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# **GM CONTAMINATION, CARTELS AND COLLUSION IN SOUTH AFRICA'S BREAD INDUSTRY**



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The African Centre for Biosafety (ACB) is a non-profit organisation, based in Johannesburg, South Africa. It was established to protect Africa's biodiversity, traditional knowledge, food production systems, culture and diversity, from the threats posed by genetic engineering in food and agriculture. It, has in addition to its work in the field of genetic engineering, also opposed biopiracy, agrofuels and the Green Revolution push in Africa, as it strongly supports social justice, equity and ecological sustainability.

The ACB has a respected record of evidence-based work and can play a vital role in the agro-ecological movement by striving towards seed sovereignty, built upon the values of equal access to and use of resources.

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Design and layout: Adam Rumball, Sharkbouys Designs, Johannesburg

Original cover image: <https://www.greggs.co.uk/assets/Uploads/Bread/White-Bread.jpg>

## **Acknowledgements**

The African Centre for Biosafety acknowledges the generous support of Bread for the World and Stefanie Swanepoel for her work in researching and producing this paper for the ACB.



*"Greed and corruption in some sectors of South African business and industry seem limitless. And this shameful behaviour becomes even more distasteful when it seems to hammer the final nail into the coffin of a group already suffering in the depths of poverty, a group that has nowhere else to turn to but stick with the available staple food - bread."*<sup>1</sup>

## Summary of findings

- The wheat-to-bread value chain is highly consolidated and controlled primarily by four companies: Tiger Brands, Premier Foods, Pioneer Foods and Foodcorp. Three of these companies, Tiger Brands, Premier Foods and Pioneer Foods also dominate the market for maize meal.
- This value chain feeds into a concentrated food retail market, primarily controlled by Shoprite/Checkers, Pick n Pay, Woolworths and Spar.
- In a country where more than 50% of people do not have regular access to food, Tiger Brands and Pioneer Foods made a profit of R2.441 billion in 2013 just from their baking divisions.<sup>2</sup> The Competition Commission has previously found that Tiger Brands, Premier Foods, Pioneer Foods and Foodcorp colluded to fix the price of bread.
- South Africa's leading bread brands contain soya, most of which is genetically modified. These brands include those of Woolworths, Spar, Checkers and Pick n Pay white breads along with the Albany, Blue Ribbon and Sunbake bread brands, belonging to Tiger Brands, Premier Foods and Foodcorp respectively.
- Bread is South Africa's second most important staple food, after maize. The maize value chain is already entirely genetically modified, with its milling sector similarly controlled by Tiger Brands, Pioneer Foods and Premier Foods. The maize value chain feeds into the same concentrated food retail sector.
- Bread producers (Tiger Brands, Premier Foods and Foodcorp) and retailers (Pick n Pay, Checkers, Woolworths and Spar) are not labelling their bread as containing GM soya, as required by the Consumer Protection Act (2008) and are deceiving South African consumers.
- All GM soya grown in South Africa is liberally sprayed with herbicides that contain glyphosate (the active ingredient) and other chemicals (adjuvants). 'Roundup', Monsanto's flagship glyphosate-based herbicide, is the most popular brand in South Africa, though a multitude of other brands are available.
- Glyphosate has been linked to increased risk of chronic kidney disease, birth defects in humans and animals and spontaneous abortions.<sup>3</sup> Recent samples of urine and breast milk taken by the Moms across America organisation show an accumulation of glyphosate in breast milk.<sup>4</sup> Research has found some of the adjuvants used with glyphosate to be even more toxic than glyphosate itself. Residues of glyphosate and its adjuvants can remain in food long after the harvest.
- Both consolidation of the bread industry and the increasingly genetic modification of the country's staple foods undermine food security in South Africa. Consolidation shuts out smaller players, including small-scale farmers and millers, while genetically modified crops are cultivated in large-scale mono-cropping, commercialised farming systems, heavily reliant on high irrigation, pesticide and herbicide use. This type of farming has negative environmental consequences and is socially unjust.

# Overview of Bread in South Africa

South Africans consume about 2 800 million loaves of bread a year,<sup>5</sup> spending over R28 billion<sup>6</sup>. Bread, predominantly white bread, is a staple food for most households,<sup>7</sup> particularly for those living in low LSM (1-4) households.<sup>8</sup> It is the second biggest supplier of energy in the national diet after maize meal<sup>9</sup>.

The industry, from wheat suppliers and millers to bakers and retailers, is characterised by consolidated ownership and recurring price-fixing scandals, both of which have implications for food security. Tiger Brands, Premier Foods, Pioneer Foods and Foodcorp control about 70% of the country's bread market. In addition, Tiger Brands, Premier and Pioneer are the country's three largest milling companies. The remainder of the market is increasingly dominated by the country's big corporate retailers: Shoprite Holdings, Woolworths, Pick n Pay and Spar. The bulk of food sales in South Africa (70%) occur in these retail stores.<sup>10</sup>

There are also incestuous relationships between retailers and producers (for example, Christo Wiese is the major shareholder in Shoprite Holdings and in Brait SA, which is the majority shareholder in Premier Foods<sup>11</sup>). This kind of vertical and horizontal consolidation shuts out smaller players in the processing and retailing sectors as they cannot compete. It also eliminates alternative value chains for South Africans who want to eat GM-free maize and bread. The 2009 National Agricultural Marketing council investigation into the value chain highlighted the consolidated nature of the wheat-to-bread value chain in South Africa as a major concern.<sup>12</sup>

## Cost, consolidation and cartels in the bread industry

While South Africa is food secure at a national level, it is only sometimes secure at a community level and not at all at a household level.<sup>13,14</sup> Roughly 13 million people go hungry on a daily basis – a quarter of the population – with an additional 12 million people at risk of

hunger.<sup>15</sup> Food insecurity in the country results primarily from poverty (can't afford food), as opposed to lack of production (not enough food).<sup>16,17</sup>

## The cost of bread

Increases in prices impact negatively on poor households, who spend 34% of their household income a year on food, and 35% of this on bread and maize meal alone.<sup>18</sup> There has been significant price inflation for these products over the last three years. Price increases are indicated in the table below.<sup>19</sup>

**Table 1: Percentage price increase for bread January 2012 – January 2014<sup>20</sup>**

Price increases (%)	Jan 2012-2013	Jan 2013-2014
White bread (700g)	10.13	3.96
Brown bread (700g)	9.34	5.11

The price of bread is dependent on the profits made along the wheat-milling-baking-retail value chain by the cartels that control it.

## Wheat farmers

The volatility of wheat prices on the global market is often blamed for the increase in bread prices;<sup>21,22</sup> however, wheat producers are steadily getting less for their wheat, while bread prices keep increasing. There are an estimated 4 000 wheat producers in the country and they primarily produce bread wheat for human consumption.<sup>23</sup> About half of the wheat needed to service South Africa's bread and flour needs is imported from Argentina, Australia, France, the United States and the United Kingdom.<sup>24</sup> The country's dependence on imported wheat has increased over the years, as have bread prices.

For example, in 2009, while producer prices decreased from R1.27 (588 grams of wheat) in 2008 to R1.01 in 2009 (20%), the price of a 700g white bread loaf increased from R7.20 to R7.88 (9%).<sup>25</sup> In 2011, producer prices decreased by a further 3% and the bread price increased by 10%.<sup>26</sup> Simply put, the wheat producer – the farmer – gets roughly 3.5 slices of income from a 21-slice loaf.<sup>27</sup>

### The millers

Pioneer Foods, Tiger Brands, Premier Foods and Foodcorp are the four largest millers in the country for maize and wheat, accounting for 98% of milled wheat sales.<sup>28,29</sup> The industry is thus characterised as vertically integrated, as these companies not only control the milling of the flour, but they also make and sell the bread.<sup>30</sup> A decade ago, Pioneer was already milling 27% of all flour and Tiger Brands was milling 20%, with the balance taken up by smaller operations.<sup>31</sup>

Despite claims by Pioneer Foods that bread is a low-profit business with expected returns of between 2-4%,<sup>32</sup> published financial statements from both Tiger Consumer Brands and Pioneer Foods indicate higher profit margins in their milling and baking divisions than in the remainder of their divisions. For example, Tiger Consumer Brand's milling and baking division achieved a profit margin of 22% in 2012 compared to a 15% overall operating profit margin and Pioneer's milling and baking division achieved a 9.5% profit margin compared to an overall margin of 6.2%.<sup>33</sup>

According to the National Chamber of Milling, the industry supports the principle of consumer choice and the safe and responsible application of biotechnology in providing nutritious, quality staple foods at the best possible prices in the interests of household food security.<sup>34</sup> To this end, it is committed to encourage identity preservation within the supply chain to enable clear labelling of products for consumers.<sup>35</sup>

### The bakers

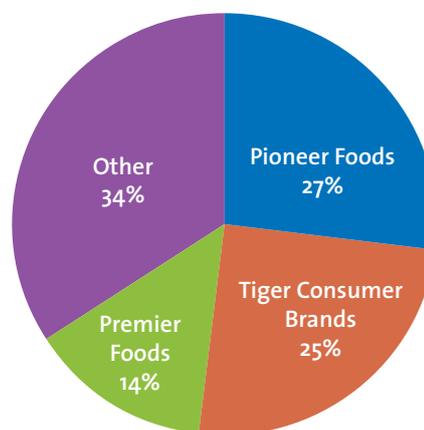
The bread industry, as with most agricultural industries, was heavily regulated in South Africa up until 1991.<sup>36</sup> It operated under a quota system and product specifications were mandated around weight, height and width of the loaf and prices were fixed, as were volumes and distribution areas for each producer.<sup>37</sup> There were about 370 bakeries operating in the country in 1991. This number has steadily decreased. Bread producers belonged to the Chamber of Baking and various issues were discussed under its auspices.<sup>38</sup> Following deregulation of the industry in the early 1990s, the Chamber of Baking continued as a forum for discussion, but it no longer had powers

to set standards or settle disputes between producers.

