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For attention: Mr John Davies and Ms Adrie El Mohamadi

September 2011

The South African Institute of Foundrymen (SAIF)

and

National Foundry Technology Network (NFTN)

Dear John and Adrie

Please find attached hereunder our SAIF / NFTN industry RPL survey report.

As you may recall, the final part of the project is for us to present the survey results to a suitable industry forum. We would however be happy to have a meeting with yourselves beforehand to make any changes to the report that you may think necessary.

Hope to hear from you soon!

Johan Els / Erica Botha

Table of Contents

1 PROJECT OBJECTIVES	3
2 PROJECT METHODOLOGY	3
3 FINDINGS	4
3.1 Participation of companies in the survey	4
3.2 Trade focus.....	6
3.3 Trades – Regional focus	7
3.4 Assessor training	7
3.5 Assessors – Regional focus.....	8
3.6 Industry demographics.....	9
3.7 Demographics per designation.....	9
4 CONCLUSION	11
5 RECOMMENDATIONS	12
5.1 Phase 2: Broaden assessor/moderator base;	Error! Bookmark not defined.
5.2 Phase 3: RPL field work:.....	Error! Bookmark not defined.
5.3 Phase 4: Industry roll-out;	Error! Bookmark not defined.
ANNEXURE 1: FOUNDRY RPL NEEDS ANALYSIS PROJECT QUESTIONNAIRE RESOURCES	13
ANNEXURE 2: RAW DATA	16

1 PROJECT OBJECTIVES

A desktop needs analysis has been conducted as phase one of a potential RPL project for the foundry industry.

Intertrain together with Sparrow Consulting were commissioned by the SAIF and NFTN to conduct a research project with the following objectives:

- ✓ Determine the need for Recognition of Prior Learning (RPL) in the following foundry designations: moulders, melters and patternmakers;
- ✓ Establish the demographics and age profiles of the existing industry skills base;
- ✓ Establish the current profile and future growth forecasts of each vocation (to determine the training needs for each vocation);
- ✓ Determine the assessor capacity within the above fields.

2 PROJECT METHODOLOGY

- ✓ Our research team obtained an initial contact list from the SAIF. The list was verified and updated before commencing with the research. Although every reasonable effort was made to get into contact with each of the foundries on the list, a considerable number of the companies had changed names, numbers or closed down their operations.
- ✓ Once the list was “cleaned out”, foundries were phoned and given a brief overview of the project. They were asked to indicate a preferred contact person who would be able to supply us with training information and demographics of their melters, moulders and patternmakers.
- ✓ A draft questionnaire was compiled and SAIF comments were incorporated into a final questionnaire (see Annexure 1).
- ✓ An interactive electronic questionnaire was designed and circulated to a pilot group of ten respondents. Four of these respondents were unable to answer the questionnaire due to electronic security blockage or their mail settings. Although these problems could be solved in a reasonable time, it was felt that the number of rejections would be a major stumbling block in the information gathering process.
- ✓ A simplified text questionnaire was designed to replace the interactive version and e-mailed to all the relevant foundry contacts for completion and return.

- ✓ The mailing was followed up with a considerable telephonic follow-up effort and several additional rounds of additional mailings.
- ✓ Although we are convinced that some personal contact would have delivered even better results, we were still pleased to find that a good number of foundries responded to the questionnaire; many of whom indicated their interest to partake in the RPL intervention.

3 FINDINGS

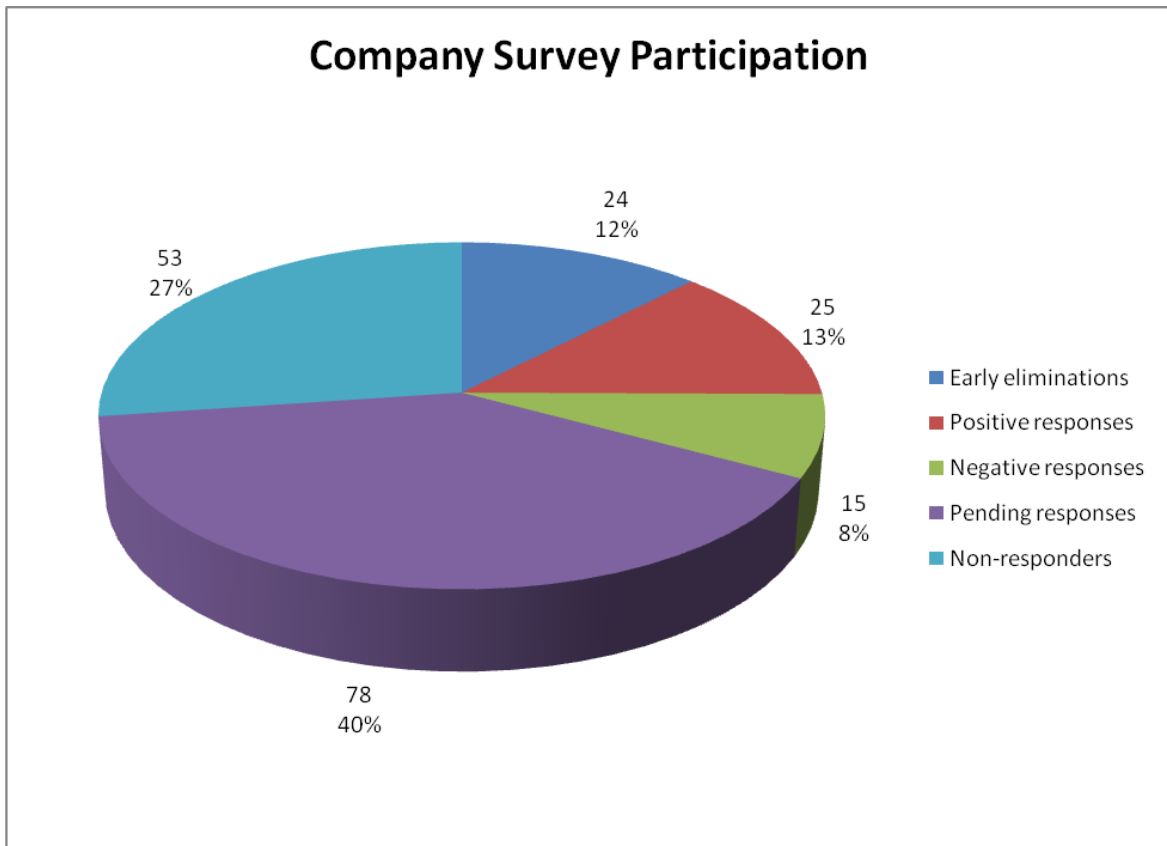
Our key findings are summarised in the following paragraphs. Note that all source documents for these findings are available for verification.

