

POTATOES SA

PILLARS OF PROGRESS 2026

SUSTAINABILITY AND
ENVIRONMENTAL
STEWARDSHIP

PRODUCTION AND
MANAGEMENT

INNOVATION AND
TECHNOLOGY
ADVANCEMENT

REGULATORY
FRAMEWORK AND
POLICY ADVOCACY

LOGISTICS

SOCIAL INCLUSION
AND COMMUNITY
DEVELOPMENT

ECONOMIC GROWTH
AND MARKET
EXPANSION

PILLARS OF PROGRESS



Potatoes South Africa (PSA) aims to ensure an innovative, and sustainable potato industry that meets the evolving needs of our society and environment. Our vision for 2050 is centered around enhancing industry growth, promoting sustainability, and advancing technology to secure a prosperous future for the potato sector. By 2050, Potatoes South Africa envisions a thriving potato industry that is globally competitive, environmentally sustainable, and socially inclusive. We aim to lead in innovation, quality, and efficiency while fostering a resilient industry that supports economic growth, food security, and environmental stewardship. By focusing on sustainability, innovation, economic growth, social inclusion, and supportive policies, we aim to build a resilient and prosperous potato industry that benefits all stakeholders and remain at the forefront of global potato production.

#1: SUSTAINABILITY AND ENVIRONMENTAL STEWARDSHIP

Our objective is to promote sustainable farming practices and minimize the environmental impact of potato production.

SUSTAINABLE FARMING PRACTICES

CLIMATE RESILIENCE

RESOURCE EFFICIENCY

TRANSPARENCY

#7: PRODUCTION AND MANAGEMENT

The objective is to produce more on less land with the least possible environmental impact. Innovative thinking and the use of new technologies will be key. Producing new cultivars faster, identifying new diseases earlier, managing production better and increasing sustainability are the challenges. Regenerative agricultural principles are important for sustainability in yields, carbon capture, reduction of emissions, promotion of biodiversity and improvement of soil health and water usage.

IDENTIFY CHALLENGES AND RISKS

PLANNING

WATER MANAGEMENT

TECHNOLOGY

FERTILIZATION AND DISEASE CONTROL

#2: INNOVATION AND TECHNOLOGY ADVANCEMENT

The objective is to foster innovation and integrate advanced technologies to enhance productivity and efficiency. The industry will experience increased scarcity of resources, which should create a sense of urgency to shift perspective towards finding novel ways to face challenges. Investment in technology such as genome editing is paramount.

RESEARCH AND DEVELOPMENT

TECHNOLOGY ADOPTION

DIGITAL PLATFORMS

DEGLOBALISATION

#5: REGULATORY FRAMEWORK AND POLICY ADVOCACY

The objective is to ensure a supportive and risk appropriate regulatory environment and advocate for policies that benefit the potato industry.

POLICY DEVELOPMENT

ADVOCACY

RESOURCE ALLOCATION

MONITOR PROGRESS

COMPLIANCE AND
STANDARDS

STAKEHOLDER
ENGAGEMENT

#6: LOGISTICS

The objective is to optimise logistics through innovative initiatives that mitigate environmental impacts, enhance efficiencies, increase value and optimising an interconnected ecosystem to unlock value.

HOLISTIC SOLUTIONS

OPTIMISING TRANSPORT

SHELF LIFE AND PRICING

INEFFICIENCIES

SUPPLY CHAIN
DIVERSIFICATION

#4: SOCIAL INCLUSION AND COMMUNITY DEVELOPMENT

The objective is to promote inclusivity and enhance the social impact of the potato industry.

PRODUCER EDUCATION
AND TRAINING

COMMUNITY ENGAGEMENT

#3: ECONOMIC GROWTH AND MARKET EXPANSION

The objective is to strengthen the economic viability of the potato industry and explore new market opportunities.

VALUE CHAIN
DEVELOPMENT

MARKET DIVERSIFICATION

PRODUCER SUPPORT

#1: Production and climate-smart farming: Are we ready?

A major theme at the 2026 Potatoes SA Congress and Seed Potato Growers' Forum was how prepared the South African potato industry is for an increasingly variable climate. The congress explored the technical interventions required to maintain productivity, profitability, and resource-use efficiency under changing environmental conditions. Discussions focused on climate risk, crop genetics, soil health, water management, production resilience, and innovation's role in adapting potato production systems to future conditions.



Climate variability

Climate change is no longer a future risk; it is already affecting production environments through increased temperature variability, changing rainfall patterns, more frequent droughts, extreme weather events, and shifting disease and pest pressures. These factors create greater uncertainty for producers and increase the complexity of production planning. The industry therefore faces the challenge of maintaining stable yields while managing a growing range of environmental risks.

Climate adaptation requires a systems-based approach rather than isolated interventions. Successful adaptation depends on interactions among genetics, soil health, water management, agronomic practices, and producer decision-making. Individual technologies can contribute to resilience, but their effectiveness increases significantly when implemented as part of integrated production systems.

Plant variety development

Developing cultivars that perform under increasingly variable conditions is expected to become one of the industry's most important adaptation tools. Future breeding objectives are likely to place greater emphasis on drought tolerance, heat tolerance, disease resistance and improved water-use efficiency, while continuing to meet market

requirements for yield, quality and processing characteristics.

Genetic improvement can only deliver its full value when matched to appropriate production environments. Variety selection should therefore be based not only on yield potential but also on adaptability, resilience and risk management considerations. As climate conditions become more unpredictable, producers may increasingly evaluate cultivars according to their ability to maintain stable performance under stress rather than their maximum performance under ideal conditions.

Seed and soil quality

High-quality planting material directly influences crop establishment, uniformity, vigour, and ultimate yield potential. Poor-quality seed increases production risk, particularly under environmental stress conditions where the crop's capacity for recovery may already be compromised. The discussion indicated that investments in seed quality should be viewed as risk mitigation measures rather than merely input costs.

Healthy soils are foundational assets in resilient production systems. Soil structure, organic matter content, biological activity and nutrient availability all influence a crop's ability to tolerate environmental stress. Soils with higher organic matter levels

generally have improved water-holding capacity, greater resilience to heavy rainfall events and better support for root development.

Healthy microbial communities contribute to nutrient cycling, soil aggregation and overall soil function. Maintaining biological activity through appropriate management practices may improve long-term productivity while enhancing resilience to climate-related stress factors.