By 2010, four bakeries held a market share of between 50–60% of the domestic bread market in South Africa: Pioneer Foods (Blue Ribbon); Tiger Consumer Brands (Albany); Pioneer Foods (Sasko and Duens); and Foodcorp (Sunbake).<sup>39</sup> Plant bakeries, such as Tiger, Premier, Pioneer and Foodcorp, dominate the baking industry with the remainder taken up by in-store bakeries (20% in 2004), such as Pick n Pay, Spar, Shoprite and Woolworths, industrial users and small bakeries.<sup>40</sup>

The chart below indicates the dominance of the plant bakeries in the bread market in 2013.

**Figure 1: Percentage ownership of South Africa's bread market 2013**



Source: Extrapolated from Euromonitor (2014) Bakery in South Africa country report.

Pioneer Foods' major bread brands are Sasko Everyday and Duens and they held second and fifth positions respectively of the bread market in 2013.<sup>41</sup> Tiger Brand's Albany bread brand led the bread market in 2013 and Premier Food's Blue Ribbon brand held a 14% share in 2013.<sup>42</sup>

### The miller/baker consortiums' position on food labelling

**Tiger Brands (2013):** Is committed to complying with the Consumer Protection Act and relevant legislation and regulations relating to consumers.<sup>43</sup>

**Pioneer (2013):** Emphasises compliance with laws and regulation and open and honest communication, noting that consumers are increasingly concerned about environmental and social performance, including issues

such as genetically modified foods and food labelling.<sup>44</sup>

**Premier:** Notes its compliance with labelling regulations to ensure that consumers “know exactly what is inside the food you buy”.

With the exception of Pioneer Foods, none of these companies label their bread as containing GM soya.

### **The retailers**

Besides the big plant bakeries, Shoprite/Checkers, Woolworths, Pick n Pay and Spar also play a significant role in the industry with their in-house bakeries. The bulk of food sales in South Africa (70%) occur in these stores and this market is controlled primarily by Shoprite Holdings, Pick n Pay Retail Group, Spar Group, Massmart and Woolworths Holdings.<sup>45</sup> In addition, some of these companies (such as Shoprite Holdings and Spar Group) are owned by or have direct relationships with bread-producing companies, such as Premier Foods and Tiger Brands.

This illustrates the stranglehold that corporations have over the wheat-to-bread value chain in South Africa, which was highlighted as a major concern in the 2009 National Agricultural Marketing council investigation into the value chain.<sup>46</sup>

### **Consolidation**

The same companies (Tiger Brands, Premier Foods and Pioneer Foods) that control the milling and baking stages of the wheat-to-bread value chain also control 60% of the milling and processing stages of the maize value chain.<sup>47</sup> Just as with wheat, the maize value chain feeds into a highly concentrated food retail sector, dominated by Shoprite/Checkers, Pick n Pay, Woolworths and Spar.<sup>48</sup>

Consolidated corporate control of the country's staple food supply of wheat and maize is extremely concerning as it drastically locks out small players and limits consumer choice in terms of non-GM alternatives. Small players cannot make the investments or adopt practices required to compete with these cartels.<sup>49</sup> These practices include centralised distribution, increased procurement quotas and compliance with prohibitive quality and safety standards.<sup>50</sup> Indeed, these cartels' stranglehold

over our food systems denies the possibility of more equitable systems existing, or even emerging.

### **Cartels**

The flagrant, blatant and unashamed disregard for consumer rights and South African law are nothing new to the country's bread cartel. Tiger Consumer Brands, Premier Foods, Foodcorp and Pioneer have all been found guilty in the past for colluding to capture profits at the expense of consumers.

Maize and bread price-fixing scandals have resulted in several appearances by these companies before the Competition Commission Tribunal of South Africa. In 2007, Tiger Brands was fined R98.8 million after admitting that it had colluded with rivals (Premier Foods, Pioneer Foods and Foodcorp) to raise the price of bread by 30-35 cents a week before Christmas in 2006.<sup>51</sup> In 2010, Pioneer Foods was fined R195 million for its role in a bread price-fixing cartel, involving these other players as well.<sup>52</sup> Their actions affected the “poorest of the poor, for whom these products are a staple”.<sup>53</sup>

Five individual bread consumers, The Black Sash, The Children's Resources Centre, COSATU and the National Consumer Forum launched a landmark class action case against Pioneer Foods, Tiger Consumer Brands and Premier Foods in November 2010. Their application is based on the Constitutional right to food and contends that the collusion around bread pricing affected the country's poor. They are claiming R1.2 million in damages.<sup>i</sup>

They have set legal precedent in South Africa in forcing the Constitutional Court to prescribe appropriate procedures to enable South Africans to pursue their rights by means of class actions, particularly in circumstances where their constitutional rights have been violated.<sup>ii</sup>

### **Bread and GM Soya**

The quality of the bread we eat is important in terms of its nutritional value and the food security it provides to millions of South Africans. An independent testing facility, on behalf of the ACB, tested eight bread brands for GM content.<sup>54</sup> The results were astonishing.



**Table 3: Bread brands tested for GM soya content in 2014<sup>60</sup>**

Brand of Bread	Company	GM Soya Detected	Interpretation
Albany White Superior	Tiger Brands	Yes	At least 23.23% of the overall soya is GM
Woolworths White Bread	Woolworths	Yes	At least 85.62% of the overall soya is GM
Blue Ribbon White Bread	Premier Foods	Yes	At least 64.90% of the overall soya is GM
Sasko White Bread	Pioneer Foods	Yes	GM Soya detected, not quantifiable
Sunbake White	Foodcorp	Yes	At least 20.46% of the overall soya is GM
Pick n Pay White Bread	Pick n Pay	Yes	At least 42.81% of the overall soya is GM
Spar White Bread	Spar	Yes	72.69% of overall soya is GM
Checkers White Bread	Shoprite Holdings	Yes	91.09 % of overall soya is GM

Almost all of the breads that were tested for GM soya content displayed high levels - between 20.46% to a whopping 91.09% - of GM soya of the overall soya flour used in the production of the bread (see Table 3). In addition, except for one brand, the bread brands were not labelled correctly or at all, as required by the Consumer Protection Act of 2008, which came into effect in 2011.<sup>55</sup> In fact, Checkers and Spar do not even provide information of the basic ingredients on the label, as required by the Act.<sup>56</sup>

South African consumers have the right to know if the food they are eating contains GM ingredients, at least where the GM content is 5% or more.<sup>57</sup> Food producers, importers and packagers are required by the Consumer Protection Act (2008) to label food containing GM ingredients accordingly<sup>58</sup> in order to give effect to the aim of the Act, which is to “improve access to, and the quality of, information that is necessary so that consumers are able to make informed choices according to their individual wishes and needs”.<sup>59</sup>

### The food industry and labelling

The food industry has consistently stalled the implementation of the Consumer Protection Act, claiming that the law is unclear as to whether the industry should label processed foods or only living modified organisms, such as seed.