3.1 Participation of companies in the survey

The responses of all companies targeted in the survey were tracked and divided into five groups:

- ✓ Companies who indicated that they were not interested in participating in the project during our initial telephonic contact – no questionnaires were circulated to these companies
- ✓ Companies who responded positively to the questionnaire
- ✓ Companies who responded negatively to the questionnaire
- ✓ Companies who indicated their willingness to respond, but responses are still pending
- ✓ Companies were eliminated at a later stage of the survey due to a lack of responsiveness to our requests, our inability to contact the responsible individual or our research uncovering new company information, e.g. company out of business, stopped manufacturing, importing from an overseas partner, pressure die castings, etc.

The following graph shows the statistics for each of these groups:



The following are worth noting from these statistics:

Some 21% of all the *initially targeted* 195 companies responded in writing to the survey. In terms of the 5% response rate often quoted as the benchmark for surveys, this number is a good indication that the target population was properly engaged in the survey.

The 24 early eliminations consist of those companies who indicated their non-participation as early as during the initial telephonic contact. Although reasons were not always supplied, work pressure, small workforce, owner expertise, own training, no prospective apprentices were typical reasons supplied for not being interested in the RPL project.

The 25 companies who indicated their interest in participating in an RPL project is a very positive result and as we will show later in the report, a strong indication of the industry's interest and need for an RPL intervention. Behind these responses one finds a very positive attitude and an interest in training and the development of human resources.

As one may hope, the 8% negative response also includes a fair number of practical considerations in addition to the outright non-interested parties. Those in the research fraternity will never neglect to point out that all amicable negative responses should be counted as a vote of confidence in the research organisation (SAIF in this case)!

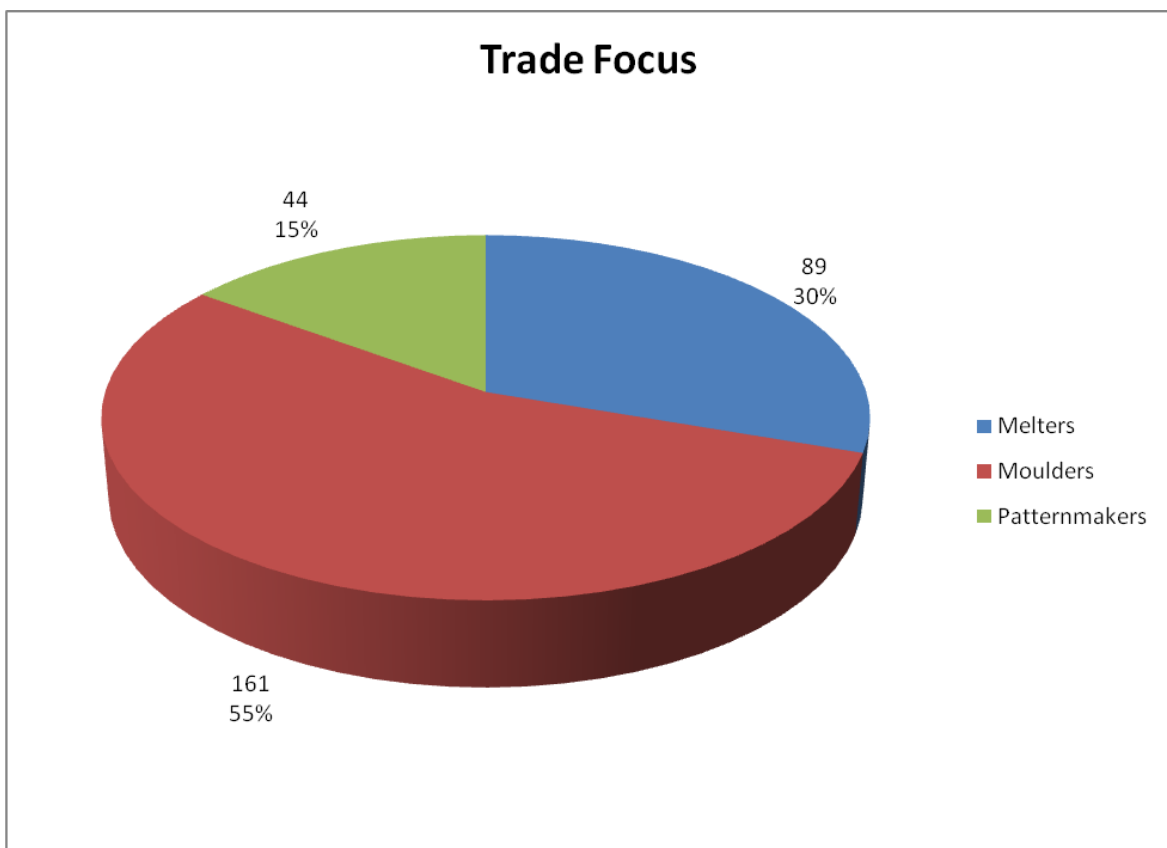
A considerable number of companies (78) are listed as pending, placing them in the category that could still be engaged if a further need exists. Since quite a few prominent

foundries fall in this category, it would be possible to further increase the response rate (and hopefully participation) through personal approaches. One must however bear in mind that many falling in the “pending” category do so because they see this project as a lower priority than those who took the trouble to respond.

Only a small portion of the 27% non-responders was never telephonically engaged and therefore their receipt of our questionnaire could not be verified.

3.2 Trade focus

As can be seen in the following chart, the positive responses were broken down into the three functional groups, namely melters, moulders and patternmakers.



This graph probably indicates the most important finding of this survey: companies would like nearly 300 of their employees to be given the opportunity to do an RPL assessment. This is far in excess of the initial number of 100 – 150 indicated as the threshold to make this project feasible.

The general distribution between the different trades is probably what one should expect based on general foundry workforce demographics. Here it is important to note that even the smallest grouping, namely patternmakers, indicates sufficient numbers (44) to warrant consideration of an RPL intervention.

3.3 Trades – Regional focus

Although the general interest in RPL is important, the practicality of implementation very much depends on the regional focus of the participants. Foundries were therefore separated into regions to determine whether there is sufficient concentration to address the needs.

