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AFASA Budget Proposal Speech

Presented by Mr Mike Mlengana
President: African Farmers' Association of South Africa (AFASA)

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"Nothing for us without us"

- Programme Director
- The honourable Minister of Agriculture, Forestry and Fisheries, Mr Senzeni Zokwana
- Deputy Minister of Agriculture, Forestry & Fisheries, General Bheki Cele
- Deputy Minister of Rural Development & Land Reform, Mr Mcebisi Skwatsha
- Director Generals of DAFF and DRDLR
- National Executive Councils of AFASA and NERPO
- Representatives of commodity associations
- Esteemed guests, Ladies and Gentlemen

In the state of the nation address (SONA) in February 2015, President Jacob Zuma declared 2015 the Year of the Freedom Charter and Unity in Action to Advance Economic Freedom. With that, he spelt out a nine-point plan to drive economic growth in South Africa, with a special focus on job creation.

Notably, “revitalising agriculture and the agro-processing value chain” were second in the list, which includes a range of interventions that are also required to make agriculture and the development of agricultural value chains work. In his budget vote speech of 13 May 2015, Minister Zokwana made it clear that “the Revitalisation of the agriculture and the agro-processing value chain” is the key focus of Department of Agriculture, Forestry and Fisheries’ (DAFF) mandate, which will be measured in terms of food security, job creation and contribution towards the GDP.

Meanwhile, earlier in the year, leaders of the African Farmers' Association of South Africa (AFASA), representatives of some commodity associations and business partners resolved that unless smallholder farmers take a lead in their own development, very little would be achieved in the transformation and growth of the agricultural sector. They realised that growth of the smallholder sector is not only improvements in productivity and the size of the agricultural enterprises owned by black farmers, but more importantly, participation in and having ownership/control of the entire value chains that they are participating in. On reflection on all the agricultural support programmes of the past twenty years and the negligible impact that has been achieved though billions of rands have been spent in the name of developing smallholder farmers (e.g. R79 billion spent in 2012/13 – 2014/15, mainly in acquiring land), farmers are convinced that the onus is upon them, as the most affected party, to ensure that tangible development takes place in the next 15 years and beyond in line with the National Development Plan (Vision 2030; NDP) and global imperatives. At the heart of this, is ensuring that the land that they occupy is made more productive.

In a sense, the Department of Agriculture, Forestry and Fisheries (DAFF) has admitted to the weaknesses of the past in its preamble to its draft Integrated Growth and Development Plan 2031, which was drawn up in 2013. The statement in part, read as follows:

"…Government at this stage lacks policy through which an economic and market environment can be provided for the transformation of South Africa's agricultural, forestry and fisheries sectors, whilst maintaining productivity and production efficiency for purposes of ensuring national food security and a robust trade balance. Furthermore, uncoordinated implementation and planning by government has frustrated the effective implementation of government strategy, with each programme designing its own implementation plan, leaving a fragmented scattering of projects across South Africa's landscape…."

Since then DAFF worked on the Agriculture Policy Action Plan (APAP) in consultation with a number of key stakeholders and provincial departments of agriculture. We are pleased that APAP, which intends to focus on implementation of agricultural development as opposed to being just a strategy, was adopted by parliament in February 2015 and the cabinet in May 2015. Now it is time for the rollout of the first phase, APAP 2015-2019.

AFASA supports APAP as a means for a coordinated and targeted approach to agricultural development in South Africa, which involves all role-players. AFASA appreciates and applauds the manner in which APAP conceptually integrates all major national policies (NDP, New Growth Path (NGP); Medium Term Strategic Framework (MTSF); Outcomes 4, 7 and 10 of the Presidential Outcomes Approach; Strategic Integrated Project 11 (SIP 11) of the National Infrastructure Plan; and the Integrated Growth and Development Plan (IGDP) for Agriculture, Forestry & Fisheries) and channels them all into one action plan.

The association further notes other key developments that are taking place in the agricultural space, such as the development of agri-parks as stated by the State President in the SONA and expounded by the Minister of Rural Development and Land Reform in his Budget Policy Speech on 8 May 2015; and the special economic zones as well as the secondary agricultural marketing cooperatives that are driven by the Department of Trade and Industry (the dti).