In particular, the biotech industry, in partnership with the Consumer Goods Council of South Africa –representing over 12 000 South

African retail, wholesale and manufacturing companies<sup>61</sup>, lobby to undermine the right of South Africans to know the GM content of their food, claiming that consumers’ “ignorance” about GM technology could lead to an unfair backlash against the products.<sup>62</sup> This despite the Consumer Good’s Council’s Food Safety Initiative “dedicated to protecting public health, consumer and industry interests in the area of food safety, food legislation and nutrition”.<sup>63</sup> A pro-GM lobbying organisation, AfricaBio, has forged strategic partnerships with the National Chamber of Milling and the Consumer Goods Council to put pressure on government around labelling issues.<sup>64</sup> Woolworths sits on the board and Tiger Brands and Pioneer Foods are both represented on the Council.<sup>65</sup>

South Africa’s leading retailers (Shoprite/ Checkers, Pick n Pay, Woolworths and Foodcorp) have all committed to honouring the Consumer Protection Act. Some have even gone further to say:

WOOLWORTHS (1999): “... we have undertaken to eliminate genetically modified ingredients wherever possible and work hand-in-hand with our suppliers to do so. We undertake to clearly label those remaining products that contain ingredients from crops which have been genetically modified, so that consumers can make informed choices when shopping.”<sup>66</sup>

Yet, tests conducted on Woolworth’s house brands (maize and bread) consistently show high levels of GM content either in the whole product or in the ingredients used in the product.<sup>67</sup> Woolworths ignores its own policy

and relies on the dubious “May be genetically modified” label. This label is only allowed in South Africa if it is financially or scientifically unfeasible to test for GM content. ACB’s tests of local maize products for GM content show this not to be the case.

SHOPRITE-CHECKERS (2013): Are committed to honouring the labelling requirements of the Consumer Protection Act in all supplier contracts and trade terms. Suppliers that are not compliant are required to provide a satisfactory rectification plan.<sup>68</sup>

SPAR (2013): Core principles of its sustainability strategy include providing enough information to enable consumers to make informed choices and ensuring compliance with legislation at all times.<sup>69</sup>

Both Spar and Checkers do not even provide the basic ingredients list on their own house brand breads. Establishing the ingredients is a challenge as the staff, when requested for the ingredients by the ACB, had to go looking for someone who had that information.

PICK N PAY (2013): “*Legally, all GMO ingredients in products sold in our stores must comply with the strict SA Genetically Modified Organisms Act*”.<sup>70</sup>

While Pick n Pay provides an ingredient list on their house brand bread, they do not label the GM soya content as legally required. This is in direct contravention to their stated policy.

Despite their public claims to care about the health and rights of their consumers and, in some cases, the environmental sustainability of the farming practices responsible for their products, these companies blatantly disregard the law when it suits them. Annchen Mielmann from North West University’s School for Physiology, Nutrition and Consumer Sciences notes that as food manufacturers are probably aware that 80% of South African consumers are unfamiliar with the terms “genetically modified” or “biotechnology”, they perhaps benefit from a “convenient, but unethical way to sell their products”.<sup>71</sup>

### **The hazards of GM soya**

Soya is used in bread as a lecithin, which is also found in egg yolk. Soya is now commonly used



<http://www.greenpeace.org/international/Global/international/planet-2/image/2004/6/ripening-soya-beans-in-field-n.jpg>

as an additive in foods for its emulsification properties – it binds all the ingredients together, helps baked products rise and keeps the dough from sticking.<sup>72</sup> In addition, it has a bleaching effect on flour and assists in increasing the volume and softness of the bread.<sup>73</sup>

GM soya has been commercially grown in SA since in 2002.<sup>74</sup> Over 90% of South Africa’s soya production is genetically modified. By the 2011/12 season, about 500 000 hectares were planted to GM soya<sup>75</sup> and by the end of the 2013 season this had increased to over 516 000 hectares.<sup>76</sup> Only 7% of this is used for human consumption with most of the balance processed to feed factory-farmed animals in feedlots.<sup>77</sup>

All GM soya grown in South Africa is Monsanto’s ‘Roundup Ready’ variety. ‘Roundup Ready’ crops (the most commonly grown GM crops globally and a huge money spinner for Monsanto) have been engineered to withstand liberal applications of glyphosate-based herbicides (for which ‘Roundup’ is Monsanto’s particular brand name). In every country where GM soya is grown, including South Africa, the use of glyphosate in agriculture has increased dramatically. Despite claims from Monsanto, its original developer, that ingestion of glyphosate residues on GM ingredients, such as GM soya, is not harmful to humans and animals, alarming evidence is emerging to disprove this.<sup>78</sup>

Glyphosate is not the only harmful chemical found in glyphosate-based herbicides, such as Roundup. In order for the glyphosate to be effective, it must be mixed with other chemicals, termed ‘adjuvants’. Despite evidence that some adjuvants are more toxic than

glyphosate itself (as well as enhancing the overall effects of glyphosate) the majority of regulators only assess glyphosate in isolation.<sup>79</sup>

Consumers ingest glyphosate residues, along with other toxic additives used in its manufacturing, when consuming food, such as bread. Although glyphosate is not meant to accumulate in the human body, recent tests done by the Moms across America organisation uncovered glyphosate residues in breast milk, urine samples and drinking water.<sup>80</sup> This has far reaching implications for babies, both in the womb while organs are still developing, and after birth when the first food they are given (breast milk), is essentially toxic. Other studies show that glyphosate residues contribute to chronic kidney disease in adults, neural tube defects in babies and spontaneous abortions in mothers, as well as birth defects in animals.<sup>81</sup>

As a result of these concerns, countries around the world have taken action to ban or limit its use (Sri Lanka, El Salvador, Denmark, Sweden, Brazil, the Netherlands and Argentina).<sup>82,83</sup> The United States is currently reviewing its use and, in 2015, the European Union will review its approval for use.<sup>84</sup>

In South Africa, oversight of the food system is fragmented in terms of mandates, responsibilities and accountability.<sup>85</sup> Glyphosate, registered under the Fertilizers, Farm Feeds, Agricultural Remedies and Stock Remedies Act (Act 36 of 1947), should be re-registered on an annual basis,<sup>86</sup> which would allow for a review process around its safety for human ingestion. This does not happen. It is expensive to test food products in South Africa and there is little capacity in government to monitor chemical residues in our food – there are only 11 food inspectors among the 3 264 registered environmental health practitioners in the country.<sup>87</sup>

Following pressure from the ACB, the Minister of Health, Dr Aaron Motsoaledi, wrote to the ACB in October 2012 confirming that the Directorate for Food Control would be conducting a sample run of glyphosate-residue testing of maize and soya meal during 2012/13. This was confirmed by a departmental official at a Parliamentary hearing held on 26 February 2014 into decision-making around GM crops. At the time of writing the ACB was still

trying, in vain, to access these results from the Department.<sup>88</sup>

## Conclusion

South Africa is the first and only country in the world to cultivate a genetically modified staple food – GM white maize.<sup>89</sup> Now the other staple, wheat bread, is also contaminated with GM soya, leaving South African consumers, particularly the poorer households, with very little option but to consume GM foods as part of their daily diet. Besides the lack of choice, consumers are placed at risk due to the toxic nature of glyphosate residues. South African consumers are essentially guinea pigs in human trials for the safety of GM foods, which have never undergone long-term human clinical trials.

Ownership of the wheat-to-bread value chain determines the quality and cost of the country's staple foods. This ownership rests with corporations, some of which have been found guilty of price fixing in previous years. This inequitable domination of South Africa's staple food supply runs contrary to government's desire to support small-scale producers in the agro-processing chain.<sup>90,91</sup> Equitable food systems would support the entry of small-scale producers into distribution, processing, value-adding and retailing – and open up space for local economies around them, as opposed to the current monolithic, mono-visioned and monopolised chain of food delivery.

In addition, the ingestion of the pesticides used on GM crops, such as glyphosate, pose serious health risks to South Africans. It is unacceptable that these pesticides contaminate bread, one of the country's staple foods.

It seems unconscionable that consumers who rely primarily on maize and bread as their staple foods receive a double GM dose, without their knowledge or consent.

As a matter of urgency, the ACB calls on government to:

- Ban the use of all GMOs and glyphosate in South Africa until it has exhaustively studied the health implications on the South African

public. The chemical should be reviewed annually, with participation from civil society, prior to re-registration and the results of the government-conducted trials should be released to the public.

- Hold bread producers and retailers accountable, to the full extent of the law, for their blatant disregard for consumer rights, as mandated by the Consumer Protection Act, 2008.
- Step up support and financing for small-scale and emergent farmers, millers and bakers to provide alternatives to the current corporate “ownership” of our staple food products – maize and wheat.
- Ensure that the voices of those with consumer interests at heart are included in all decision-making processes that impact on the cost and quality of the country’s staple food products.

# Appendix 1: The Big 4 Retailers

## **PICK n PAY – Picking and choosing what laws to comply with...**

### **Key findings**

Pick n Pay is South Africa's second largest supermarket retail chain with more than 15% market share. It made a total trading profit of over R1 10 million in the 2013/14 financial year. As one of the biggest outlets for staple foods (maize and bread), the group has a responsibility to South African citizens regarding food safety and food security.