The following table shows the provincial distribution of interested foundries:

Region	Foundries	Percentage
Free State	3	12%
Gauteng Province	12	48%
Kwazulu Natal	5	20%
Mpumalanga	2	8%
North West	1	4%
Western Cape	2	8%
Total	25	100%

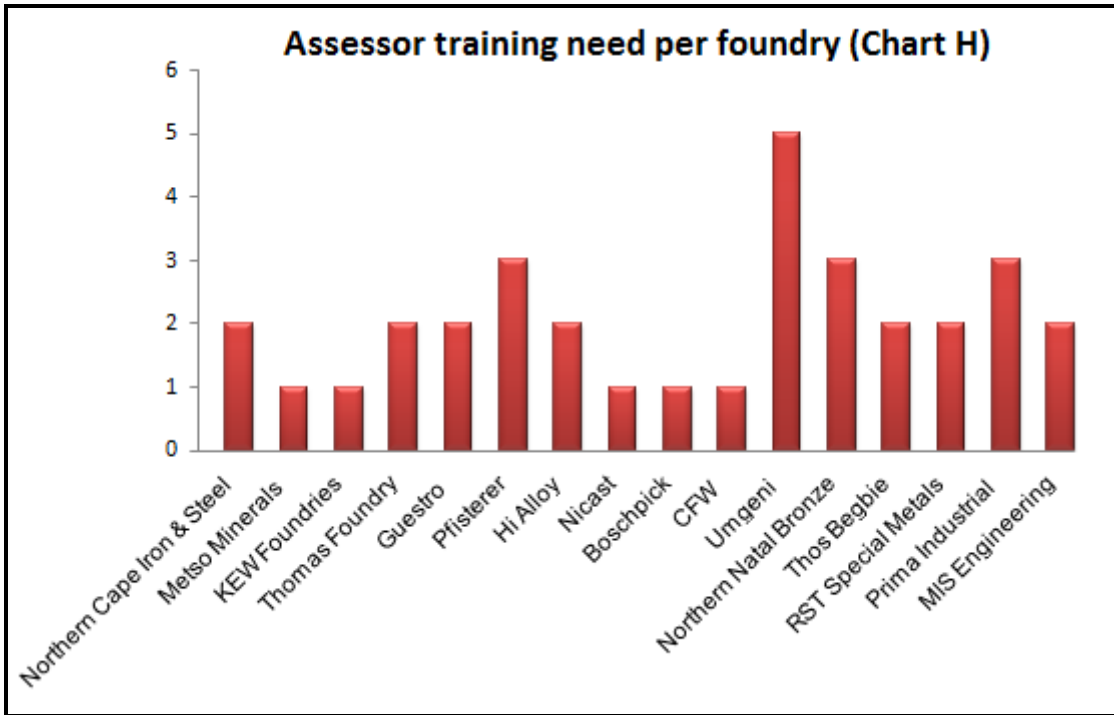
From the table it is evident that Gauteng and KwaZulu Natal should be our first priorities with nearly 70% of the foundries being located there. The number of foundries in these regions will make it possible to conduct some of the sessions in a group, whereas individual sessions would be required for foundries within the other provinces.

A surprising result is that the Western Cape only has two foundries interested in an RPL assessment.

3.4 Assessor training

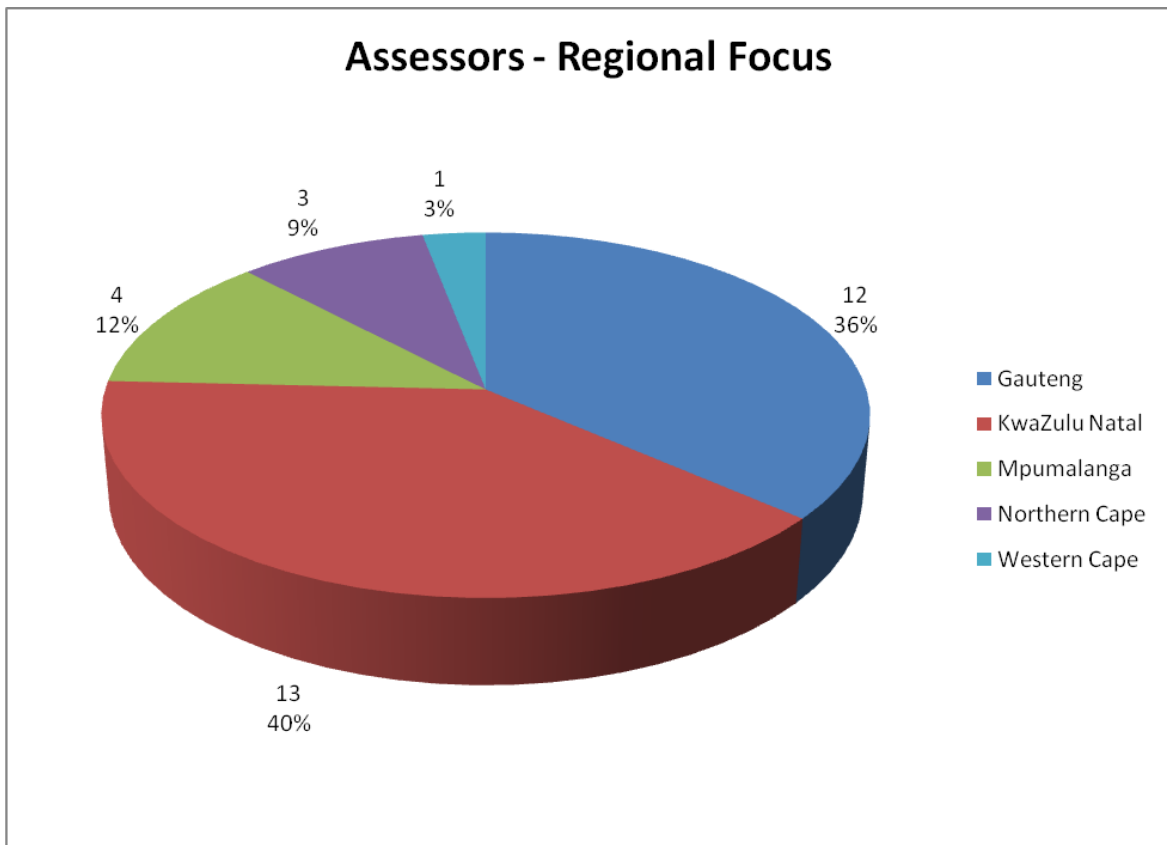
The training of industry experts (experienced artisans) as assessors is an essential component in the process of recognising subsequent learners for their skills and knowledge. Experienced artisans also need to complete the assessment successfully before a foundry can have any expectation that learners will be trained and assessed by more experienced individuals.