Water management

Increasing competition for water resources, changing rainfall patterns and the possibility of more frequent droughts place greater pressure on producers to optimise irrigation efficiency. Future competitiveness will depend increasingly on the industry's ability to produce more output with limited water resources.

Efficient irrigation scheduling, improved monitoring systems and better understanding of crop water requirements are important tools for addressing these challenges. Technology is enabling producers to make more informed decisions regarding irrigation timing and quantity, reducing waste while maintaining production objectives. However, technology alone is insufficient without proper interpretation and management.

Understanding water availability at both the farm and regional levels

is crucial. Long-term planning should consider not only current water supplies but also future availability under different climate scenarios. This requires producers to adopt a proactive rather than reactive approach to water management.

Conservation practices

Cover crops can improve soil structure, increase organic matter, enhance water infiltration, and reduce erosion. They may also support broader ecosystem functions that enable sustainable production.

Cover crops should not be viewed as a stand-alone intervention but as one component of an integrated soil health strategy. Benefits accumulate over time and are most significant when cover cropping is combined with broader conservation agriculture principles. While implementation strategies may differ between regions and production systems, the overarching objective remains the same: improving the soil's capacity to support productive crops while reducing vulnerability to climatic stress.

Technology and innovation

Advances in data collection, monitoring and decision-support

tools are creating new opportunities for producers to manage risk more effectively. Improved access to information allows producers to respond more rapidly to changing conditions and make better-informed management decisions.

Precision agriculture technologies are increasingly capable of identifying variability within fields and enabling targeted interventions. Such technologies may help producers optimise inputs, improve resource-use efficiency, and reduce production costs. Their role is likely to grow as margins tighten and environmental pressures intensify.

Despite the potential benefits of technology, practical implementation remains crucial. Producers require solutions that are economically viable, operationally feasible, and capable of delivering measurable value under commercial farming conditions. Adoption therefore depends not only on technical performance but also on affordability, ease of use and return on investment.

Climate adaptation

Sustainability and profitability are interconnected outcomes rather than competing objectives. Production

systems that improve resource efficiency, reduce risk, and maintain long-term productivity are also more likely to remain economically viable.

This perspective represents an important shift in thinking. Climate adaptation is often discussed in environmental terms, yet it has direct commercial relevance. Investments in soil health, water efficiency, improved genetics, and adaptive management practices should be viewed through the lens of risk reduction, production stability, and financial sustainability.

Flexible production

Historic production assumptions may become less reliable as environmental conditions change. Producers must therefore be able to adjust planting dates, variety choices, irrigation strategies, and management practices according to prevailing conditions.

Adaptability is a key characteristic of successful future farming operations. Producers who can respond quickly to changing circumstances are likely to be better positioned to manage risk and capture opportunities. This requires both access to information and the willingness to modify traditional approaches when necessary.

TAKE-HOME MESSAGES

- Climate resilience should become a central planning consideration for the potato industry.
- Rather than viewing climate adaptation as a specialised or secondary activity, it should be integrated into variety development, production planning, resource management and investment decisions.
- Collaboration among researchers, industry organisations, input suppliers, and producers is essential to achieve this objective.
- Industry-wide knowledge sharing, research investment and technology transfer will remain important drivers of future resilience.
- There is a growing emphasis on climate-resilient genetics, increased attention to soil health as a productivity asset, water-use efficiency, expanding use of precision agriculture technologies, and a shift toward integrated risk-management strategies.
- Future potato production systems will become increasingly data-driven, resource-efficient, and resilience-focused.
- Climate readiness is not defined by a single technology or practice but by multiple interconnected decisions that strengthen the overall production system.
- Long-term competitiveness will depend on the industry's ability to improve resilience while maintaining productivity, quality, and profitability.
- The key strategic implication for the South African potato industry is that adaptation must become a continuous process of innovation, learning and system optimisation rather than a once-off response to climate-related challenges.

#2: Soil health and plant nutrition

The increasingly important role of soil health and plant nutrition in sustaining potato productivity under changing environmental, economic and agronomic conditions was top of mind during the 2026 Potatoes SA Congress and Seed Grower's Forum. Discussions focused on the relationship between soil functionality, biological activity, nutrient availability, water-use efficiency and long-term production resilience. A consistent theme throughout the session was the need to move beyond conventional fertiliser-based approaches and adopt a more integrated understanding of soil as a living production system that directly influences crop performance, profitability and sustainability.



Soil health

Soil health is a foundational production asset, not simply a medium for growing crops. Productive potato systems depend on interactions among the soil's physical, chemical, and biological components. When these components work together effectively, they support improved root development, nutrient cycling, water retention, and overall crop performance. Poor soil function, by contrast, increases production risk and limits the effectiveness of all other agronomic interventions.

Organic matter contributes directly to soil structure, water-holding capacity, nutrient retention, and biological activity. Increasing organic matter levels improves the soil's ability to buffer environmental fluctuations and support crops during periods of stress. The discussion reinforced the view that soil organic matter should be managed as a strategic asset that builds value over time and supports both productivity and resilience.

Biological components

Soil micro-organisms drive numerous processes that influence

crop performance, including nutrient cycling, organic matter decomposition, root interactions, and soil aggregation. Healthy microbial populations contribute to a more active and efficient soil ecosystem, creating conditions that support sustained crop growth. The session emphasised that biological processes should not be viewed as supplementary to conventional agronomy but as central contributors to long-term soil function.

Conservation agriculture practices minimise soil disturbance, increase organic matter inputs, and maintain living roots in the soil for longer periods and are important tools for improving soil health. These approaches support the restoration of soil functionality and may improve resilience to environmental stress, particularly under increasingly variable climate conditions.

Cover crops

The benefits of cover crops include improved soil structure, increased biological activity, enhanced water infiltration, and reduced erosion risk. Cover crops also contribute organic matter and can support

nutrient cycling within production systems. Their value extends beyond immediate agronomic outcomes and forms part of a broader strategy to strengthen long-term soil health.

Nutrient management

Approach crop nutrient management through the lens of efficiency rather than application volume. Rising fertiliser costs and increasing pressure on production margins require producers to maximise the return derived from every nutrient applied. The focus therefore shifts toward optimising nutrient availability, uptake and utilisation throughout the crop cycle. Nutrient-use efficiency is becoming an increasingly important performance indicator in modern production systems.