AFASA has actively participated in the consultative processes of the development of many of these programmes, provided input and indeed endorsed some of them as good initiatives for growing and transforming South African agriculture. Our greatest trepidation is to see these good plans come to nothing at the end of their term, and as has been the tendency in the past 21 years, being revised and given new names and lease of life on the shelves. In order to avert that, AFASA proposes a budget for the development of South African agriculture, which particularly addresses the needs and aspirations of smallholder farmers, contributes to mandate to “revitalise agriculture and agro-processing,” has measurable indicators and is in line with the spirit of APAP.

Fortunately, Minister Zokwana recognises that smallholder farmers can make the greatest transition and impact in “revitalising agriculture and the agro-processing value chain” and hence, as part of the key drivers to achieve this, he included “productivity and support of smallholders and new entrants.”

When we unpack this at AFASA, we understand the support to smallholder farmers, in line with Minister Zokwana’s five key points, to translate to the following:

- Ensuring that the smallholder farmers (existing and new entrants) have adequate knowledge, skills and information to operate the enterprises that they have selected.

- Ensuring that they have the means to scale up/aggregate and to at least attain the threshold economies of scale that are required to achieve profitability per given enterprise (or combination of enterprises).
- Ensuring that smallholder farmers have adequate support in terms of access to credit, up to date and applicable technical services, relevant research, business information and real time market information.
- Ensuring that smallholder farmers are well-linked to the value chains of the commodities that they produce, and not only as suppliers but also stakeholders in the market, infrastructure and facilities that they use. Farmers should not only act as suppliers for the local markets but also for markets beyond their immediate reach, including access to export and niche markets.
- Ensuring that smallholder farmers have security of land tenure by urgently instituting reforms to current land tenure arrangements. Long term leases to land are viewed by AFASA as appropriate instrument to secure tenure.

On further reflection, our proposed approach for the development of the agriculture sector that we have put forward from our founding days would adequately provide the needed support to include smallholder farmers in "revitalising agriculture and the agro-processing value chain." Our approach states that:

- There should be **a farmer register** that serves as baseline information of who is involved in the sector, on how much land, what and how much is produced, and for which markets, etc. To date attempts have been made at establishing this register and millions of rand spent, but the task has not been accomplished.
- There should be an **agriculture sector plan** outlining how farmers operating on various sizes of enterprises, and producing different commodities, etc., should be supported to attain specified levels of production based on the capacity and capability of their set of resources. We believe that APAP is somewhat a good attempt at developing an appropriate framework, and hence we do not want to see it fizzle out and not be implemented.
- We should ensure that we have capable and informed farmers through **vocational farmer training and mentorship programmes** and hence the recommendation for a national farmer training academy as well as the development and roll out of the mooted agricultural information management system.

- We need strong and **inclusive agricultural value chains** supplying what the markets want and owned by the users. It is important that these value chains are owned and operated by smallholder farmers and not the existing large integrated value chains, oligopoly players, or non-agricultural entities who come to prey on the current sector players. So AFASA proposes that smallholder farmer cooperatives or their businesses must own and operate at least one major and whole value chain per sector as identified in APAP.
- Over and above, we need an **enabling environment** for equitable growth and transformation of the sector. This means that the legislation, which is fairly good, existing regulations and programmes should actually be implemented.

Our proposed budget therefore consists of programmes that are in line with these priorities.

1. Farmer register

AFASA recommends that a carrot and stick approach should be used to compel farmers to register on a central database of farmers in South Africa, which will be updated regularly. The database should include the farmers' personal details, land ownership, skills base (i.e. level and type of education plus real life skills in terms of work experience) as well as current production and market access details. It should be the basis for deciding the support required by the farmers in a particular region to meet target levels of production. It should be used to provide comprehensive support to farmers, according to their needs and to a pre-determined exit point beyond which it is certain the farmers' businesses would survive and grow. No farmers should be eligible for any government support if their names are, firstly not on the database, secondly and equally important, there is no evidence that they have committed themselves to farming as a lifestyle or business. It is important that only persons who want to and are committed to farming are supported to do so.

The proposed budget for the farmer register is R70 million for establishing the register and R10 million per annum for four subsequent years, to be used to update and maintain the farmer register. We anticipate that this would create up to 480 jobs; mostly temporal ones.

2. Farmer training and mentorship

One of the greatest challenges in South Africa is that it is assumed that anyone can farm. And yet as with other professions farmers need to learn how to farm, must want to farm, and not only learn from a classroom situation but to also get their hands dirty.