Each of the foundries in the following chart indicated that they wish to train their experienced melters, moulders and patternmakers as assessors.



3.5 Assessors – Regional focus

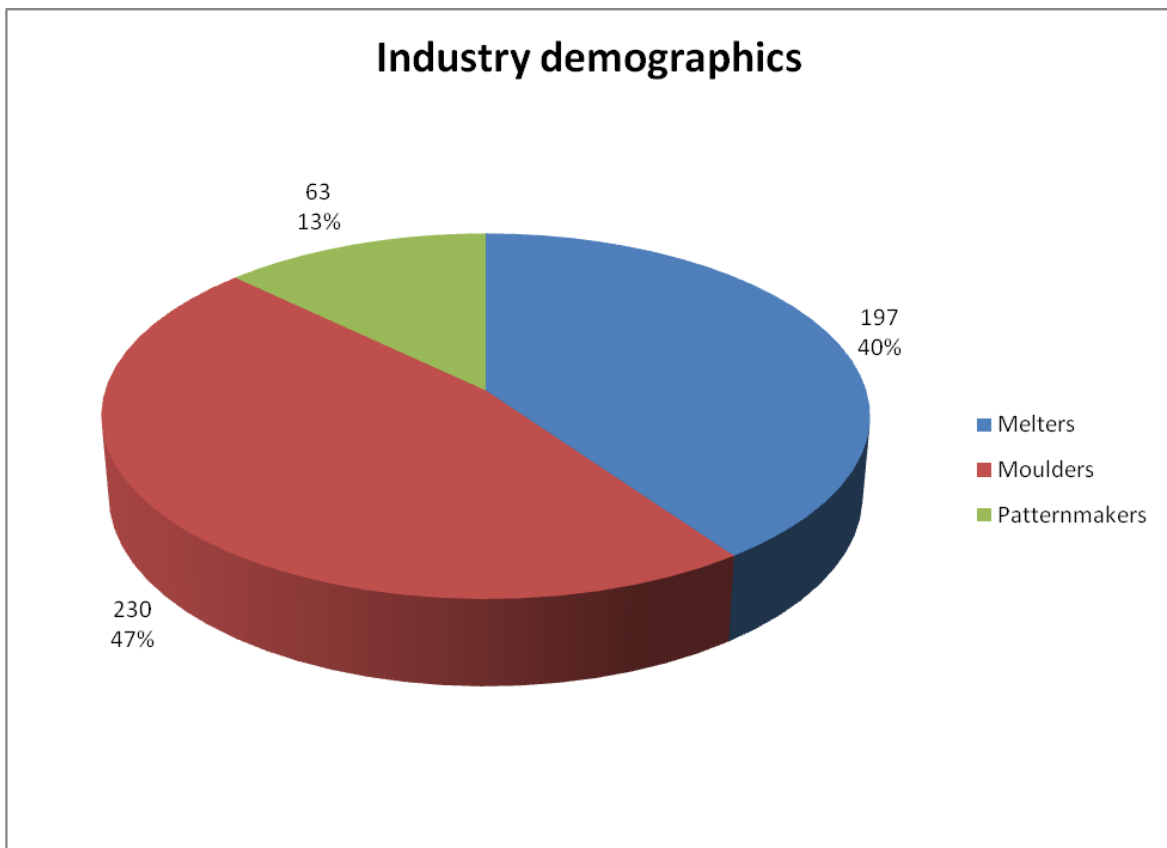
The regional training of assessors will be a key factor to successfully implement the RPL project.



Since this training does not depend on workplace access, candidate assessors can attend the training at a few selected central venues. The cost of transport and accommodation for the small number of assessors from the smaller regions will only have a limited impact on the overall budget for the project, especially since it can be offset by the cost of conducting additional training sessions.