Balanced nutrition is a critical requirement for maintaining crop performance. Crops require a range of nutrients in appropriate proportions, and deficiencies or imbalances can affect growth, physiological function and yield even when overall fertiliser applications appear adequate. Effective nutrition programmes therefore require

an understanding of nutrient interactions and crop requirements throughout different growth stages.

Data-driven precision

Soil analysis remains one of the most valuable tools producers have for understanding fertility status and identifying constraints. However, soil testing is only as effective as the interpretation and implementation of the results. Data should support targeted management decisions that address specific production challenges rather than being collected without clear operational objectives.

Soil properties can vary significantly within a single farming operation, affecting nutrient availability, moisture retention and yield potential. Precision management approaches allow producers to identify these differences and manage resources more effectively. More precise fertiliser placement and application can improve efficiency while reducing unnecessary input costs.

Advances in precision agriculture technologies are offering new opportunities to improve nutrient management. Improved monitoring systems, remote sensing technologies, and digital decision-support tools enable producers to gather higher-quality information and make more informed decisions. These technologies are expected to expand as producers seek greater

efficiency and more precise resource allocation.

Root development

Healthy root systems are essential for water uptake, nutrient acquisition and overall plant resilience. Soil conditions that restrict root growth reduce the effectiveness of fertiliser and irrigation programmes, often limiting yield potential. Improving soil structure and biological function therefore contributes directly to crop performance by creating conditions that support strong root development.

The relationship between water management and nutrition must be emphasised. Nutrient uptake depends heavily on adequate soil moisture and root activity. Water stress can reduce nutrient availability and limit the benefits of otherwise well-designed fertilisation programmes. Conversely, efficient water management supports nutrient uptake and helps maximise the return on applied inputs. Nutrition and irrigation should therefore be managed as interconnected rather than independent production factors.

Economic sustainability

Producers face increasing pressure from rising input costs, market uncertainty, and environmental variability. Soil health practices and improved nutrient efficiency provide opportunities to reduce risk and strengthen profitability. Investments

in soil improvement can yield returns through better productivity, improved resource utilisation and greater resilience to environmental stress.

Advances in fertiliser technologies, biological products and nutrient delivery systems are expanding the range of tools available to producers. However, innovation should be evaluated on demonstrated agronomic and economic performance. Adoption should be based on measurable outcomes rather than perceived benefits alone.

Biological products

As an emerging component of integrated nutrition programmes, biological products can enhance nutrient availability, support soil biological activity, and improve root function. Their value appears greatest when incorporated into broader soil health strategies rather than being used as stand-alone interventions. Effective implementation requires a clear understanding of how biological processes influence crop production.

Healthy soils provide benefits that extend beyond immediate yield outcomes. Improved soil function enhances the capacity of production systems to withstand drought, excessive rainfall and other environmental pressures. This resilience becomes increasingly important as climate variability and resource constraints continue to affect agricultural production.

TAKE-HOME MESSAGES

- An increased focus is needed on soil biology, wider adoption of conservation agriculture principles, growing interest in cover crops, greater emphasis on nutrient-use efficiency and increased utilisation of precision agriculture tools.
- The industry is clearly shifting toward viewing soil health as a core business asset rather than solely an environmental consideration.
- The key strategic implication for the potato industry is that future productivity and profitability will increasingly depend on soil quality and functionality.
- Sustainable production gains are likely to result from improving soil health, biological activity, and nutrient efficiency rather than simply increasing input usage.
- Producers who build resilient, biologically active and well-managed soils will be better positioned to manage risk, maintain productivity and remain competitive in an increasingly challenging production environment.

#3: Plant vitality

The factors that influence plant vitality in potato production and how producers can use diagnostics, physiology-based management, and integrated crop management practices to improve productivity and reduce risk, took centre stage at the 2026 Potatoes SA Congress and Seed Grower's Forum. A central theme was that yield is the cumulative result of plant performance throughout the season. By the time yield losses become visible at harvest, the opportunity to correct many production constraints has often passed.



Diagnosing and analysing

Plant diagnostics formed a key component of the discussion. While soil analysis remains essential for evaluating nutrient availability and identifying potential limitations, plant tissue analysis directly assesses what the crop is absorbing and utilising. Combining soil and plant analysis gives producers a more complete understanding of crop performance and helps identify developing constraints before they reduce yield potential.

An important distinction was made between nutrient presence and nutrient uptake. Nutrients may be present in sufficient quantities within the soil profile but remain unavailable because of environmental conditions, root restrictions, or interactions with other nutrients. Plant tissue analysis helps determine whether fertilisation programmes achieve the intended outcome within the crop itself, rather than merely increasing nutrient concentrations in the soil.

Early and ongoing detection

The growing use of crop monitoring technologies, diagnostic tools, and analytical systems allows producers to shift from corrective to predictive management. The objective is to detect problems early enough that corrective action remains effective.

Plant vitality was presented as the

cumulative result of physiological processes that drive growth, development, and tuber production. Crop performance depends on the plant's ability to maintain photosynthesis, transport nutrients efficiently, and convert available resources into biomass and yield.

Maintaining physiological activity throughout the season is therefore critical. Heat stress, nutrient imbalances, moisture fluctuations, and disease pressure can disrupt plant function long before visible symptoms develop. Understanding plant physiology is becoming increasingly important in production planning, because many yield limitations originate from processes that are not immediately visible in the field.

The discussion reinforced the idea that yield should not be managed in isolation. Yield formation is the outcome of thousands of physiological processes operating throughout the season. Successful production systems focus on maintaining plant function from emergence through to harvest.

A balancing act

Balanced nutrition remains fundamental to plant vitality. Potato crops require a continuous supply of nutrients to support canopy development, root growth, tuber

initiation, and tuber bulking. Both deficiencies and excesses can reduce physiological efficiency and limit production potential.

The discussion highlighted the value of adjusting nutrition programmes according to crop requirements throughout the season rather than relying exclusively on fixed fertiliser plans. Monitoring systems and plant analysis offer opportunities to refine nutrient management based on prevailing conditions and crop demand.

Soil functionality

Root development was identified as an equally important determinant of crop performance. Root systems govern water uptake, nutrient acquisition, and the plant's ability to tolerate environmental stress.

Restrictions caused by soil compaction, poor structure or adverse soil conditions can limit productivity regardless of the quality of above-ground management.

Plant vitality was therefore linked directly to soil functionality. Healthy soils support root growth, biological activity and nutrient cycling, all of which influence the crop's ability to utilise available resources efficiently.