The African Centre for Biosafety tested Pick n Pay's white bread for GM content and discovered that of the soya used in making the bread, 42.81% is genetically modified. This is in contradiction to their commitment to complying with the Consumer Protection Act (2008), which states that all products containing ingredients with 5% or more genetically engineered content must be labelled.

Besides Pick n Pay's deliberate contravention of the law, there are health implications to consuming GM soya. GM soya crops are judiciously sprayed with a toxic herbicide called glyphosate and recent studies indicate that exposure to glyphosate residues contributes to chronic kidney disease in adults, neural tube defects in babies and spontaneous abortions in mothers, as well as birth defects in animals.<sup>93,94</sup>

### **Overview of company**

Pick n Pay Holdings Limited is the holding company for Pick n Pay Stores Limited. It is a JSE listed company and operates in the retail sector in South Africa, Namibia, Botswana, Zambia, Mozambique, Mauritius, Swaziland and Lesotho. This is South Africa's second largest supermarket retail chain with more than 15% market share. The group has 992 stores (107 were opened during the 2013 annual financial period)<sup>95</sup> and, according to a 2012 AMPS study, more than half of South Africans regularly shop at a Pick n Pay.<sup>96</sup>

Besides the primary focus on groceries, clothing and general merchandise, the company also operates other branded group activities,<sup>97</sup> such as property franchises, Go banking, Score Supermarket and TM Supermarkets (49% share in this Zimbabwean company).<sup>98,99</sup> Additional brands include Boxer.<sup>100</sup>

According to their website, Pick n Pay claims that "We are passionate about our customers and will fight for their rights".<sup>101</sup> In addition, they claim that: "The Group strives to address socio-economic challenges through the supply of high-quality, affordable food for all customers, while providing significant employment and economic opportunities across its value chain."<sup>102</sup>

### **Governance and financial information**

Total turnover as of February 2014 results is R63.1 billion with total trading profit of R1 010.3 million.<sup>103</sup> This was up from R808.9 million as of end February, 2013.<sup>104</sup>

Executive directors of Pick n Pay are CEO Richard Brasher, Richard van Rensburg, Aboubakar Jakoet, Jonathan Ackerman, Suzanne Ackerman-Berman and Gareth Ackerman (he is currently co-chairman of the Consumer Goods Forum, an international industry body).<sup>105</sup>

The group has a 3.76% Black ownership and 0.37% Black women ownership.<sup>106</sup>

### **Pick n Pay and sustainability**

Pick n Pay is a retail partner of the National Biodiversity and Business Network and says that it recognises the importance of biodiversity and its protection. "Our PnP teams also continue to invest time and effort in understanding and adapting our supply chain to climate change and increased ecosystem stress, which could impact our future ability to provide products to our customers".<sup>107</sup>

According to their Sustainable Living 2013 Report, the company has begun to trace ingredients with high environmental and social impacts, such as soya, to facilitate sustainable sourcing.<sup>108</sup>



<http://www.laluciamall.co.za/ShopCategory/4/Supermarket>

### **Pick n Pay's position on food labelling**

"We are committed to upholding the rights and interests of our customers. As a responsible company, we are also accountable for upholding the laws promulgated by the government of South Africa. In practice, this means we must engage with government and other retailers to establish nationwide standards for GMO labelling. We believe that a standard that applies to all retailers equally is the best way of empowering consumer choice."<sup>109</sup>

"Together with many other retailers and food producers, we support and are working towards transparency and accountability in the whole food value chain in SA."<sup>110</sup>

"Regulatory holdups are not an excuse for inaction. While these discussions are taking place, we are embarking on a process to label every single house brand in our stores which may contain GMOs. Where possible, GMOs will be avoided in our brands but where it is unavoidable, this new process will enable our customers to make an informed choice."<sup>111</sup>

"Our food safety standards apply to all products. Legally, all GMO ingredients in products sold in our stores must comply with the strict SA Genetically Modified Organisms Act."<sup>112</sup>

### **Pick n' Pay and genetically modified foods**

"Food safety is our number 1 concern. While Pick n Pay does not control how long it will take to arrive at a nationwide standard on GMO labelling, you can be assured that your health and safety is our key concern. Every single one of our PnP-branded suppliers were audited on food safety in 2012 and this remains an ongoing commitment. Our food safety standards apply to all products, including GMO maize and soy. Legally, all GMO ingredients in products sold in our stores must comply with the strict SA Genetically Modified Organisms Act..." Extracted from an official Pick n Pay statement on GMOs<sup>113</sup>.

### **Timeline history<sup>114</sup>**

- 1967: Raymond Ackerman acquires four small stores in Cape Town for R620 000.
- 1968: PnP goes public and lists on the JSE. In the first year of trading, it reaches a turnover of R5 million.
- 1976: Launch of the No Name brand.
- 1979: First PnP superstore opens.
- 1983: Turnover exceeds R1 billion.
- 1988: Opens its 100th store.
- 1993: Launches the Family Stores brand.
- 1994: Launches the Choice brand.

## SHOPRITE/CHECKERS – scorning SA's GM labelling laws

(All information used in this report, unless otherwise specified is from the official Shoprite Holdings website)

### Key findings

Shoprite Holdings is the African continent's biggest retailer with a turnover in the last six months of 2013 of R51 090 billion. They have enormous power when it comes to influencing farming and food systems and they acknowledge that, in rural Africa, "the Shoprite store may be the only store, resulting in a binary dependency by communities".<sup>115</sup> This enormous power must necessarily translate into enormous responsibility. Shoprite Holdings is committed to honouring the labelling requirements of the Consumer Protection Act, according to their 2013 Sustainability Report, stating that: "such products [containing GM ingredients] should be properly labelled to allow consumers to make informed choices".<sup>116</sup>

However, the African Centre for Biosafety's recent tests on leading bread brands for GM content shows that the soya component of Checkers' white bread has exceptionally high levels of GM content, at 91.09%. The bread is not labelled as required by law.

Besides the outright flouting of the Consumer Protection Act (2008), which mandates the labelling of products or components with 5% or more of GM content, there are health implications to consumption of GM soya. The accompanying chemical used with the crop is glyphosate and recent studies indicate that exposure to glyphosate residues is linked to chronic kidney disease in adults, neural tube defects in babies and spontaneous abortions in mothers, as well as birth defects in animals.<sup>117</sup> Through their Feeding Programme initiative, Shoprite gives bread to the poorest communities in South Africa.

The consolidated nature of South Africa's food chain is epitomised with Shoprite Holdings as Christo Wiese (the largest shareholder in the group) is also, through Brait SA, one of the largest shareholders in Premier Foods – one of the country's largest millers and producers of bread. Cross-ownership of the wheat-to-bread value chain (as well as the maize value chain) implies that the group has the power to influence food policy in South Africa.

### Overview of company<sup>118</sup>

Shoprite is Africa's largest food retailer – it operates 1 525 corporate and 377 franchise outlets in 16 countries across Africa and the Indian Ocean Islands. It is the 93rd biggest retailer in the world.

Shoprite Holdings Ltd comprises: Shoprite Checkers supermarket group (479 Shoprite supermarkets); 182 Checkers supermarkets; 30 Checkers Hypers; 320 Usave stores; 282 OK Furniture outlets; 21 OK Power Express stores; 47 House & Home stores; 163 Hungry Lion fast food outlets; 150 MediRite pharmacies and 220 LiquorShops. It also owns Computicket.

Through the OK Franchise Division, the group procures and distributes stock to 40 OK MiniMark convenience stores; 14 OK Foods supermarkets; 82 OK Grocer stores; 29 Megasave wholesale stores; 37 OK Value stores; 28 Enjoy stores; 60 Sentra stores and buying partners, as well as 77 Friendly supermarkets and 10 Friendly Liquor stores.

According to recent surveys, 70% of South Africans frequent the group's stores. The Checkers brand aims at the high-end (LSM 7-10) market, Shoprite at the broad middle to lower market, and Usave to the lower-end of the market.

The group employs more than 116 000 people, of which more than 14 000 work in stores outside of South Africa.

### Checkers brand

Shoprite acquired Checkers in 1991 and it is the second biggest brand in this sector of the South African retail market. Checkers operates throughout South Africa and in some neighbouring countries. The brand was separated from Shoprite in 2001 to improve the customer offering and the company. Currently there are 171 Checkers supermarkets with strong specialist departments, such as the bakery, butchery, Cheese World and delis, wine and coffee.

### Governance and financial issues

The company is listed on the JSE with secondary listings on the Namibian and Zambian stock exchanges. The Executive Directors of Shoprite Holdings are Chief Executive Officer – Dr. JW Basson, CG Goosen,

B Harisunker, AE Karp, EL Nel, and BR Weyers. Ownership rests with the shareholders.