3.6 Industry demographics

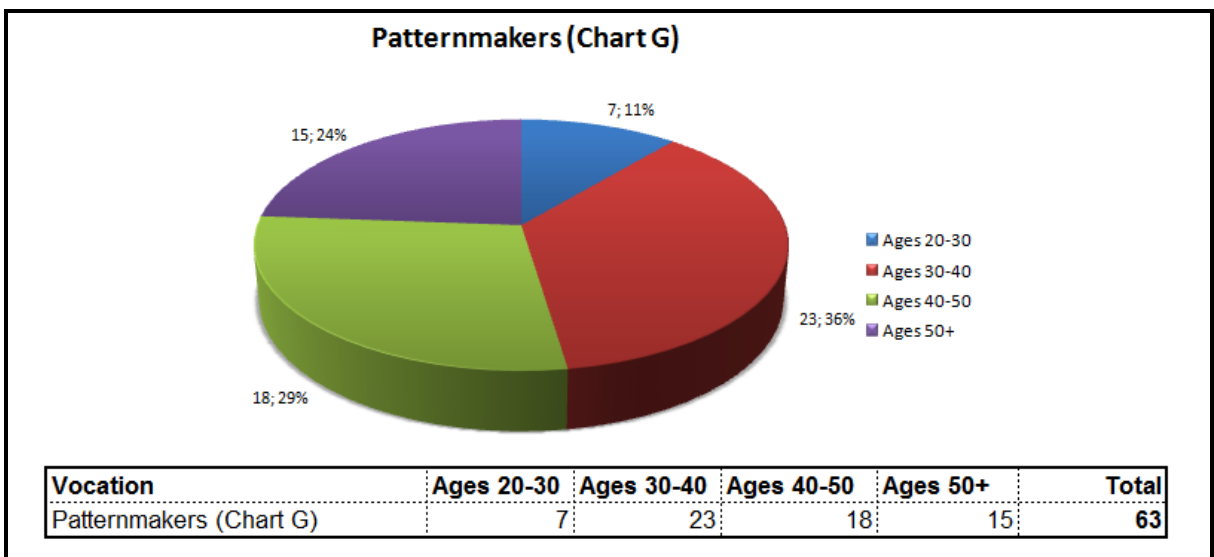
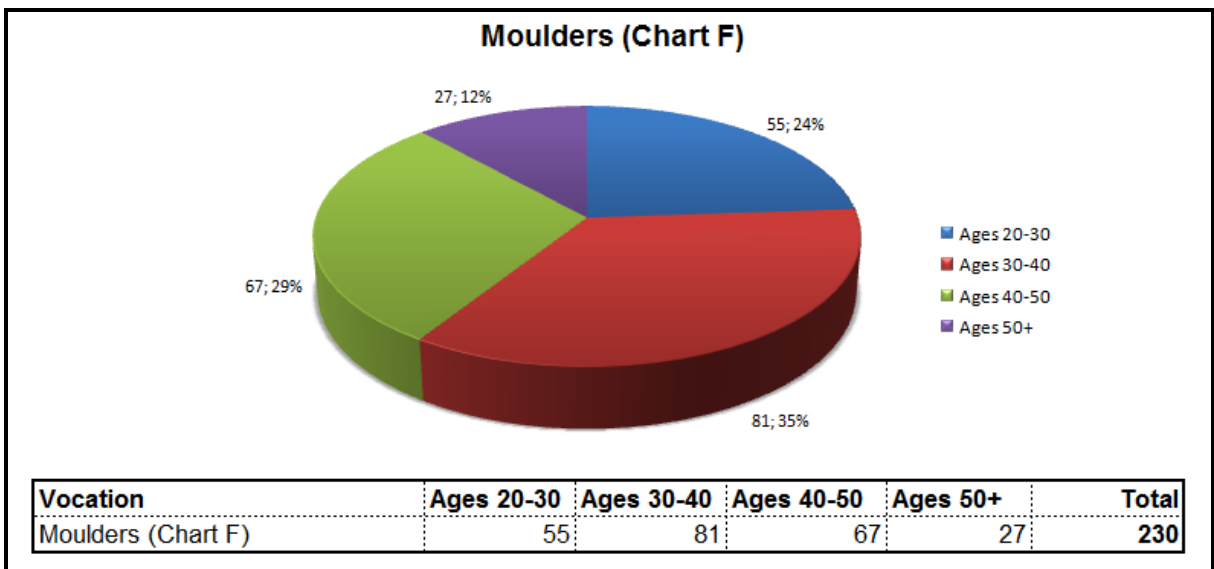
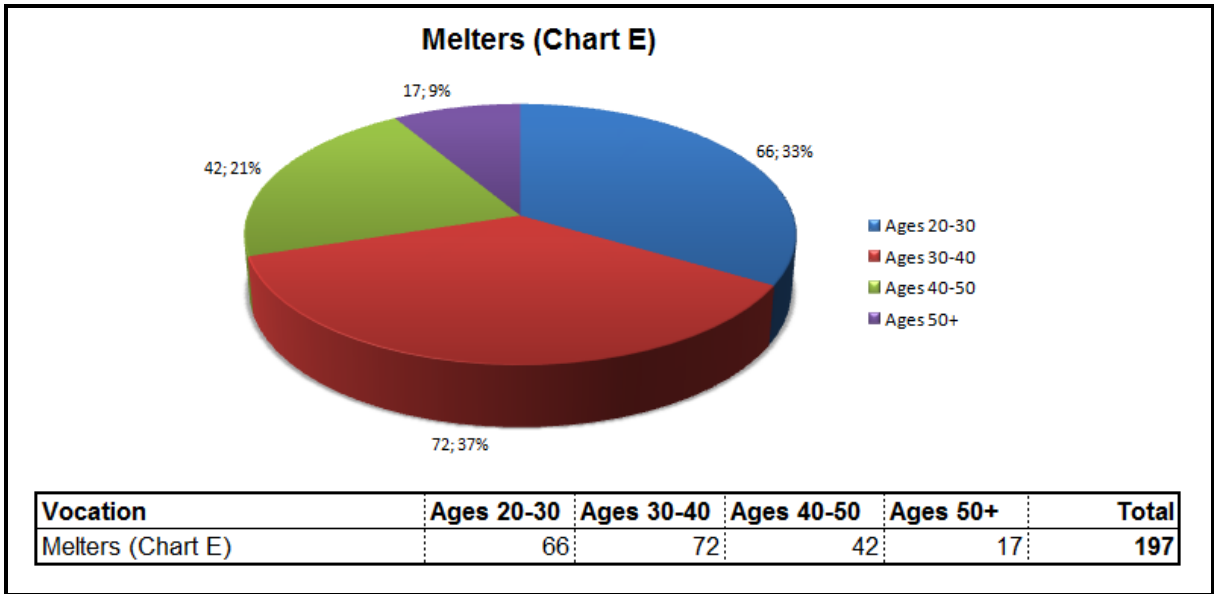
Respondents had to indicate the number of melters, moulders and patternmakers in their employ. These numbers are shown in the pie-chart below:



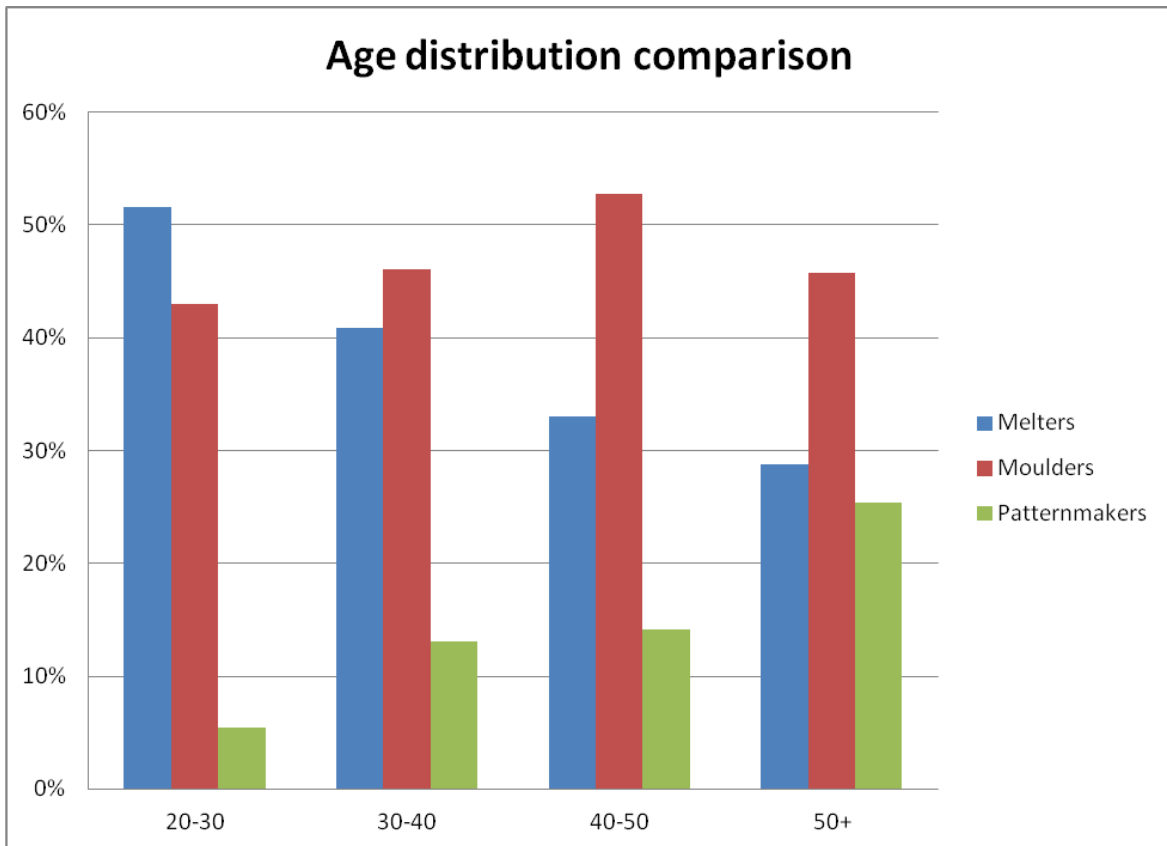
The chart also indicates that there is a good correlation between the distribution of melters, moulders and patternmakers in this chart and the one indicating the RPL "Trade focus". Exactly 60% of the total number of melters, moulders and patternmakers are earmarked for RPL.