Stress factors

Environmental stress remains a primary constraint to potato

production. Heat, cold, drought, waterlogging, nutrient imbalances, and disease pressure all reduce physiological performance and affect yield potential.

The discussion noted that stress events are often cumulative. While a single stress event may have limited impact, repeated challenges throughout the season can substantially reduce crop performance, particularly during critical growth stages such as tuber initiation and bulking.

Reducing stress requires a proactive management approach. Identifying developing constraints early increases the likelihood of successful intervention and improves the crop's ability to recover. This approach shifts production management away from reacting to visible symptoms, to maintaining consistent crop performance throughout the season.

Availability of water

Water management forms a critical part of this strategy. Soil moisture influences root activity, nutrient movement, and plant function. Consistent water availability supports crop development and improves the effectiveness of nutritional and crop protection programmes.

TAKE-HOME MESSAGES

- Plant vitality cannot be achieved through isolated interventions. Nutrition programmes, biological products, irrigation management, soil management, and crop protection strategies must operate as integrated components of the production system.
- Biological, nutritional, and crop protection tools all contribute to plant performance by supporting physiological function and reducing stress. Their value depends on how effectively they integrate into the broader production programme rather than being used in isolation.
- Advances in digital agriculture, crop monitoring systems, and decision-support technologies are improving producers' ability to coordinate these interventions. However, technology itself does not create value. The benefit lies in turning information into timely, effective management decisions.
- Important industry trends include increased use of plant tissue analysis, greater reliance on crop monitoring technologies, growing adoption of data-driven management systems and improved understanding of plant physiology as a driver of yield formation.
- Future productivity gains are more likely to come from management precision rather than increased input use.
- Earlier identification of production constraints, improved understanding of crop physiology, and integrating diagnostic tools into routine management offer opportunities to improve efficiency and reduce production risk.
- Plant vitality provides a practical framework for improving productivity, resilience, and profitability.
- Producers who integrate diagnostics, monitoring, nutrition, root health, and stress management into cohesive production systems will be better positioned to achieve consistent performance under increasingly variable production conditions.



#4: Regulatory environment and policy priorities

The changing regulatory environment facing agriculture and its implications for crop production, input availability, trade, innovation, and long-term industry competitiveness was one of the key aspects addressed during the 2026 Potatoes SA Congress and Seed Grower's Forum. The discussions also covered the growing influence of international regulatory trends, increasing scrutiny of crop protection products, and the need for science-based decision-making in agricultural policy development.



Outside our borders

One component of the discussion was the growing impact of regulatory decisions made outside South Africa. Agricultural regulations developed in major export markets increasingly influence production practices in countries that trade with those markets. This creates a situation where local producers are often affected by policy decisions in jurisdictions with different production environments, climate conditions, and agricultural challenges. South African agriculture's ability to remain competitive therefore depends not only on domestic regulations but also on understanding global policy developments.

Protecting our crops

Crop protection regulations have evolved over time. Regulatory systems were traditionally designed to evaluate safety and efficacy through scientific risk assessment. Increasingly, however, political, social, and consumer pressures also influence regulatory decisions. This shift has created greater uncertainty regarding the future availability of active ingredients and crop protection tools that have historically played a role in agricultural production.

The gradual reduction in the number of active ingredients

available to producers is a cause for concern. The loss of crop protection products limits the range of management options available to combat pests, diseases, and weeds. This increases production risk, especially in crops with few alternatives. A shrinking toolbox may also accelerate resistance development as producers become increasingly dependent on a smaller range of chemistries.

The issue extends beyond crop protection alone. Reduced access to approved technologies can affect productivity, production costs, environmental management, and farmers' ability to respond to emerging threats. Regulatory decisions therefore have consequences throughout the production system and can influence both short-term operational decisions and long-term investment planning.

The discussion highlighted the importance of maintaining a regulatory framework that balances safety, innovation, and agricultural productivity. Effective regulation protects human health and the environment while enabling producers to access the technologies required to maintain sustainable production. The challenge is ensuring regulatory systems remain robust without becoming barriers to innovation or food production.

Risk-based regulation

Sound regulatory systems assess both hazard and exposure when evaluating agricultural technologies. Risk cannot be determined solely by the presence of a potentially hazardous trait; it must also consider how a product is used, under what conditions, and at what level of exposure. Maintaining this distinction is critical to ensuring that regulatory decisions remain scientifically defensible.

Public perceptions of agricultural technologies often differ from scientific assessments. Consumer concerns, activist campaigns, and public narratives can influence policy discussions even when scientific evidence suggests a different interpretation. This creates a growing need for effective communication among the agricultural sector, policymakers, and the broader public.

Transparency and public trust are increasingly important components of regulatory decision-making. Agricultural industries cannot assume that scientific evidence alone will secure public support for modern technologies. Stakeholders are increasingly expected to explain not only how technologies function, but also why they are necessary and how their benefits compare with potential risks.

Role of biological products

Interest in biological alternatives

continues to increase as regulatory pressure on conventional crop protection products intensifies. Biological technologies offer opportunities to diversify crop protection strategies and contribute to integrated production systems. However, the discussion emphasised that biologicals should be evaluated based on scientific evidence and performance data rather than viewed as automatic replacements for conventional products.

Current regulatory pathways for biological products present their own challenges. Approval processes often remain lengthy and complex, delaying the introduction of recent technologies to the market. Improving regulatory efficiency is a step toward encouraging innovation and expanding the range of solutions available to producers.

Innovation

Agriculture's future competitiveness will depend on continued access to modern technologies, including crop protection products, biological solutions, precision agriculture tools, and genetic improvements. Regulatory systems shape how quickly these innovations reach

producers and how effectively they can be adopted in commercial farming systems.

Trade implications

Agricultural exports increasingly operate within a framework of differing international standards and regulatory requirements. Producers and exporters must navigate complex compliance systems while maintaining market access. Regulatory divergence between countries can create technical barriers to trade and increase the cost of doing business.

The congress explored the need for greater regulatory harmonisation. While countries must retain the ability to address local conditions, greater alignment between regulatory systems could improve efficiency, reduce duplication, and facilitate trade. Harmonisation may also improve the availability of agricultural technologies by reducing the cost and complexity associated with product registrations across multiple jurisdictions.

Industry collaboration

No single organisation can effectively engage with all aspects of the

regulatory landscape. Industry associations, producer organisations, research institutions, and private companies all play a significant role in ensuring that scientific evidence informs policy discussions and that agricultural interests are represented during regulatory processes.