Christo Wiese is chairperson and a non-executive director of Shoprite Holdings. He is also the largest individual shareholder with 15.01% ownership. Other shareholders are outlined in figure 1 below. Wiese is the chairperson of Pepkor Holdings, Tradehold Ltd and Invicta Holdings Ltd,<sup>119</sup> as well as being a non-executive director on the board of Brait SA and owning 18% shareholding in the company – he is the largest single private shareholder.

Brait Private Equity is the private equity arm of the South African Investment Bank. It is domiciled in Malta where foreign companies can claim up to 85% of the maximum tax rate back through various refunds. By 2013, Brait owned 70.9% of Premier Food (one of South Africa's big four bread companies), 37% of Pepkor and 18.7% of the UK supermarket group, Iceland.

Wiese sits on numerous corporate boards, such as Primedia and the PSG Group Ltd – a financial services firm. He has a net worth of \$3.1 billion according to Forbes' 2012 Billionaires List.

Shoprite Holdings reported turnover of R51 090 billion for the last six months of 2013.

### Shoprite and sustainability

According to their 2013 Sustainability Report, Shoprite's primary social objective is to provide their customers with the lowest food basket inflation. To this end, they "use their economic power in the service of the communities of Africa".<sup>120</sup>

They expand into underserved markets where the presence of a Shoprite store ensures the availability and reliability of food supply. "The reality of rural Africa is that the Shoprite store may be the only store, resulting in a binary dependency by communities. This is a significant responsibility to carry."<sup>121</sup>

One of the group's initiatives is the Feeding Programme, which distributes meals of nutritional soup and bread to the poorest communities in South Africa to alleviate the plight of especially children and senior citizens, as well as the thousands of families affected by job losses. There are currently 12 roaming soup kitchens and by 2012, 300 000 cups of soup with bread were distributed monthly.

### Shoprite's position on food labelling

According to their 2013 Sustainability Report, Shoprite Holdings is committed to honouring the labelling requirements of the Consumer Protection Act in all its supplier contracts and trade terms. Suppliers that are not compliant are required to provide a satisfactory rectification plan.<sup>122</sup>

### Shoprite and genetically modified foods

"The Shoprite group's position on products containing GM ingredients is that such products should be properly labelled to allow consumers to make informed choices. We will only stock products that are available in the market legally and in accordance with applicable labelling regulations. We are not in a position to do independent research or assessments into genetic modification, but we do keep abreast of developments in this regard through our membership of the Consumer

Figure 1: Shoprite Holdings Ltd and its Subsidiaries as at June 2013

BENEFICIAL SHAREHOLDERS HOLDING 1% OR MORE	No of Shares	%
Wiese, CH	85 627 398	15,01
Government Employees Pension Fund	63 171 399	11,07
Capital Group	60 255 194	10,56
Shoprite Checkers (Pty) Ltd	35 436 472	6,21
Lazard	22 810 777	4,00
JPMorgan	15 846 214	2,78
BlackRock	14 282 277	2,50
T. Rowe Price	14 052 968	2,46
Vanguard	12 698 733	2,23
Basson, JW	9 994 122	1,75
Le Roux, JF	7 434 585	1,30
Fidelity	6 863 340	1,20
First State Investments	6 036 327	1,06
Totals	354 509 806	62,13



Goods Council of South Africa's (CGCSA) Food Safety Initiative (FSI) that is actively involved in discussions with relevant stakeholders, including the industry and relevant government departments, about GM products and labelling regulations." <sup>123</sup>

### Supply chain

In countries outside of South Africa, Shoprite provides support and development programmes to assist small and local suppliers in meeting the group's standards and requirements.

The supply chain consists of strategically placed distribution centres linking the flow of product from vendors to stores. ICT infrastructure and a fleet of refrigerated and ambient trucks enable the movement of product and information. These trucks operate 24 hours a day, seven days a week.

It is the first South African retailer to receive the ISO 9002 accreditation for import and export handling. Centralised distribution offers the group a competitive advantage as does controlling the entire supply chain as cost-saving efficiencies can be introduced.

### Expansion into Africa

Shoprite Holdings is implementing a strategic expansion programme to maintain its position as the leading food retailer on the continent. According to its website, the company is positioned, through its links to Africa, to contribute to the nurturing of stable economies and social upliftment of the continent's people.

Over the past 17 years, Shoprite has expanded into 15 countries – Angola, Botswana, Ghana, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Nigeria, Swaziland, Tanzania, Uganda, Zambia and the Democratic Republic of the Congo.

### Timeline history

- 1979: The Shoprite Group started with purchase of OK Bazaars.  
Opened an outlet in Mozambique.
- 1983: Bought six food stores from Ackermans.



[http://www.mallguide.co.za/uploadimages/mall\\_108/DSCF4608.JPG](http://www.mallguide.co.za/uploadimages/mall_108/DSCF4608.JPG)

- 1986: Listed on the JSE Securities Exchange with a market capitalisation of R29 million.
- 1990: Opened in Namibia.  
Acquired Grand Bazaars.
- 1991: Acquired the Checkers chain.
- 1995: Opened its first store in Zambia.  
Acquired Sentra, a central buying organisation that acted as a buying group for 550 owner-manager supermarket members. This allowed Shoprite to enter the franchising field.
- 2000: Opened supermarkets in Zimbabwe and Uganda.
- 2001: Opened supermarkets in Egypt.  
Started operating in Malawi and Lesotho.
- 2002: Acquired the French-owned Champion supermarket group in Madagascar.  
Opened a supermarket in Mauritius.  
Acquired Score Supermarkets in Tanzania.  
Listed on the Namibian Stock Exchange.
- 2003: Listed on the Lusaka Stock Exchange.  
Opened stores in Ghana and Angola.  
Rolled out the Usave format.

2004: Started trading as a wholesale operation in India and franchised the first Shoprite Hyper in the country.

2005: Acquired Foodworld and Computicket.

Opened the first Shoprite Liquor Store.

Opened a supermarket in Nigeria.

2006: Divested from Egypt due to retailing restrictions.

2009: Acquired Transfarm, a pharmaceutical wholesale company.

2010: Divested from India.

2011: Acquired the franchise division of Metchash Trading Africa (Pty) Ltd.

2012: Opened a store in the Democratic Republic of the Congo.

2014: Deloitte's Global Powers of Retailing ranks the Shoprite Group as the 94th largest retailer in the world.

The group trades with 1 525 corporate and 377 franchise outlets in 16 countries across Africa and the Indian Ocean Islands. It has a total number of 1 902 stores and is worth about R82 billion.

## SPAR GROUP LTD – squeezing out smaller retailers

### Key findings

The Spar Group, although the smallest of South Africa's big four retailers (the others are Shoprite Holdings, Pick n Pay and Woolworths), has a 27.9% share of the food retail market and it operates in seven countries and is increasingly expanding into the township settlements of South Africa.

Township retail comprises thousands of home-based spaza shops or mini-retail outlets. These small and primarily informal businesses provide basic goods in small quantities to low-income consumers. The movement of large retailers, such as Spar into these markets threatens the livelihoods of thousands of spaza shop owners and increases the amount of money draining out of the local township economies.<sup>124</sup>

Despite its commitment to providing enough information to consumers to make informed choices as the food they buy and comply with relevant legislation (such as the Consumer Protection Act),<sup>125</sup> the group is not labelling its white bread as required by law. In fact, Spar provides no label of ingredients for its bread at all.

The recent tests for GM content in leading bread brands conducted by the ACB indicate that the soya content in Spar white bread is 72.69% GM. The Group claims to be waiting for clarity from government on the labelling laws as opposed to putting their customer's rights and health first.

Besides the blatant disregard for consumer rights that Spar is displaying, there are health implications in consumption of GM soya. Recent studies indicate that the residues of the chemical glyphosate (always used in GM soya cultivation) are linked to chronic kidney disease in adults, neural tube defects in babies and spontaneous abortions in mothers, as well as birth defects in animals.<sup>126</sup>

The implications of having toxic residues in South Africa's staple foods (maize and wheat) are dire, particularly as it is the country's poor most dependent on having healthy and safe bread.