3.7 Demographics per designation

The following three charts indicate the age distribution of current employees in each of the three trade groupings. We can see that the melter and moulder groups have a substantial higher intake of younger entrants when compared to the intake rate of the patternmakers.



The following chart is a summary of the three pie charts above:



It is important to note that melters are typically younger, with less melters in every consecutive age group. Moulders clearly have a older age group distribution with the peak in the 40 – 50 year age group. Patternmakers may be the most problematic group with only a small number of young entrants and more numbers in every consecutive age group.

These trends may indicate changes in the industry (e.g. patterns are imported / outsourced), or it may be indicative of a growing need for proper training and qualification of younger entrants. However, the need to properly qualify candidates in the younger age groups is undisputed.

4 CONCLUSIONS

The following are the main conclusions of our research:

1. An important part of the foundry industry is interested, enthusiastic and available to take part in a Recognition of Prior Learning intervention.
2. More than 50% of candidates are moulders, while only 15% are patternmakers.
3. With the exception of a handful of people, there is currently no subject matter experts trained or qualified as assessors in the industry. The result is that there is

very little hope that the current skills can be perpetuated successfully in the future and no possibility of skills being recognised in the future.

4. The regional distribution indicates that an RPL project can be launched successfully in focussed areas, with limited interventions possible for the smaller regions.

5 RECOMMENDATIONS

Without further consultation with the SAIF / NFTN steering committee, the following preliminary recommendations can be made:

- ✓ The concept of launching an industry-wide RPL project should be accepted and recommended for further investigation.
 - ✓ An RPL steering committee should be appointed to oversee the overall running and implementation of the RPL project. It is recommended that steering committee members should include representatives from SAIF, NFTN, MerSETA, industry and relevant industry trade unions.
 - ✓ The initial project plan for phases 2 – 4 should be updated, schedules revised and new budgets drawn up.
 - ✓ On approval, a detailed RPL project proposal should be compiled, submitted and presented to the MerSETA in order to obtain additional funding for the project.
-

ANNEXURE 1: FOUNDRY RPL NEEDS ANALYSIS PROJECT QUESTIONNAIRE RESOURCES

Dear Sir / Madam

The South African Institute of Foundrymen (SAIF) is investigating a project in which participating melters, moulders and patternmakers will be tested and certified (partially or fully) in terms of the existing national foundry industry qualifications. For advanced participants, this process will also indicate the gaps remaining for a national trade test.

In order to obtain the necessary financial support from government for this project, it is necessary to first establish the extent of the interest from industry. We would therefore like to request that you kindly take a minute to answer the following 6 short questions by just clicking on the "Reply" button of your e-mail and filling in your answers directly in the return mail.

1. Please provide the following basic company details:

Company name:

Contact name:

Designation:

E-mail:

Contact number:

2. How many melters, moulders and/or patternmakers with hands-on experience do your company employ? Please also indicate how many delegates fall within each age group.

Melters

Ages 20-30:

Ages 30-40:

Ages 40-50:

Ages 50+:

Total:

Moulders

Ages 20-30:

Ages 30-40:

Ages 40-50:

Ages 50+:

Total:

Patternmakers

Ages 20-30:

Ages 30-40:

Ages 40-50:

Ages 50+:

Total:

3. How many of these employees would your company like to have tested according to a prepared skills battery?

Melters:

Moulders:

Patternmakers:

4. Would your company be prepared to make these people available for testing during working hours (yes / no)? Scheduling will be arranged.

5. Would your company be prepared to have this testing done on your own site?

Fill in the names of the persons you would like to get trained as assessors in the space provided below:

Should you have any comments or require any information regarding this project you are welcome to state them in the space below:

Thank you for completing the questionnaire. You can now just click on the "Send" icon of your e-mail programme to complete the process.

ANNEXURE 2: RAW DATA

Eliminated companies					
No.	Company	No.	Company	No.	Company
1	A G Diecasting	19	Castco Precision Castings	37	Krynie Brothers
2	ACI Production Enterprizes	20	Centra Cast Industries	38	Litha Components
3	Albras Foundry	21	CME Foundry	39	Magma / B K Foundry
4	Alumadie Casting	22	Cobra Watertech	40	North Garden Furniture
5	Amron Industries	23	David Brown - Gear Tndustries	41	Pan Patternmakers
6	Arcadia Engineering	24	Denorco	42	Potch Engine
7	ATS	25	Dikuno	43	Pronto Patterns & Casting
8	Autocast Foundry - Brits	26	Eclipse Foundries	44	Proof Engineering
9	Autocast Foundry - PE	27	Flamequip	45	Protea Foundry & Engineers
10	B P Wiggel	28	Garre Zinc & Aluminium Die-castings	46	S & B Patterns & Foudries
11	Babcock Ntuthuko Powerlines	29	Girlock S A	47	S A Roll Company - SARCO
12	BAC Foundries	30	Halcast (Pty) Ltd	48	SAFA
13	Bel-Mec Aluminium	31	Heritage Castings	49	Tri-Cast Forming
14	Boksburg Aluminium	32	Heron Engineering & Foundry	50	VHE
15	Borbet	33	Holden Castings	51	Wam Metals
16	Brisan Turbo	34	Indipendant Foundries	52	XMECO
17	C B Foundries	35	Jaybee Castings	53	Zestcor
18	Cast Foundry	36	KPL Aluminium & Zinc Die-Casting		