The growing pace of regulatory change must be considered. New environmental objectives, sustainability requirements, and market expectations continue to shape agricultural policy. Producers and agribusinesses increasingly must be able to anticipate change rather than simply react once new regulations are introduced. Early engagement with policymakers and proactive planning are becoming essential components of business strategy.

Regulations and the regulatory environment should not be viewed solely as a compliance issue. Regulatory developments increasingly influence competitiveness, innovation, investment decisions, and market access. Understanding policy trends is therefore becoming a strategic requirement for both producers and agricultural businesses.

TAKE-HOME MESSAGES

- Industry must be acutely aware of increasing scrutiny of crop protection technologies, the growing influence of international regulatory frameworks, rising interest in biological products, greater emphasis on sustainability-related regulation and increasing interaction between science, public perception, and policy development. Collectively, these developments point to a regulatory environment that is becoming more complex and interconnected.
- The agricultural sector increasingly needs stronger communication of science and scientific findings. Scientific evidence remains fundamental to regulatory decision-making, but technical information must be communicated in a way that is accessible to policymakers, consumers, and other stakeholders. Poor communication may lead to policy decisions being shaped by perception rather than evidence.
- Regulatory developments will continue to influence production systems, technology adoption, and market access.
- Maintaining competitiveness will require active engagement with policy processes, support for science-based regulation, and continued investment in innovation.
- The potato industry's ability to adapt to changing regulatory conditions while retaining access to effective production tools will help support future productivity, sustainability, and food security.

#5: Logistics and value chain optimisation

The efficiency of the potato value chain and opportunities to reduce costs through better coordination, improved logistics, stronger data integration, and a more demand-driven approach to production and distribution were key topics at the 2026 congress. Discussions moved beyond transportation alone and considered how decisions across the value chain influence efficiency, profitability, and responsiveness to market requirements.



Demand-led value chains

Production decisions have historically been based largely on what growers can produce, with markets identified afterwards. Increasingly, however, retailers, consumers, and processors are determining the specifications, quality requirements, and timing of product demand. As a result, value chain planning is shifting toward a model in which market requirements influence production, logistics, and inventory decisions from the outset.

This shift requires much greater connectivity between the different participants in the value chain. Growers, logistics providers, marketers, retailers and service providers all possess information that influences operational decisions. When this information remains fragmented, inefficiencies emerge through unnecessary transport costs, inventory build-up, duplicated activities, and poor responsiveness to changing market conditions.

Data as an asset

Data is one of the most underutilised assets within agricultural value chains. Large quantities of information are generated throughout the production and marketing process, yet much of this information remains disconnected. Greater integration of production, logistics, and market data will create

opportunities to improve planning and support faster decision-making across the chain.

Real-time visibility emerged as a particularly important requirement. Effective decision-making depends on knowing where products are located, what inventory is available, how transport assets are being utilised and what demand patterns are developing in the marketplace. Increased visibility reduces uncertainty and allows value chain participants to respond more effectively when conditions change.

Technology is creating new opportunities to improve this visibility. Digital platforms increasingly allow producers, transport operators, marketers, and retailers to connect through shared information systems. These platforms do not simply collect data; they transform information into operational intelligence that can support planning, forecasting, and execution throughout the supply chain.

The discussion considered the growing importance of control tower systems and centralised operational oversight. Such systems provide a consolidated view of value chain activity and allow potential problems to be identified before they disrupt operations. Better 'visibility' enables faster intervention when transport delays, inventory shortages, or market

fluctuations occur.

Transport efficiency

The movement of agricultural products represents a significant cost within the value chain, particularly as fuel, vehicle, and operational costs continue to rise. Improving vehicle utilisation was identified as one of the most immediate opportunities to reduce costs. Empty return trips, partially loaded vehicles, and poor route planning all contribute to higher transport expenses and lower overall efficiency.

Optimising vehicle utilisation requires better coordination between different supply chain participants. Individual organisations often plan transport independently, even when opportunities exist to consolidate loads or improve route efficiency. Greater collaboration can reduce costs while improving the use of available transport capacity.

Infrastructure is a key factor in logistics performance. Reliable transport networks, storage facilities, and supporting services remain fundamental requirements for efficient product movement. While industry participants cannot always address infrastructure challenges directly, better planning and coordination can reduce their impact on value chain performance.

Inventory management

Excess inventory increases storage costs, ties up working capital, and may create quality risks. Insufficient inventory, however, can cause supply interruptions and reduce market responsiveness. Finding the right balance requires accurate demand forecasting and close coordination across production, storage, and distribution.

Demand forecasting emerged as a major opportunity. Better forecasting improves production planning, logistics scheduling, and inventory management while reducing waste throughout the value chain. More accurate demand predictions allow producers and marketers to align supply more closely with consumer needs, improving both efficiency and profitability.

The increasing sophistication of forecasting tools available to the industry is a positive development. Advances in data analytics make it possible to combine historical trends, seasonal patterns, consumer behaviour and market intelligence to support more accurate planning decisions. Information is becoming as important as physical infrastructure in determining supply chain performance.

Traceability and transparency

Consumers, retailers and export markets require increasing levels of assurance regarding product origin, quality and handling. Tracking products throughout the value chain supports compliance, improves accountability, and strengthens confidence in the integrity of the supply system.

Enhanced traceability also improves operational efficiency. When accurate information is available on product movement and inventory status, it becomes easier to identify bottlenecks, reduce losses, and respond more quickly to market requirements. Traceability therefore delivers both commercial and compliance benefits.

Role of digital marketplaces

Technology-based trading platforms are changing traditional marketing channels by improving transparency, facilitating price discovery, and broadening market access. These platforms allow market signals to move more quickly through the value chain, improving alignment between supply and demand.

Efficient value chains cannot be developed by optimising individual businesses alone. Success increasingly depends on how

effectively different participants work together, share information, and align operational objectives. Decisions made in one part of the chain frequently affect performance elsewhere, highlighting the need for coordinated planning and communication.

Risk management

Transport disruptions, infrastructure failures, market volatility, and operational bottlenecks all challenge value chain performance. Building resilience requires flexibility, visibility, and the ability to respond rapidly when disruptions occur. Systems that provide timely information and support coordinated decision-making improve the industry's ability to manage uncertainty.