### Overview of company

The SPAR Group Ltd is primarily a wholesaler and distributor of goods and services to the franchised stores that operate under its brand.<sup>127</sup> This virtually 100% franchise operation has 1 817 stores<sup>128</sup> (up from 783 in 2005<sup>129</sup>) and operates in seven southern African countries – South Africa, Botswana, Namibia, Zambia, Swaziland, Mozambique and Zimbabwe.<sup>130</sup> It is the smallest of the three major retailers listed on the JSE (Shoprite Holdings, Pick n Pay, Woolworths).<sup>131</sup>

The group caters to consumers across the socioeconomic spectrum<sup>132</sup> and has outlets in rural areas and increasingly, in townships.<sup>133</sup> Its share of the food retail market has increased from 25.9% in 2004 to 27.9% in 2009.<sup>134</sup> The group operates under 'voluntary trading' principles as individual stores may source goods from local traders, although they are encouraged to buy through Spar.<sup>135</sup>

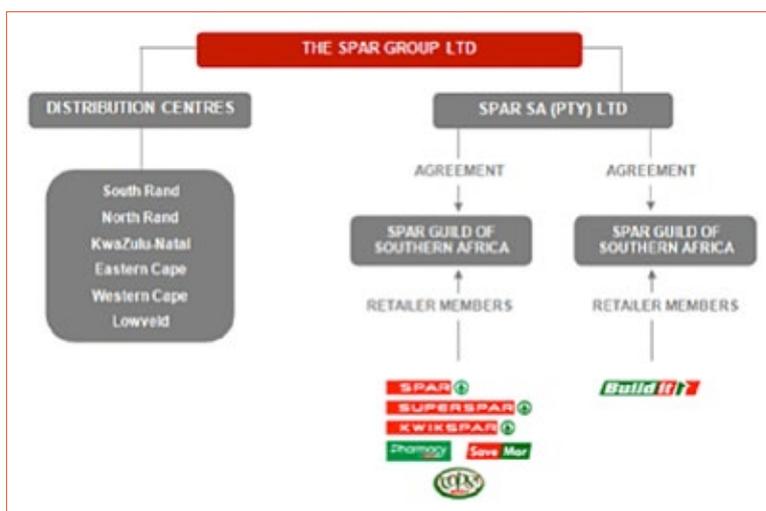
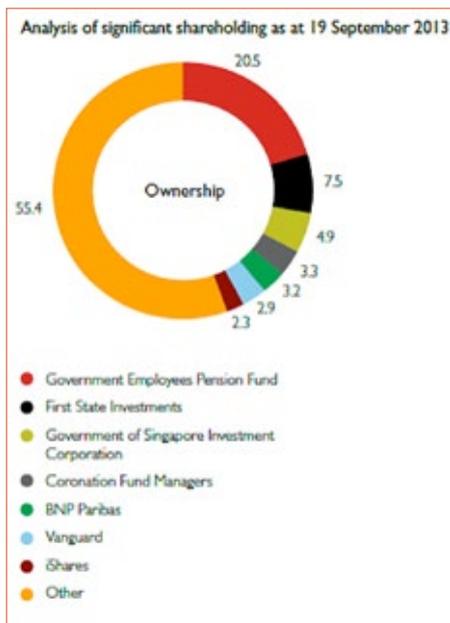
The business hinges on centralised distribution; SPAR owns seven distribution centres servicing retail stores in South Africa, Swaziland, Botswana, Lesotho, Mozambique, Zimbabwe and Namibia.<sup>136</sup> These centres handle 60% of the group's turnover with 40% delivered directly by suppliers to stores.<sup>137</sup> Brands include Superspar, SPAR, Kwikspar, SaveMor supermarkets, Build it, TOPS at SPAR and Pharmacy at SPAR.<sup>138</sup>

### Governance and financial information

SPAR listed on the JSE in 2004 and it has a broad range of shareholders – none of whom own more than 21% of the group – as of



<http://www.spar-international.com/media/80761/p21-1-SparExpressFassadeWattensoi-PP.jpg>



September 2013, close to 40% of SPAR shares were held offshore.<sup>139</sup> The SPAR Group LTD reported a 9.8% increase in turnover in 2013 totalling R58.5 billion with an operating profit, in 2013, of R1 650 million.<sup>140,141</sup> About 30% of this turnover is generated by the fresh food, butchery and bakery divisions of the stores.<sup>142</sup>

Executive directors are CEO Wayne Hook, Roelf Venter, Mark Godfrey and Kevin O'Brien.<sup>143</sup>

A breakdown of significant shareholding as of 2013 is indicated in the graph above.<sup>144</sup> The structure of the SPAR group is shown in the organogram above.<sup>145</sup>

### Spar and sustainability

According to their website and 2013 integrated annual report, SPAR is committed to reducing their direct environmental footprint and driving innovation in house brands, supporting suppliers and retailers to do the same.<sup>146</sup> They also aim to raise awareness around environmental sustainability with their customers.<sup>147</sup>

The group has developed a nutritional strategy to ensure fortification of basic foods for low LSM groups and to raise awareness in consumers around nutritional issues.<sup>148</sup> Core principles of its sustainability strategy include providing enough information to enable consumers to make informed choices and ensuring compliance with legislation at all times.<sup>149</sup>

### Spar and genetically modified foods

Spar has no specific policy for or against GMO content in food and note that it is the customers right to decide. When asked about labelling so that the customer could make an informed decision, the response was that SPAR had started labelling their own brands and would comply with the labelling regulations as soon as there was clarity from government.<sup>150</sup>

### Timeline history<sup>151</sup>

The Spar organisation was created in the Netherlands in 1932 by Adriaan van Well who united independent wholesalers and retailers to counter the increasing power of grocery chains.<sup>152</sup> The international SPAR group operates in 33 countries across five continents and has about 12 000 stores.<sup>153</sup>

- 1962: Six wholesalers gained the exclusive rights to use the SPAR brand in South Africa
- 1963: SPAR SA (Pty) Ltd launched
- 1970: Stores split into SPAR foodmarkets and SPAR foodliners
- 1978: Tiger Oats acquires SPAR Western Cape and SPAR Southern Transvaal

The Brown Group created through a merger of a number of wholesalers

Tiger Oats gains a 30% shareholding in the group

- 1984: Build it stores are launched
- 1988: Tiger Brands acquires the entire shareholding of the Brown Group<sup>154</sup>
- 1991: The Brown Group changes its name to the SPAR Group Limited
- 1990: Kwikspar stores are introduced
- 1991: East Rand distribution centre is opened  
Stores reallocated into three regions – East Rand, Northern Transvaal and West Rand
- 1993: Opened in Port Elizabeth
- 2000: Wine departments expanded into TOPS at SPAR
- 1998: Superspar stores are launched
- 2004: The SPAR Group Limited is unbundled from Tiger Brands Limited and listed on the JSE
- 2011: Pharmacy at SPAR stores are launched
- 2012: SPAR International grants SPAR SA the licence for Mozambique



## **WOOLWORTHS – Woollies lies on its labels...**

### **Key findings**

Woolworths' reputation is based on its quality offering and commitment to customer service. Despite its numerous awards for sustainable initiatives and ethos of doing good for people, planet and profit, the company has blatantly disregarded its legal commitment to label the GM content in its products.

In 1999, Woolworths committed to eliminating genetically modified ingredients in home brands and clearly label those it could not replace. However, according to tests done by ACB, the soya content of Woolworth's white bread comprises 85.62% GM soya. The GM soya content is not identified on the packaging and this is a violation of the Consumer Protection Act (2008). The Act mandates that all products or components of products that contain 5% or more of genetically modified content must be labelled.

Besides the outright flouting of consumer's rights to know if their food contains genetically modified ingredients, there are health implications to consumption of GM soya. The accompanying chemical used with the crop is glyphosate and recent studies indicate that exposure to glyphosate residues is linked to chronic kidney disease in adults, neural tube defects in babies and spontaneous abortions in mothers, as well as birth defects in animals.<sup>155</sup>

### **Overview of company**

Woolworths is one of the country's leading retail chains with more than 400 stores throughout Africa and into the Middle East;<sup>156</sup> this includes 295 stores and 145 franchise stores across 18 countries.<sup>157</sup> The company also owns a major share in the Australian retail chain, Country Road. It is one of the top 100 companies listed on the JSE<sup>158</sup> and it boasts with an 11% share of the country's retail market.<sup>159</sup> Woolworths is the 222nd largest retailer in the world.<sup>160</sup> Besides food, clothing and general merchandise, the company also provides a variety of retail and financial services.

Woolworth's reputation is based on its quality offerings and customer-centric retail

approach. It was the first South African retailer to introduce 'sell by' dates on its food in 1974 and the brand has been awarded the title of International Responsible Retailer three times in the 21st century for its contribution and commitment to sustainability - sustainable agriculture in particular.<sup>161</sup> Woolworths regularly wins awards for its responsible retailing ethos and its sustainability principles. It was recognized by Forbes magazine as one of the ten most innovative African companies in 2012.<sup>162</sup>

### **Governance and financial information**

The Group has 11 non-executive directors and three executive directors. The Chairman, Susan Susman, is a non-independent director. The Board is responsible for adopting strategic plans and monitoring of operational performance. Their stated responsibilities include ensuring that "the company acts responsibly to all stakeholders including customers, employees, suppliers, franchises, shareholders, government and local communities..." and that "all relevant laws, regulations and accounting principles are complied with".<sup>163</sup>

Woolworths Holdings Limited has two subsidiary companies – Woolworths and Country Road. In addition, it has interests in Woolworths Financial Services in a joint venture with the Barclays Africa Group.<sup>164</sup> They also operate in Engen Foodstops.