NOT INTERESTED

	Company	Contact person	Designation	Contact number
1	Allcast Foundry	Garry Herbst	MD	021 9327141
2	Beta Castings	Monte		0824612624
3	C R Non Ferrous Castings	Andrew Engelbrecht	Man	011 8183666
4	Cera Cast	Me G Koekemoer	HR	053 3130667
5	F A Foundry	Scott	MD	011 6133686
6	H W Schmidt Industries	Rowena	MD	031 7011298
7	High Duty Castings	Ronnie Pienaar	MD	011 9141346
8	Integit Castings	Mr Anderson	MD	0118172120
9	Isando Foundry	Helia	HR	011 9744486
10	John Thompson Boilers	Lionel Solomon		0219598533
11	Kolbenco Automotive			0118647930
12	Maranata / x-Moda Enterprises	Reger du Toit	MD	011 8734850
13	Mazal Die-Casting	Automation		0219315177
14	Metal Concentrators			0123053562
15	Metx Process			0113971970
16	Nu-World Industries			0113212111
17	Pillman & Son	Pillman	MD	0118233948
18	Plasteron Industrial Plastics	Closing down		033 3903309
19	Prevail Engineering	only engineering shop	MD	0163620242
20	Pro Die Engineering	Brian Wood	MD	0118644515
21	Proco Foundry	Johan Slabbert	MD	0164211222
22	Sela Castings			0117389923
23	Southern Cross Mnf	Jeff Griffiths	MD	0860768849
24	Trifon Industries	Eva	HR	011 9533904

PENDING RESPONSES

	Company	Contact person	Role	Contact number	Email address
1	Active Foundry	Gilbert Ubisi	MD	011 8289900	gilbert@activefoundry.co.za
2	Alucast Foundry	Graham Tunstead		0414028800/0414028889	graham.tunstead@halbergsa.com
3	Autocast Foundry - Brits	Nelly van Vuuren	HR	012 2502920	nelly.vanvuuren@halberg.com
4	Autocast Foundry - PE	Shavonne. van der Walt	HR	041 4050755	shavonne.vanderwalt@halberg.com
5	B P Wiggel	Brown Wiggel	MD	011 8923913/4	bpweng@iafrica.com
6	Cocorde Foundry	Eva Sebelelo	HR	016 4213100	eva@conver.co.za
7	Continuos Cast Products	Yousuf Mohamed	MD	0116229711	sales@goldcirclemetals.co.za
8	Crown Cast	Magda Lewis	HR	011 8947171	magda@crowncast.co.za
9	Denville Founders	Sandy van Niekerk	HR	011 4526955	lynnritz@mweb.co.za
10	East Rand Alloys	Harry Nizimore	MD	011 7409862	harry@mstec.co.za
11	Elcast	Vincent Chetty	MD	0312740000	vincentc@elgin.co.za
12	Elmacast	Lynne du Preez	HR	011 8183511	lynne.du-preez@actom.co.za
13	E's Foundry	Ernie Cronje	MD	0828765495	steven@esfoundry.com
14	ETS Foundry / Gear Pumps	Meloney	HR	021 5319330	meloneyb@gearpumps.co.za
15	Fame Style	Davey Chen	MD	0123466090	alessa168@gmail.com
16	Forbes Brothers	Beverly	HR	011 6262444	bevi@forbesfoundry.co.za
17	G E Pattern & Foundry	Garth Robins	MD	0879401632	gepatterns@klear.co.za
18	Groves Foundry	Elize		0117400103	groves@gwisa.com
19	Halberg Alluminium	Bernard Brussow	MD	0414028800	sharon.loenen@halbergsa.com
20	Hayes Lemmerz	Trevor Volek	MD	0116174700	tvolek@hayes-lemmerz.com

21	Helio Microfinish	Andy Goodman	MD	0317004295	agoodman@microfinish.co.za
22	Inkunzi Foundry	Daniel Joubert	MD	032 4592994	daniel@inkunzico.za
23	J C Impellers	Alex Thompson	HR	011 8271913	alex@jcampellers.co.za
24	Joesph Grievson	Terrence	MD	031 5073640	terrence@josgrievson.co.za
25	Knight Sales	Belinda	HR	011 8272517	knightsales@telkomsa.net
26	Kroon Gietery	Koos Smit	MD	056 2152075	gietery@gcs.co.za
27	Lenreco	Darren	Man	011 9087000	darren@lenreco.co.za
28	M G Casting Suppliers &Pattenmakers	Martin Booyens	MD	0877543693	Voice mail (tried numerous times)
29	Malleable Castings	Johan Visser	Owner	011 8221503/5	foundary@global.co.za
30	Matt Cast Suppliers	Glen	MD	011 8732279	allan.bruggeman@mattcast.biz
31	Mc Wade Productions	james Ruossouw	Foundry Man	0113162262	jamesr@mcwade.co.za
32	Metso Minerals - Vereniging	Victor Mohlathe	HR	016 4307200	victor.mohlathe@metso.com
33	Mittal / Arcelor	Keletjo Chiloane	HR	016 8893071	keletjo.chiloane@arcelormittal.com
34	Natal Iron & Brass	Sam	Man	033 3866573	nibf@mweb.co.za
35	Ndebele Stoves	Herman Wolf	PM	013 9321376/0829259006	stowe@lantic.net
36	Olde World Industries	Vincent Farrar	MD	0317361888	owf@izars.com
37	Outdoor Lifestyle	Hans Ilse	MD	0215352740	ldelange@odls.co.za
38	Parys Gietery	Susan van der Merwe	HR	052 8198478	parys.gietery@absamail.co.za
39	PCS Foundry	Chrissie	HR	011 7409020	chrissie@pcsfoundry.co.za
40	Pefco - Pinetown Engineering Foundry	Ajith Singh	GM	0317172900	ajith@pefco.co.za
41	Preformed Line Products SA	Alwin Duckham	OM	0333975800	alwind@preformedsa.co.za
42	Pressure Die-Casting	Roy Rabiduth	HR	033 3975500	royr@pdc.co.za
43	Quantus	Sharon	Man	011 8245587	esjt@mweb.co.za

