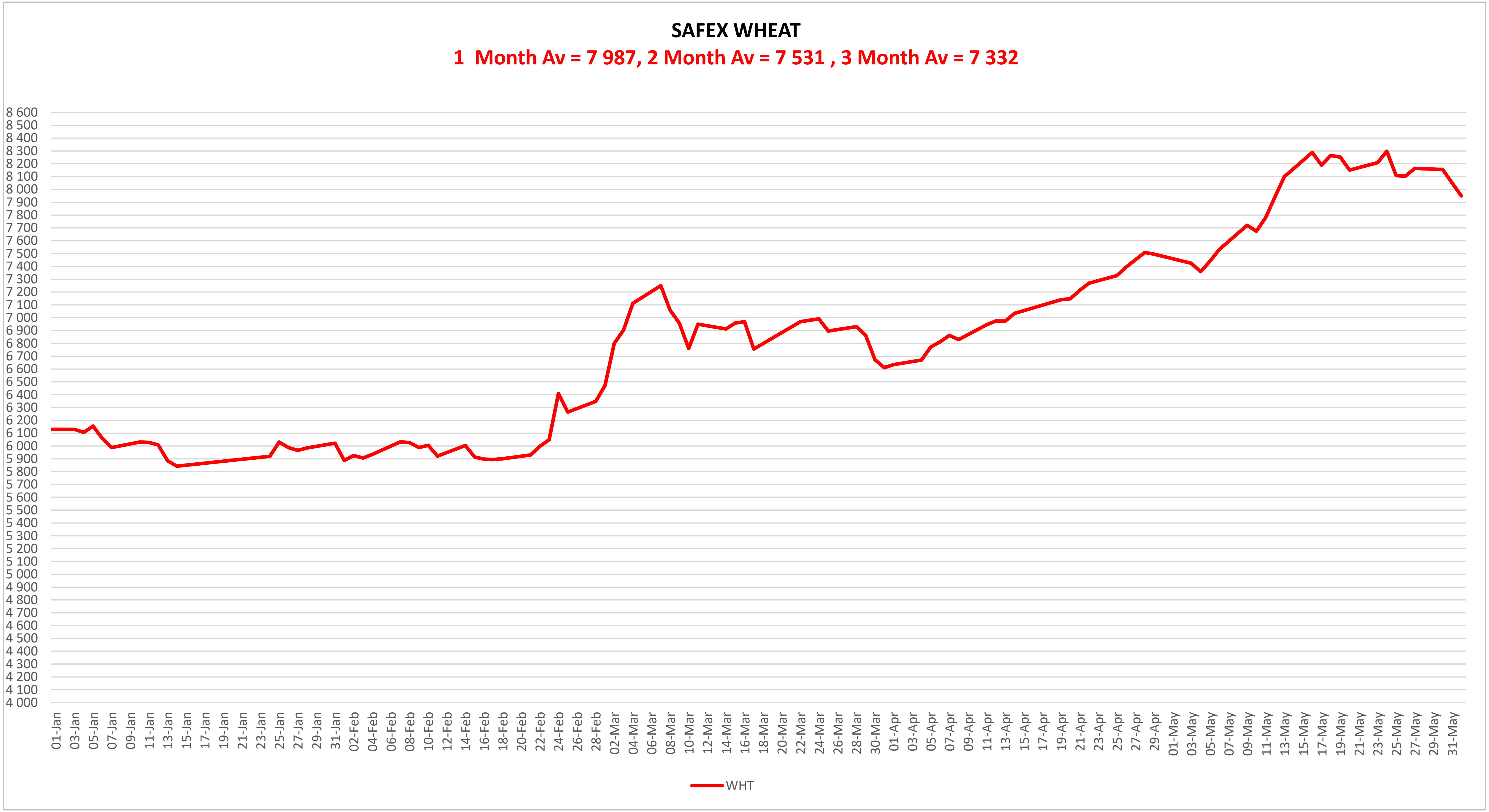
The inspection revealed following results:

Port of loading	:	Taman, Russia
Port of discharge	:	Durban, South Africa
Description of goods	:	Russian Milling wheat in bulk
Weight	:	50 450,000 mt as per B/L no. 1 dated 18-08-2021
Stowage	:	in hold no. 1, 2, 3, 4 & 5
Sampling	:	samples of the above referenced cargo were properly collected by our inspectors all along the entire loading operations. Upon completion of loading all withdrawals have been carefully mixed and quartered down to reference composite samples. One composite sample was submitted to a neutral laboratory for analysis. Sampling has been conducted as per the GAFTA 124 rules.
Quality	:	analysis conducted by a neutral laboratory revealed the following results:

Parameters	Specifications	Results	Method
Protein	Min 12.5%	12.6%	ISO 20483
Moisture	Max 14%	10.6%	ISO 712
Test Weight	Min 77 kg/hl	77.2 kg/hl	ISO 7971-3
Falling Number	Min 250s	426s	ISO 3093
Wet Gluten	Min 25%	25.9%	ISO 21415-2
Foreign Matter	Max 2%	0.60%	GAFTA 26.2(1)
W	Min 180	215	ISO 27971
Screenings	Max 4% (1.8 mm sieve)	3.24%	South-African Agricultural Product Standards Act 119 of 1990
Bug Damage	Max 1%	0.25%	ISO 7970(2)

[1] includes extraneous matter, harmful seeds, bunted grains and ergot as per ISO 7970

[2] fraction of 'attacked by pests' as per ISO 7970


SAFEX WHEAT
1 Month Av = 7 987, 2 Month Av = 7 531 , 3 Month Av = 7 332
WHT

World Wheat Production

Country or Region	2021/2022 Estimate	2021/2022 Change from April 8	2022/2023 Forecast	2022/2023 Change from 2021/2022
	Million Tons			
World	779.3	0.5	774.8	-4.5
United States	44.8	--	47.0	2.3
Foreign	734.5	0.5	727.8	-6.7
Argentina	22.2	1.2	20.0	-2.2
Canada	21.7	--	33.0	11.3
Australia	36.3	--	30.0	-6.3
European Union	138.4	--	136.5	-1.9
Turkey	16.0	-0.2	17.5	1.5
Russia	75.2	--	80.0	4.8
Ukraine	33.0	**	21.5	-11.5
Kazakhstan	11.8	--	13.0	1.2
China	136.9	--	135.0	-1.9
India	109.6	--	108.5	-1.1
Northwest Africa	11.2	-1.2	7.2	-4.0

World Wheat Supply and Use

Item	2021/2022 Estimate	2021/2022 Change from April 8	2022/2023 Forecast	2022/2023 Change from 2021/2022
	Million Tons			
Beginning stocks	291.2	0.6	279.7	-11.5
Production	779.3	0.5	774.8	-4.5
Total Supply	1,070.5	1.0	1,054.5	-16.0
Feed use	161.0	-1.2	153.5	-7.5
Total use	790.8	-0.3	787.5	-3.3
Trade	199.9	-0.2	204.9	5.0
Ending Stocks	279.7	1.3	267.0	-12.7