Woolworth's turnover for 2012 was R27.7 billion – R17.2 billion of this was made up by food sales.<sup>165</sup> By June 2013, the Group posted gross profits of R13 553 million, an increase of 27.1%.<sup>166</sup> The contribution of Woolworths' food divisions is 49.6% of turnover.<sup>167</sup>

### **Woolworths and sustainability**

The company is dedicated to "growth through responsible retail".<sup>168</sup> According to its website, it "devotes a significant amount of its energy and resources to ensure sustainable development within the context of the changing social and environmental needs of South Africa. It has a five-year plan with targets related to sustainable growth."<sup>169</sup>

Initiatives include the Farming for the Future programme, part of the Group's contribution to



building food security in the country.<sup>170</sup> And the Group claims that, “Sustainability is entrenched in the WHL Group’s culture and core...”<sup>171</sup>

They report a sustainability measurement score of 90% for 2013 which encompasses the claim that 57.4% of food products have a sustainability attribute.<sup>172</sup>

### **Woolworths’ position on labelling**

Woolworths is committed to complying with all relevant legislation, including the Consumer Protection Act of 2008.

### **Woolworths and genetically modified foods**

“We understand consumer concerns around GM Foods and so we have undertaken to eliminate genetically modified ingredients wherever possible and work hand-in-hand with our suppliers to do so. We undertake to clearly label those remaining products that contain ingredients from crops which have been genetically modified, so that consumers can make informed choices when shopping. [In addition] Woolworths will remove, replace or label ingredients from genetically modified (GM) crops in all Woolworth’s own brand products.” Woolworths GM Policy 1996.

The company was in the media spotlight in 2012 when ACB released its findings that Woolworth’s Super Maize meal contained 79.78% GM maize content, labelled as “may be genetically modified”.<sup>173</sup>

The company has been a strong supporter of the “May Contain Genetically Modified Organisms” label. However, this label is only allowed in South Africa under current labelling laws if it is financially or scientifically unfeasible to test. This is not the case in South Africa, as the African Centre for Biosafety regularly proves with its testing of consumer goods. In addition, it is highly misleading to use a “May Contain Genetically Modified Organisms” label on a maize-based product when almost 90% of the maize production in South Africa is genetically modified and therefore highly likely that the product



<http://www.globalstorefocus.com/1011/gifs/2Storya.jpg>

contains over 5% GM content. The “May Contain Genetically Modified Organisms” label absolves companies, such as Woolworths, of their responsibility to test and verify their source ingredients and it is suitably vague so as not to cause consumer alarm.

In response to letters by Grass Consumer Action in 2012, Woolworths replied that: “We do NOT believe it is about the testing of protein present in the final product. Most processed foods CANNOT be tested for the presence of GM protein as processing will ‘remove these proteins.’”<sup>174</sup> However, ACB has tested Woolworth’s bread and maize products and it is quite feasible to measure the amount of GM content present in ingredients within a product.

### **Timeline history<sup>175</sup>**

- 1931: Max Sonnenberg opened the doors of the first store in Cape Town
- 1934: Opened a store in Durban
- 1935: Opened stores in Port Elizabeth and Johannesburg
- 1974: First South African retailer to introduce “sell-by” date on food packaging
- 1997: Listed on the JSE
- 2007: Launched the Good Business Journey
- 2014: Owns over 400 (including franchised) stores in 18 countries.

# Appendix 2: The Big 3 Bakers and Millers

## **TIGER BRANDS – in the GM spotlight again**

### **Key findings**

Tiger Brands controls 25% of the South African bread market and thus plays an important role in food security, given the reliance on bread as a staple food, particularly for the country's poorer households.

The company has been previously exposed by ACB for not labelling the high GM content in their range of Purity baby food. Public pressure forced the company into sourcing non-GM maize for this range, but they have refused for their other maize-based products.

ACB's tests of Tiger Brands' white bread indicate that 23.23% of the soya used in the bread is genetically modified. It is not labelled as required by law. Tiger Brands is in contravention of the Consumer Rights Act (2008), which mandates that all products or components of products that contain 5% or more of genetically modified content must be labelled as such.

Besides the blatant disrespect for consumer's rights displayed by Tiger Brands, they place their customers at risk as exposure to glyphosate residue, the chemical used for GM soya production, has been linked to chronic kidney disease in adults, neural tube defects in babies and spontaneous abortions in mothers, as well as birth defects in animals.<sup>176</sup>

Tiger Brands' actions contradict its CEO's statement that the group is "committed to the highest standard of social and business conduct..."<sup>177</sup> as well as negating its commitment to compliance with the Consumer Protection Act, as outlined in its 2013 Integrated Annual Report.<sup>178</sup>

### **Overview of company**

Tiger Brands operates in South Africa's grain sector, as well as having divisions focused on consumer brands and exports. The company is considered the country's largest fast-moving

consumer goods company and its brands account for nearly 15% of goods sold at major retailers. Its Albany bread brand is the leading bread brand in the South African market.

### **Governance and financial information**

Tiger Brands is owned by the Public Investment Corporation (10.1%), pension funds 23%, unit trusts and mutual funds (15%), other managed funds (12.8%), and black economic empowerment shares (11.2). No individual shareholder owns more than 15% of the company; however, 50.1% of shareholders do not reside in South Africa.

Tiger Brands has the most extensive African footprint in more than 22 African countries with the intention to increase their turnover from international business to at least 30% of total net sales by 2017. The primary listing is on the JSE, but it is also traded on the Frankfurt and Berlin Stock Exchanges, the German Composite, the Grey Market and the PTC Pink.

Tiger Brands controls 25% of the South African bread market. Bread falls within the grain division, which encompasses milling, baking and breakfast meals. This division, according to their 2013 Integrated Annual Report, contributed 53.1% to an operating profit in 2013 of R3.1 billion.<sup>179</sup>

### **Tiger brands position on labelling**

According to Tiger Brand's Chief Executive Officer, Peter Matlare, the group is "committed to the highest standard of social and business conduct, which is underpinned by a set of values and principles"; these values include "acting responsibly to society".<sup>180</sup>

According to the 2013 Integrated Annual Report, the group is committed to complying with the Consumer Protection Act and relevant legislation and regulations relating to consumers.<sup>181</sup>

### **Tiger Brands and genetically modified foods**

Tiger Brands was exposed in 2013 by the ACB for not labelling the GM content of their Purity baby food range. Purity's Baby's First contained 56.25% GM maize, while the Purity Cream of Maize contained 71.47% GM maize. Neither of these products was labelled, as required by the Consumer Protection Act. Following public pressure, the company announced their intent



to source non-GM maize for their Purity range, but not for the other products on their shelves, such as Ace super maize meal, maize rice, instant porridge, samp and beans and energy cereal.

Recent tests conducted by ACB indicate that Tiger Brands Albany White Superior bread contains soya, of which 23.23% is genetically modified.

### **Timeline history**<sup>182</sup>

1920: Jacob Frankel established the company with funding from Joffe Marks.

1925: Launched the Jungle Oats Brand.

1944: Incorporated with the National Milling Company Limited and listed on the JSE.

1982: Acquired by Barlow Rand (now Barlow World).

Barlow World acquired the Spar group in 1988.

1993: Was unbundled from the Barlow Group.

During this period, Tiger Brands acquired Adcock Ingram, the pharmaceutical

group, although it was unbundled between 2004 and 2008.

2003: Acquired the remaining 50% shareholding of Enterprise Foods from Foodcorp.

Tiger Brands has also acquired Langeberg & Ashton Foods, one of the world's largest global fruit companies.

2008: Acquired 51% of Kenya-based Haco Industries.

In the same year, it acquired 74.7% in Chococam Cameroon, 49% in UAC Nigeria.

2011: Acquired 100% of Deli Foods, Nigeria and 51% of the East African Group.

The joint venture is called East Africa Tiger Brands.

2012: Acquired 60% of Dangote Flour Mills.

It has also invested in Chile and Peru through partnering with EmpresasCarozzi.



## **PIONEER FOODS – Perhaps pioneering a GM-free future for South Africa?**

### **Key findings**

Pioneer Foods owns 27% of South Africa's bread market and is a dominant player in both the milling and baking sectors. Along with the other bread giants, Premier Foods and Tiger Brands, the company colluded in 2006 to raise the price of bread by 30-35 cents a week before Christmas.<sup>183</sup>

While Pioneer Foods has been in the GM spotlight before with ACB's exposure of the company's non-compliance with labelling laws for its GM-laden White Star Super Maize Meal, it is the only bread brand (Sasko White Bread), out of those tested by ACB in 2014, that has such low levels of GM content in the soya content of its bread, it cannot be quantified.