Sustainability considerations are becoming increasingly integrated into logistics planning. Efficient transport networks, improved asset utilisation, and reduced waste contribute not only to lower operating costs but also to reduced environmental impacts. Economic and sustainability objectives are becoming more closely aligned as resource efficiency becomes a key measure of supply chain performance.

TAKE-HOME MESSAGES

- Industry must stay abreast of the increasing digitisation of logistics systems, wider adoption of data-driven decision-making, growing demand for traceability, greater use of integrated information platforms, and a shift towards demand-led value chains.
- There is also growing recognition that value chain performance depends on collaboration and information sharing rather than optimising individual components in isolation.
- Future competitiveness will depend on the industry's ability to connect production, logistics, and market intelligence into a coordinated system.
- Cost reduction opportunities remain throughout the value chain, but often depend on improved visibility, better planning, and closer collaboration between stakeholders.
- As agricultural supply chains become more complex and market expectations continue to evolve, information management, forecasting and logistics integration will play an increasingly important role in supporting profitability and long-term competitiveness.

#6: Consumer change management

Changing consumer behaviour is reshaping food markets and shaping the future positioning of potatoes within South Africa's food system. The 2026 congress focussed on evolving purchasing decisions, shifts in consumer expectations, affordability pressures, nutrition, retail dynamics, digital commerce, and opportunities to strengthen demand for potatoes in both traditional and emerging markets. A consistent theme was that future growth in potato consumption cannot be taken for granted and will depend on the industry's ability to adapt to changing consumer needs and buying patterns.



Understanding consumers

Historically, production decisions were often driven by supply-side considerations, with marketing and consumer engagement occurring later in the value chain. A growing need exists for a more demand-driven approach, where production, product development, and market strategies are informed by consumer expectations from the outset.

Understanding who consumers are, how they make decisions, and what influences purchasing behaviour is becoming increasingly important for maintaining and expanding potato consumption.

Understanding the changing economic realities facing consumers is important. Continued pressure on household incomes is influencing purchasing decisions across food categories. Affordability remains one of the key factors influencing food purchases, particularly among lower- and middle-income households. Potatoes continue to hold a competitive advantage as an affordable staple food; however, affordability alone is no longer sufficient to guarantee future demand. Consumers are increasingly evaluating products according to value, convenience, nutritional benefits, and overall eating experience.

Nutrition and lifestyle

Consumers are becoming more conscious of the nutritional

characteristics of the food they purchase, creating both opportunities and challenges for the potato industry. The discussion highlighted the need to communicate the nutritional value of potatoes more effectively and ensure that consumer perceptions align with scientific evidence about their role in a balanced diet. This includes reinforcing potatoes' contribution to food security, energy supply, and nutritional well-being.

Changing lifestyles are also influencing food demand. Consumers increasingly seek convenience, ease of preparation and products that fit modern living patterns. Time constraints, urbanisation, and changing household structures are also shaping food preferences. Future demand growth may depend partly on the industry's ability to present potatoes in formats that align with changing lifestyle requirements while maintaining affordability and nutritional value.

Communication strategies

A growing disconnect exists between agricultural production and consumers' understanding of food systems. Many consumers are increasingly removed from farming and often have limited knowledge of how food is produced. This creates opportunities for misinformation and can influence purchasing decisions. Stronger communication strategies are needed to connect consumers

with the realities of agricultural production and the value potatoes provide.

Younger generations are entering the market with different expectations, information sources, and purchasing habits than previous generations. Digital engagement, social media influence, and changing dietary preferences are shaping consumer behaviour. The potato industry needs to understand these emerging consumer segments and develop approaches that remain relevant to future generations of buyers.

Digital channels

E-commerce platforms and digital marketplaces are increasingly influencing how consumers access products and how food moves through value chains. The digital economy is creating new opportunities for producers and suppliers to engage with consumers, improve market access, and gather valuable information about purchasing behaviour. These developments are transforming traditional market structures and creating more direct connections between production and consumption.

Digital platforms are not only sales channels but also sources of market intelligence. Consumer purchasing patterns generate large amounts of data that can inform production planning, product

positioning, and marketing strategies. Greater access to consumer data allows industry participants to identify trends more rapidly and respond to changing market conditions more effectively. This represents an important shift from historical approaches that relied on less direct consumer feedback mechanisms.

Transparency

Modern consumers increasingly want information about where food comes from, how it was produced, and whether it meets certain environmental or social standards. This trend creates opportunities for producers who can demonstrate responsible production practices and maintain high levels of product quality and consistency. Traceability and transparency are becoming increasingly important components of competitiveness within food markets.

Sustainability

The industry needs to expand demand rather than relying solely on existing consumption patterns. Future growth will depend on identifying new opportunities, engaging different consumer segments, and adapting products and marketing approaches to changing market realities. This

requires continuous innovation throughout the value chain and a willingness to challenge traditional assumptions about consumption behaviour.

Potatoes remain an important crop in the broader food system because of their productivity, nutritional contribution, and affordability. The industry therefore has a role beyond commercial objectives, including supporting accessible food supplies for a growing population. Maintaining affordability while responding to changing consumer demands represents an important balancing act for the sector.

The relationship between sustainability and consumer preference is important. More consumers are interested in how food production affects environmental outcomes. Although affordability remains a dominant purchasing factor, sustainability considerations are becoming more influential within some market segments. Therefore, sustainability messaging must align with practical consumer concerns and be supported by verifiable production practices.

Retail dynamics

Retailers increasingly rely on consumer data to guide merchandising decisions,

product placement, and category management. The congress highlighted the importance of collaboration among producers, processors, retailers, and market platforms to keep products aligned with consumer demand. Better integration across the value chain can improve responsiveness to market signals and strengthen overall competitiveness.

Potatoes need to be positioned as a relevant food choice in a highly competitive food environment. Consumers have access to an increasing range of products and alternative carbohydrate sources. Maintaining market share requires ongoing efforts to reinforce potatoes' value proposition in terms of affordability, versatility, convenience, and nutrition. Potatoes must remain visible and attractive within evolving consumer markets.

Data and analytics

Access to reliable consumer information enables more targeted decision-making across the value chain. Marketing strategies, product development initiatives, and production planning can all benefit from a deeper understanding of consumer behaviour. The ability to anticipate demand shifts may become a significant competitive advantage.