AFASA proposes that there be a single national vocational training programme for farmers that, as much as possible uses the existing infrastructure of training colleges, universities and research stations to train farmers to an appropriate level of farming before other resources are invested into that farmer and his/her new venture.

With that in mind, AFASA strongly recommends that all agricultural colleges remain under DAFF but be operated under the requirements of the Higher Education Act of 1997 as amended. We believe that only DAFF and its immediate stakeholders understand the sector well enough and have the expertise and keenness to position themselves to respond to changing needs and developments timeously so as to serve the sector adequately. AFASA strongly objects to the idea that agricultural colleges be transferred to the Department of Higher Education.

The budget for the vocational farmer training programme should be R250 million over five years. This assumes that R50,000 will be used per farmer and target some 5 000 smallholder farmers to be developed as potential new commercial farmers. This would in turn have the potential of creating 25,000 jobs based on an output of 5 jobs per successful farmer that is established.

3. Agriculture Information Systems

Reliable and up to date agricultural information is not easily accessible to most smallholder farmers. Where it is, it is usually in a format that they cannot understand or conceptually link with other aspects of their farming in order to make informed decisions of what to do. Most farmers rely on agricultural extension officers for advice but soon realise that they know more than the advisors, purely from the latter's lack practical experience. AFASA therefore proposes that there be a National Agricultural Information and Media Services (AIMS), whose main function would be to provide timely, easily accessible and usable agricultural information to all segments of the agricultural sector and more specifically the smallholder producers and small scale entrepreneurs through various forms of media such as print, cyber networks, TV and radio. The proposed budget for the National Agricultural Information and Media Services is R50 million in the first year and R10 million per annum for each of the subsequent four years.

4. Strong and inclusive value chains

AFASA leadership have concluded that smallholder farmers must participate not only by working the land, but also owning shares in the entire value chain of all the commodities that they produce. That way, smallholder farmers would not just be price takers from both input and output markets but would have some influence on the pricing as well as benefit from the profits that are generated in the other segments of the commodity value chains. AFASA has thus decided that in the period 2015-19, it will focus on red meat, vegetables, game, deciduous fruits, grain and poultry value chains and develop them in accordance to and with the support of proposals that underpin APAP. AFASA will work with commodity associations and other development agencies that support smallholder farmers to drive this initiative.

4.1 Red meat industry

About 70% of South Africa (i.e. 83.9 million ha) is grazing land. This land holds 14 million cattle, along with other grazing ruminants. Forty percent of the cattle (5.4 million) are in the smallholder sector. The estimated offtake from this sector is up to 10%; i.e. 540,000 cattle per year and yet the potential offtake is at least 1,400,000 calves per year.

Through the National Emergent Red Meat Producers' Organisation (NERPO), AFASA will drive the establishment of Livestock Syndicates across the country. In the first five years, NERPO will establish and assist 100 syndicates of at least 1,000 livestock farmers in the major cattle producing districts of South Africa so that they build their herds and collectively supply a minimum of 20,000 slaughter cattle per annum to a single channel market. With such numbers of cattle going through the channel the farmers would be assisted to acquire shares in the feedlots and abattoirs that they use, based on the volume of business that they do with these entities. The target markets are government institutions such as hospitals, prisons, schools, etc. With time, the livestock syndicate scheme hopes to take advantage of the BRICS block and establish markets through those channels.

The target output is growth from the current average 12 weaners/farmer to 55 weaners per farmer per year, over the first five years. The total budget to facilitate the development of the livestock and meat value chain for these farmers is R420,000,000 over five years, of which R200,000,000 would be required in the first year. The initiative will create and secure about 2,500 jobs at farm, feedlot and abattoir level.

4.2 Vegetable value chain

In South Africa the vegetable value chains is dominated by a few mega scale producers such as ZZ2 (tomatoes), Wildeklaver (Onions) and Rugani (carrots). There are many smallholder farmers but it is well known that most of their products end in informal markets, where they quickly deteriorate in quality before they are sold, basically because post-harvest care and facilities do not exist where black farmers are farming.