Tests commissioned by the ACB into Pioneer's White Star maize in October 2013 and March 2014 showed that the GM content of the maize dropped from 72.04% to 47.7%. Is Pioneer trying to avoid GM ingredients in its food products?

### **Overview of company**

Pioneer Foods operates primarily in the maize market. It owns three maize mills and owns many of the country's maize brands.<sup>184</sup> It operates in more than 80 countries around the world. Its core business is production, distribution, marketing and selling of a diverse range of food, beverages and related products.

### **Governance and financial information**

Just below 15% of shares are held by the company itself. The largest investor is the former agricultural cooperative – KaapAgri that has a 30.7% 'economic interest' in the company through an unlisted holding company, Agri-Voedsel.

Agri-Voedsel resulted from internal restructuring of KaapAgri. 44.7% of Agri-Voedsel is owned by Zeder Investments Limited, which houses all of the agribusiness investments of the PSG Group Limited. This group also owns 28.5% of Capitec Bank and 37.1% in Cape Span.

Pioneer's Bokomo division holds 30% of the South African cereal market, the country's

largest commercial egg enterprise and Ceres beverages. Pioneer itself has a 49.9% share in Heinz South Africa.

According to Pioneer Food's 2013 Integrated Annual Report, the company made R20.6 billion turnover in the financial year, recording R1,271 billion in profit. Sasko, the bread division, contributed R825 million to this profit.<sup>185</sup>

The company claims that bread is a low-profit business with expected returns of between 2-4%, but published financial statements indicate higher profit margins in their milling and baking divisions, than in the remainder of their divisions.<sup>186</sup> Pioneer's milling and baking division achieved a 9.5% profit margin compared to an overall margin of 6.2%.<sup>187</sup>

### **Pioneer foods position on labelling**

Pioneer Foods, according to the 2013 Integrated Annual Report is committed to sustainable agricultural practices and an inclusive stakeholder approach recognising that the company has social, economic and environmental responsibilities.<sup>188</sup> One of the principles outlined is compliance with laws and regulations as well as open and honest communication.<sup>189</sup> Its stance on consumer relations emphasises that consumers are "increasingly concerned about the environmental and social performance of companies and these concerns drive their spending patterns".<sup>190</sup> This trend encompasses issues such as genetically modified food and food labelling.

### **Pioneer Foods and genetically modified food**

ACB exposed the high level of GM content in Pioneer's White Star Super Maize Meal in October 2013, which was labelled "produced using genetic modification". According to the privacy policy outline on their Pronutro site, Pioneer, while stating that it will consider the responsible use of GM raw materials and their application in food, also commits to "strictly adhering to labelling regulations, providing consumers with information as required".

More recent tests conducted on Pioneer's Sasko white bread indicate very low levels of GM soya.



## Timeline history<sup>191</sup>

1912: A group of farmers formed the Wesgraan Cooperative in Malmesbury.

1920: Established a milling company to mill wheat.

This company was the first of its kind in the country and called Bokomo.

The Great Depression and droughts in the Cape caused threatened wheat farmers to band together and form the Suid-Afrikaanse Sentrale Ko-operatiewe Graanmaatskappy Beperk (SASKO) to sell wheat centrally for cooperatives.

Sasko expanded into wheat milling in 1934.

1942: Sasko shareholders acquired 27% in Bokomo; however, this was cancelled in 1948.

Only 25 years later would the two cooperatives come together again to form the Sasko-Bokomo Central Cooperative in 1973.

1996: Bokomo converted from a cooperative to a private company.

1997: Bokomo merges with SASKO to form Pioneer Foods.

2002: Acquired SAD Holdings increasing its share of the cereal market to 44%.

2004: Acquired John Moir's (a division of Bromor Foods), Golden Lay Farms, Golden Lay Foods and Accolade Trading.

It also has full shareholding in Bokomo operations in Zambia and Uganda and 50% shareholding in Bokomo operations in Namibia and Botswana.



## PREMIER FOODS

### Key findings

Premier Foods controls 14% of South Africa's bread market and it has significant exposure to the country's informal market, which is responsible for 60% of bread purchases.<sup>192</sup> It also effectively dominates Swaziland's bread market.

The company was found guilty in 2007 of colluding with other dominant plant bakeries – Tiger Brands and Pioneer Foods – to raise the price of bread by 30-35 cents a week before Christmas in 2006.<sup>193</sup> In 2013, ACB exposed their lack of compliance with the Consumer Protection Act (2008), which mandates the labelling of any foodstuff or component thereof that has a GM content of 5% or more. The company's Impala Maize Meal contained 66.18% GM maize meal content.<sup>194</sup> It was not labelled as required by law

Recent tests by ACB indicate that of the overall soya used in making of Premier's Blue Ribbon white bread, 64.9% is genetically modified. Premier Foods is again in violation of South Africa's Consumer Protection Act, which mandates the labelling of all GM content that is 5% or more.

### Overview of company

Premier Foods operates in South Africa's bread and confectionary chain. The company operates 11 bakeries, 5 wheat mills, 1 maize mill and 16 distribution depots and it delivers daily to 28 000 customers through an independent network using more than 900 trucks. Premier Foods is the largest maize milling operation in the world with a capacity of delivering 1 720 maize meals per day.

Its main business activities comprise milling, marketing, selling and distribution of branded maize and flour products, including bread. Its leading brand is Blue Ribbon bread.

### Governance and financial information

Premier Food's Blue Ribbon brand held a 14% share of the bread market in 2013.<sup>195</sup> Brait SA (of which Christo Wiese, the largest shareholder of Shoprite/Checkers, is the largest private shareholder) owns 79.9% of Premier Foods.

Premier also effectively controls 75% of Swaziland's break markets through controlling stakes in the country's two biggest bakeries. This control also allows for distribution into Botswana and Mozambique. Through its acquisition of Manhattan's business from Kraft Foods, the company accesses manufacturing plants in Botswana, Kenya and Namibia.

### Premier's position on labelling

As indicated in the image below, following the passing of the Consumer Protection Act, Premier changed some of their labels to make sure that "you [the consumer] know exactly what is inside the food you buy".<sup>196</sup>



### Premier Foods and genetically modified food

The African Centre for Biosafety tested Premier's Blue Ribbon White Bread for GM content and discovered that of the overall soya used in making the bread, 64.9% is genetically modified. This is in contradiction to their commitment to complying with the Consumer Protection Act (2008), which states that all products containing ingredients with 5% or more genetically engineered content must be labelled.

## Timeline history

Premier Food traces its history back to 1882 with the formation of the Port Elizabeth Steam Mill Company, which in 1884 registered the Snowflake brand. The timeline below depicts the numerous changes in ownership of Premier Food.

1891: Merged with Cape Town's Attwell's Bakery to form the South African Milling Company Limited (SAMCO).

1909: Expanded its distribution network.

The company purchased an iron steamboat that travelled from Cape Town up the coast to Walvis Bay and by purchasing South Africa's first delivery truck.

1964: Merged with Premier Milling.

It continued expanding building a wheat and maize mill in other locations.

1998: Was purchased by General Food Industries and merged to create Premier Foods Limited.

Following economic liberalisation in the 1990s in South Africa, Premier has been taken over and restructured several times.

2001: Fabvest Investment Holdings (the investment arm of the Foundation for African Business and Consumer Services, acquired a 73% stake in Premier.

Following poor financial performance in that period, the company was restructured into a joint venture company – Fabcos Established Investment – with 55% of shares held by Fabcos and 45% by Nedbank.

2005: Fabcos able to repurchase the 45% shareholding from Nedbank.

During this process, Premier became the largest black-owned company in South Africa.

2007: Fabcos sold its interest to Brait Private Equity (the private equity arm of the South African Investment Bank, Brait).

Brait is listed first on the Euro MTF market in Luxemburg, which is a jurisdiction ranked third in the Tax Justice Network's financial secrecy index for 2011.

Brait has a secondary listing on the JSE and operates in South Africa and Mauritius.

2011: Brait re-domiciled from Luxemburg to Malta.

Foreign companies domiciled in Malta can claim up to 85% of the maximum tax rate of 35% back through various refunds.

2012: Premier acquired controlling stakes in Mr Bread and Swaziland United Bakeries, both in Swaziland.

These two companies control 75% of Swaziland's bread market.

It provides for distribution channels into Botswana and Mozambique.

2013: Brait holds 79.9% shareholding in Premier Food.

It also owns 37% of Pepkor and 18.7% of the UK supermarket group, Iceland.

The chairman and controlling shareholder of Shoprite holdings, Christo Weise, has an 18% shareholding in Brait – he is the largest single shareholder.

Premier Foods acquired Manhattan's business from Kraft Foods.

Manhattan's has manufacturing plants in Port Elizabeth, Botswana, Swaziland, Kenya, Johannesburg and Namibia.

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