TAKE-HOME MESSAGES

- Consumers are increasingly focussing on nutrition and health, along with a growing demand for convenience.
- Consumers are expanding their use of digital purchasing channels.
- Transparency and sustainability are becoming increasingly important for consumers.
- Retailers and other value chain role-players are increasingly relying on consumer data to guide business decisions.
- A clear movement toward more consumer-centric value chains is underway, prioritising demand signals throughout the production and marketing process.
- Future consumption growth will depend on a stronger alignment between production systems and consumer expectations.
- Affordability will remain important, but success will increasingly require attention to nutrition, convenience, transparency, sustainability, and digital engagement.
- Consumer change management is not simply a marketing challenge but a value-chain challenge that affects production, product development, distribution, and communication.
- Producers and industry stakeholders who understand and respond to these changing dynamics will be better positioned to grow demand, strengthen market relevance, and ensure the long-term competitiveness of the potato industry.

#7: Competing in a changing global market

Numerous factors influence market access and long-term competitiveness in increasingly complex domestic and international markets. While production efficiency remains a fundamental requirement, market success increasingly depends on a combination of product quality, supply reliability, logistics performance, regulatory compliance, customer relationships, and market intelligence. Competitive advantage is no longer created solely at the farm level but stretches across the entire value chain.



ECONOMIC GROWTH
AND MARKET
EXPANSION

Production and business success

The distinction between producing a crop and competing successfully in a market matters, as production capacity alone does not guarantee commercial success. Markets increasingly demand consistency, quality assurance, traceability, and reliable delivery. Buyers are placing greater emphasis on whether suppliers can meet specific requirements continuously and predictably rather than occasionally producing exceptional yields. Long-term competitiveness therefore depends on aligning production systems with market expectations.

The international trade environment is becoming more complex by the day. Export markets are influenced by changing regulations, phytosanitary requirements, geopolitical developments, consumer preferences, and sustainability expectations. These factors can create opportunities in some regions while simultaneously limiting access to others. Producers and exporters therefore operate within a landscape where market conditions evolve continuously and where adaptability has become a strategic requirement.

Market intelligence

Competitive decision-making relies heavily on market intelligence. Understanding where demand is

developing, which products are required, and how competing suppliers are positioned allows businesses to respond proactively rather than reactively. Market information is becoming more available, but competitive advantage depends on the ability to interpret this information and translate it into strategic action. Successful industries understand not only where markets currently exist but where future opportunities are likely to emerge.

Customer requirements are very important in shaping production and marketing decisions. Buyers increasingly specify quality standards, packaging requirements, delivery schedules, and traceability expectations. Market access is therefore not achieved through a once-off transaction but through a continuous process of meeting and maintaining customer confidence. As markets become more sophisticated, suppliers are expected to provide assurance across multiple performance areas beyond product quality alone.

Phytosanitary compliance

One of the most important determinants of international market access is phytosanitary compliance. Plant health standards play a central role in protecting agricultural industries and regulating product movement between countries.

Compliance requires effective monitoring, surveillance, and risk management systems throughout the value chain. Failure to meet phytosanitary requirements can lead to market restrictions, higher costs, and damage to commercial relationships.

Protecting our national plant health status was also highlighted as a strategic priority. Effective biosecurity systems support domestic production while protecting export opportunities. Pest and disease incursions can have consequences that extend far beyond individual farms, and affect the reputation and competitiveness of entire industries. Preventative measures, surveillance programmes, and rapid response capabilities are therefore essential components of market access strategies.

Logistics

Transportation networks, port efficiency, storage facilities, and distribution systems directly influence the cost and reliability of supplying markets. Infrastructure limitations can increase costs, reduce flexibility, and affect service delivery. As margins tighten and customer expectations rise, logistics performance becomes an increasingly important differentiator between competitors.

Infrastructure challenges affect the entire agricultural sector.

Moving products efficiently through domestic and export channels requires reliable transport systems and predictable logistics performance. Delays, disruptions, and inefficiencies increase costs across the supply chain and may undermine customer confidence. Improving competitiveness therefore requires both operational improvements and broader infrastructure development.

Changing consumer expectations

Consumers are becoming more interested in how food is produced, transported and marketed. Sustainability, resource stewardship, and transparency are increasingly influencing purchasing decisions across many markets. Retailers and food companies are responding by introducing additional requirements that suppliers must meet to maintain market access.

Sustainability is consequently becoming a commercial consideration rather than solely an environmental objective. Market requirements increasingly extend beyond product quality and price to include evidence of responsible production practices. The ability to demonstrate sustainability performance, resource efficiency, and traceability may become an increasingly important component of future competitiveness.

Advantages of diversification

Heavy reliance on a limited number

of markets exposes industries to regulatory changes, economic downturns, and shifts in consumer demand. Diversification spreads risk and creates opportunities to access different customer segments. Expanding market reach also improves resilience and reduces dependency on any single destination.

Trade relationships are increasingly built on reliability and consistency. Buyers seek suppliers who can meet specifications repeatedly and fulfil commitments over extended periods. Market access therefore depends as much on trust as on product availability. Long-term relationships are often strengthened by consistent quality, dependable service, and clear communication throughout the supply chain.

Collaboration is essential for overcoming market access barriers. Individual producers may struggle to address regulatory requirements, market development challenges or phytosanitary issues independently. Industry organisations, government departments, researchers and private businesses all play important roles in supporting market development and protecting existing trade opportunities.

Data and information systems

Advances in production systems, handling procedures, packaging technologies and traceability platforms are creating opportunities to improve efficiency and meet

changing customer expectations. Innovation can support differentiation in competitive markets and strengthen the industry's ability to respond to emerging trends.

Data and information systems are becoming increasingly important in trade and market access. Accurate production records, traceability systems, and quality assurance documentation support compliance requirements and give customers greater confidence in supply chains. Information has become an important commercial asset, particularly in markets that demand transparency and accountability.

Strategic positioning

Risk management remains central to international trade. Market conditions can change rapidly due to regulatory developments, exchange rate movements, geopolitical events or shifts in consumer demand. Businesses that monitor these factors and prepare for potential disruptions are generally better positioned to maintain competitiveness during periods of uncertainty.

South African agriculture needs to position itself strategically within global markets. Success depends not only on accessing markets but on competing effectively once access has been secured. This requires a combination of production efficiency, strong logistics, market intelligence, compliance capabilities and customer-focussed value chains.