AFASA proposes an intervention that will scale up smallholder vegetable production through an incubation programme that is implemented in a partnership between government, the smallholder farmers, commercial farmers and the private sector. Through the programme and per annum, 60 smallholder farmers will be assisted to acquire 10ha plots each on a 10 year lease, supported to obtain appropriate infrastructure and inputs, and through training, mentorship and provision of timely production and market information. The products from the farmers will be collectively marketed through offtake agreements with participating private sector partners who guarantee transparent and competitive prices. At the end of five years, 300 farmers will be participating, and each is expected to realise a gross turnover of R2.4 million.

The programme requires R589,200,000 over five years of which, R117,840,000 is required in the first year. It will generate 11,250 jobs over the five year period and create production value of R680 million.

4.3 Game farming

The land area under game farming has increased from 2 million hectares in 1979 to about 21 million hectares at present and employs more than 100 000 people. Game farming is highly profitable; it generates R220/ hectare compared R80/ha for livestock and can employ three times as many people as livestock. The value of game sales, hunting, venison and ecotourism amount to well over R9 billion per annum. Despite all the opportunities, black farmers still remain passive participants in this booming sector.

In line with the Budget Policy Speech of the DRDLR, we propose that at least 10 emerging farmers per annum are assisted with the necessary infrastructure, game stock, capacity building and entrepreneurship in order to establish commercially viable game farms and related enterprises in partnership with the developed private sector. The supported farms will be a combination of private smallholders, rural communities and land restitution owning more than 250,000 hectares of unproductive. This will also allow them to actively participate as equitable partners in progressive programmes such Agriparks.

R750 million investment will therefore be required in 50 game farms over five years across the country.

The interventions are expected to create at least 5,000 jobs and a potential return on investment of 200%; that is R1.5 billion in the first five years. It has potential to be scaled up in 10 years to include additional 100 farms and create more 15,000 jobs per annum.

4.4 Deciduous fruits

The annual income of the deciduous fruit industry is approximately R9 billion, of which 71% is from exports. Despite many private and government interventions to support new entrants, few black farmers participate in the deciduous fruit industry. 113 units are wholly or partially owned by 6,835 black farmers as compared to 1,134 white commercial farmers. The land area used by black farmers is 689ha; which is 1.38% of 49,586ha under deciduous fruit.

Through the Deciduous Fruit Development Chamber (DFDC), AFASA is proposing a five year programme that will profile all the developing deciduous fruit producers, develop appropriate business plans for each farmer, increase production from black farmers by establishing 1,227 ha of new orchards, upgrade the production capacity, improve their market access and value chain participation. A total investment of R706,054, 012 is needed to implement this 5 year programme, of which R89,670,000 is required in the first year of implementation. The establishment of 1,227ha of new orchards will create 1,828 jobs in primary production and generate cash flow stream to a Net Present Value of R 220 million.

4.5 Grains and oils

Some three million hectares of arable land lies fallow in South Africa every year. Most of this fallow land lies in highly productive yet poverty stricken regions of the country; in Eastern Cape, Kwazulu-Natal, Limpopo and Mpumalanga provinces. As a result of climate change, the “grain belt” is moving from the west towards the east and south (Eastern Cape and KwaZulu Natal). This is further compounded by the fact that over 30% of the highly productive land in Mpumalanga has been taken out of production by mining. Therefore without a concerted and clear effort to shift South Africa’s grain production base to the

Eastern Cape and KwaZulu Natal the country is going to face a food security disaster of untold proportions.

In 2014/15, maize stocks are down to an estimated 9.5 million tonnes; some 1. 5 million tonnes short of the requirements and down from nearly 14.2 million tonnes in the previous season. So South Africa is going to have to import a key product that it can easily produce itself ordinarily, whilst the infrastructure to import is not in place and the cost to the fiscus will be quite severe.

The proposed intervention is the immediate roll out of Fetsa Tlala targeting some 150,000 ha in the first year and expanding to 2.5 million ha by the tenth year. (We note that Minister Zokwana has set aside R678 million for only 128,000 ha).In the Eastern Cape alone there is one million hectares of productive land and hence 60,000 ha would be targeted out of Eastern Cape in year 1. The programme would plant maize, soya, sorghum, and dry beans in rotation; with maize being 60%, soya 20%, dry beans 10% and sorghum 10%. This would yield some 450,000 tonnes of maize, 60,000 tonnes of sugar beans, some 120,000 tonnes of soya and 66,000 tonnes of sorghum from 15,000 black farming households. The overall investment in year 1 at R10,000 per ha would amount R1.5 billion in production finance. This would be about 40% financed by grants (i.e. R600 million), which should reduce over five years to 0% grant funding.