44	Rely Intracast	Magda	HR	0119141640/9181943	magda@rely.co.za
45	Richards Bay Foundry	Louis Potgieter	MD	0357975030	rbfoundry@absamail.co.za
46	S A Roll Company - SARCO	Dries Smuts	MD	0169107028	dries@sarco.co.za
47	Scaw metal Group - Benoni Works	Johan van der Merwe	GM	0117493600	johan.vandermerwe@scaw.co.za
48	Scaw metal Group - Dimbaza	Frank Roddy	GM	0406562050	froddy@scaw.co.za
49	Scaw metal Group - East Plant	Okkie de Bruin	GM	0117475000	mfourie1@scaw.co.za
50	Scaw metal Group - Germiston Works	Lourence Erasmus	BM	0118429000	laurence.erasmus@scaw.co.za
51	Scaw metal Group - Head Office	Malicia Awunor	HR	0118429000	mawunor@angloamerican.co.za
52	Special Alloys & Products	Chris Koch	MD	0123053987	samscc@mweb.co.za
53	Steljoy Castings	Ilse Taylor	HR	013 9333331	ilse.taylor@steloy.com
54	Stiemens Die-Casting	Frikkie Stieler	MD	0118132324	hanler@mweb.co.za
55	Stove Meca	Johan	Foundry Man	0118182173	jlab1@iafrica.com
56	Takata-Petri South Africa	Jimmy Nortje	MD	0215738200	rowan.savage@eu.takata.co.za
57	Talbot Engineering	Cecil Heymans	MD	0116242690	talboteng@mweb.co.za
58	The Foundry Complex	Mariaan	HR	011 8241025	thefoundrycomplex@hotmail.com
59	Thermitrex	Leoni	HR	0119142540	leoni@thermitrex.co.za
60	Thor Wear Parts	Andre Ludick	Man	011 8234443	marietter@sigmateamsa.com
61	Transwerk - Koedoespoort	John Davis to give us information from Geloep		0514082038	
62	Umbilo Castings	Gert Bernade	MD	0118945799	gert9@vodamail.co.za
63	Vereeniging Foundries	Andreas	Man	016 4549443	andreas@verfdy.co.za
64	Viking Foundry	Lynette	HR	011 8735093	greg@vfdy.co.za
65	Wahl Aluminium	Gary	MD	011 4740226	gary@wahl.co.za
66	Wier Minerals	Florence Chadinha	HR	011 9292600	florence.chadinha@weirminerals.com

67	Witbank Foundry	Rene	HR	013 6561731	wfoundry@lantic.net
68	Yellow Star Man.	Herman Joubert	GM	0164228087	celeste@steelballs.co.za
69	Zimalco	Liz	HR	011 9144300	lizm@zimalco.co.za

Companies not listed on the directory

1	Wilcast Die-Casting				
2	Falcon Aluminium Alloys				
3	Standard Foundry				
4	St Gobain Pipelines				
5	PCP				
6	IPT Foundry				

RESPONSES

	Company	Contact person	Role	Contact number	Interested	Regions
1	Agrico	Boet Strydom	MD	021 9504263	Yes	WC
2	Boschpick Engineering	Elize Botha	HR	034 3757281	Yes	KZN
3	C F W Industries	Joe	Man	021 0218331	Yes	WC
4	Casting & Machining Srevices	Justin Stevens	MD	011 8285520	Yes	GP
5	Denel Aerospace Foundry	Gavin	HR	0119273516	Yes	GP
6	Extratech	Linda	HR	011 4748930	Yes	GP
7	Guestro Castings	Vani Nado	MD	011 8451546	Yes	GP
8	Hi-Alloy Casting	Roger Lindley	HR	011 4215874	Yes	GP
9	Joerg Foundry	Henri le Roux	GM	014 5381014	Yes	NW
10	Johannesburg Foundry	Mellory	FM	011 8222504	Yes	GP
11	Kimberly Engineering Works	Ellis	HR	053 8410474	Yes	NC
12	Lusafrica Fouders	Paul	HR	011 8738910	Yes	GP
13	Metso Minerals - Isithebe	Colin Ubisi	GM	032 4591764	Yes	KZN
14	M.I.S. Engineering Group Co's	Shana Clarke	GM	011 9081696	Yes	GP
15	Mustang Foundry	Roy Duncan	HR	011 8947016	Yes	GP
16	Northern Cape Iron & Steel	Alfie Hoole	Man	053 3132147	Yes	NC
17	Northern Natal Bronze and Iron Founders	Brett Balsdon	MM	0342124111	Yes	KZN
18	Pfisterer	Nithia Govender	HR	033 3975400	Yes	KZN
19	Prima Industrial Holdings	William Price	Tech dir	0114216911	Yes	GP
20	RST Special Metals (PTY) Ltd	David Fundzane	Dir. HR	013-2469116	Yes	MP

RESPONSES

	Company	Contact person	Role	Contact number	Interested	Regions
21	Scaw metals Boksburg Foundry	Patrick Riley	PM	011 914 8600	Yes	GP
22	Superior Casting Suppliers (Nicast)	Madelaine	HR	016 4223976	Yes	GP
23	Thomas Foundry	Barry Butler	MD	011 8733200/9	Yes	GP
24	Thos Begbie & Company (PTY) Ltd	David Fundzane	Dir. HR	013-2469116	Yes	MP
25	Umgeni Iron Works	Lionel Moodley	MD	031 5791361	Yes	KZN
26	ASSA Abloy SA	Lyna	HR	011 7615000	No	
27	Alumacast CC	Terry Brooks	Member	0128036535	No	
28	Atlantis Foundry	Rose Davids	HR	021 5737200	No	
29	Auto Industrial Foundry	Heinrich Froemming	MD	011 8243616	No	
30	Donnlee Engineering	Thinus Brits	MD	011 845 3150	No	
31	Federal Mogul - Pinetown	Beki Nkala	Man	031 7173300	No	
32	Grifo Foundry	Andrias	Man	011 8734459	No	
33	Pex Foundry	Nicky	HR	021 5563234	No	
34	Prism Products	Ronnie Fourie	HR	043 7452212	No	
35	Protea Foundries	Corrie	HR	016 9860713	No	
36	Sheffield Non-Ferrous	Ken Groom	MD	032 9470172	No	
37	Transwerk - Bloemfontein	Kobus Coetzee	MD	051 4082038	No	
38	Ukukthela			0127198860	No	
39	Vestcast	David	Man	011 3974564	No	
40	Zealous Automotive	Paul	MD	011 8131130	No	