TAKE-HOME MESSAGES

- An increased focus is needed on phytosanitary compliance, growing sustainability requirements, expanding traceability expectations, greater use of market intelligence and a stronger emphasis on supply-chain transparency.
- Competitive advantage is becoming increasingly dependent on factors beyond primary production, requiring closer alignment between market requirements and value-chain performance.
- Future growth opportunities will depend on the industry's ability to combine production excellence with market responsiveness.
- Access to markets remains important, but long-term success will depend on the ability to maintain that access through compliance, consistency, reliability, and strategic engagement.
- Industries that understand their markets, anticipate change and build resilient value chains will be best positioned to compete in an increasingly demanding global environment.

#8: Environmental, social and governance principles

Environmental, social and governance (ESG) principles are reshaping agricultural value chains and influencing investment, market access, business resilience, and long-term competitiveness. The 2026 Potatoes SA Congress focused on the practical implications of sustainability requirements for primary producers, agribusinesses, and value-chain partners, while examining how the potato industry can position itself for future growth in an environment increasingly shaped by environmental accountability, social responsibility, and stakeholder expectations.



A strategic business aspect

ESG should not be viewed as a separate compliance exercise or reporting requirement; instead, it is becoming integrated into how businesses access markets, attract investment, manage risk, and maintain long-term profitability. Sustainability considerations increasingly influence decision-making across agricultural value chains, making ESG a strategic business issue rather than a standalone environmental initiative.

Consumers, retailers, financial institutions, and policymakers increasingly place expectations on agricultural industries. Stakeholders demand greater transparency regarding production practices, resource use, labour standards, and environmental impact. These expectations continue to expand beyond product quality and food safety, placing greater emphasis on how agricultural products are produced and brought to market.

Environmental stewardship

Resource management practices, particularly those relating to soil, water and energy use, are becoming increasingly important indicators of sustainability performance. Efficient

resource utilisation not only improves environmental outcomes but also supports long-term production resilience and profitability. Producers are increasingly expected to manage natural resources responsibly while maintaining commercial viability.

Climate change remains one of the most significant long-term risks facing agriculture. Production systems need to adapt to increasingly variable climate conditions while reducing exposure to climate-related disruptions. Resilience is becoming a key measure of sustainability, with growing emphasis on production systems that can withstand environmental shocks without compromising productivity.

Carbon management

Carbon accounting, carbon markets, and carbon reduction strategies are becoming increasingly relevant within agricultural industries. Organisations across the value chain are seeking a better understanding of their carbon footprint and exploring opportunities to reduce emissions while improving efficiency. The discussion highlighted that carbon management is moving from a voluntary consideration to a more strategic business requirement.

Carbon markets were identified as an emerging opportunity for agriculture. Improvements in soil management, resource efficiency and other sustainability practices may create opportunities to generate additional value through carbon-related initiatives. However, the discussion emphasised the importance of credible measurement systems and scientifically robust methodologies to ensure that sustainability claims are accurate and defensible.

Sustainability transitions

Financial institutions increasingly incorporate ESG considerations into lending, investment and risk assessment processes. Access to capital is increasingly linked to an organisation's ability to demonstrate responsible management practices, long-term resilience, and sound governance structures. This trend is likely to strengthen as sustainability considerations become more deeply embedded within financial systems.

Governance emerged as an important but often overlooked component of sustainability. Effective governance provides the framework through which businesses manage risk, maintain accountability and

support long-term strategic planning. Transparent decision-making processes, regulatory compliance and responsible leadership all contribute to the resilience and credibility of agricultural businesses.

Social sustainability

Agricultural businesses operate within broader communities and labour systems that influence long-term industry stability. Workforce development, employee wellbeing, skills transfer and community engagement increasingly form part of sustainability assessments conducted by investors, retailers and consumers. Social considerations are therefore becoming more closely linked to commercial performance and reputational value.

Data is becoming increasingly important for measuring and demonstrating sustainability performance. Stakeholders increasingly require evidence rather than general commitments. Accurate data on environmental performance, resource use, labour practices, and governance systems enables organisations to track progress, identify areas for improvement, and communicate performance to customers, investors, and regulators.

Traceability systems are playing a growing role in this process.

The ability to verify production practices and provide transparency across supply chains supports both sustainability reporting and market requirements. As supply chains become more interconnected, access to reliable data is becoming a prerequisite for maintaining credibility and meeting stakeholder expectations.

Market requirements

Retailers and food companies increasingly influence sustainability standards across agricultural supply chains. Market requirements now extend beyond product specifications to include expectations relating to environmental stewardship, packaging, resource efficiency, and social responsibility. These requirements are encouraging greater collaboration between producers, processors, retailers, and service providers.

Sustainability and profitability should not be treated as competing objectives. Many sustainability initiatives focus on improving efficiency, reducing waste, and managing risk, all of which contribute directly to business performance. Resource efficiency, water conservation, and improved production practices often generate financial benefits while supporting environmental objectives.

Practical implementation

As sustainability goals become more ambitious, adoption will depend on the availability of realistic, measurable, and economically viable solutions. Producers require approaches that can be integrated into commercial farming systems without undermining productivity or profitability. Moving from policy objectives to practical application remains a key challenge across the sector.

Collaboration is important in achieving sustainability objectives. Many environmental and social challenges extend beyond the boundaries of individual organisations and require coordinated action across value chains. Industry collaboration can accelerate knowledge sharing, improve consistency, and support the development of common standards and measurement frameworks.

Technology is expected to play an increasingly important role in supporting sustainability goals. Advances in monitoring systems, precision agriculture, data analytics, and reporting technologies provide opportunities to improve efficiency and measure performance more accurately. These tools enable better decision-making while strengthening the credibility of sustainability reporting.

TAKE-HOME MESSAGES

- The future is centred on resilience, adaptability, and continuous improvement.
- The agricultural industry faces increasing pressure from climate change, market expectations, resource constraints, and regulatory developments. Businesses that can adapt to these challenges while maintaining efficient and transparent operations are likely to be better positioned for long-term success.
- Important trends include greater integration of ESG considerations into financing decisions, stronger emphasis on carbon management, expanding sustainability requirements within supply chains, and stronger demand for traceability and reliance on performance data.
- There is also a clear movement toward viewing sustainability as a business strategy rather than a compliance obligation.
- ESG considerations will continue to influence the future direction of the potato industry.
- Success will depend on the ability to balance environmental stewardship, social responsibility, and commercial performance within a rapidly changing operating environment.
- Organisations that can demonstrate resilience, transparency and continuous improvement will be better positioned to attract investment, maintain market access, and participate in future growth opportunities across the agricultural value chain.