The role of government through the various departmental agencies would be to manage and finance the supporting infrastructure from fencing, roads and more especially establishment of silos, feedlots, mills, processing plants, etc. This is critical since the most suitable new planting areas do not have the appropriate infrastructure to support production. Without silos for example it is impossible to supply the dairy, poultry and feedlots industries, which need to have stable and consistent supply of feedstock throughout the year. Some 5 million tonnes of silo capacity needs to be established at about R6,000 / tonne meaning that about R3.0 billion must be invested in silo capacity alone over a 10 year period in order to fully utilise the 3 million hectares.

4.6 Poultry

The poultry industry in South Africa is dominated by fully integrated poultry value chain oligopolies (6 companies nearly 80% of the market). These companies and importers have made little effort to integrate new players especially black smallholder farmers and black agribusiness players into either their supply chain or any where into the business of poultry. This means that the current poultry value chain has less than 5% active participation by black players even today in 2015. The contribution to the upliftment of smallholder farmer cannot be left to the big six, SAPA and importers.

AFASA as a directly affected party, therefore proposes that in a new deal with the USA through the African Growth and Opportunity Act (AGOA), The South African government should firstly, allow imports of chicken directly from the US and sell the products in South Africa. AFASA recommends that 100% of import quota be allocated black business entities. The proceeds would be used to build local capacity and create new market linkages for smallholder farmers in the poultry industry principally independent from the current major players. Secondly, AFASA should negotiate with players in the poultry industry in the USA to establish new linkages and partnerships that would promote greater participation, competitiveness and efficiency of the poultry industry in South Africa and Africa in general.

4.7 Other commodities

Given that APAP is iterative, AFASA will expand on these proposals, to include other commodities year on year, starting from the next financial year and in line with market demand for commodities that are produced by smallholder farmers as well as with APAP and other similar national development programmes.

5. Cooperatives

Key to the development of the value chains above, is the simultaneous development of cooperatives around these value chains, which will enable cheaper access to input and output market, easier access to technical and market information as well as generally reduce the cost of doing business for the farmers. AFASA subscribes to the agri-parks programme, elaborated by Minister of Rural Development and Land Reform in his budget policy speech.

In 2015/16 AFASA will facilitate the establishment of district secondary agricultural marketing cooperatives around the value chains that will be developed, using the model that was piloted with Chris Hani Agribusiness Secondary Cooperative (CHABSCO). It is envisaged that at least 10 district agricultural marketing cooperatives will be initiated in the first year, at a cost of R50,000,000 each; and hence R500,000,000 will be required for this activity in the first year. And a total of R1.5 billion for the 10 cooperatives over five years.

At least 140 people will be employed by these cooperatives.

6. Financial support

Two major financial support services would be required to make the above initiatives workable; namely access to grant funding and low cost credit facilities which will enable the farmers to establish their enterprises and secondly, insurance products to protect against major risks in agriculture.

The farmers have taken the initiate to establish the National Farmers' Cooperative Bank of South Africa (NAFCOBSA), which will start operating by November 2015. The bank requires an initial investment of R500,000,000 to on-lend to smallholder farmers.

Secondly, AFASA has recommended that government uses some of the disaster management fund to establish an index-based insurance scheme that would hedge farmers against losses due to drought and other inclement weather conditions as well as disease outbreaks. An initial investment of R500,000,000 is required to insure smallholder farmers.

The above programmes will require a total budget of 2,827,510,000 in the first financial year, and R6,725,584,012 over the first term of APAP (2015-2019). The programmes will support about 3 million smallholder farmers and will create at least 113,848 direct jobs.

Critical support

Government has a number of programmes that are designed to support smallholder farmers. As stated at the onset, these have been implemented in a disjointed manner.

AFASA recommends that all government farmer support programmes be organised into a comprehensive agricultural support programme (a renewed CASP) which is designed to assist individual or groups of farmers/agribusinesses to develop to a stipulated exit point, at which such farmers or businesses are considered viable and sustainable.

A Special Purpose Vehicle (SPV), which is a one stop shop service should be established for all government financial agriculture support programmes. The mechanism for such a service should be to ensure that whoever accesses funding (be it the farmers or development agencies) is to develop farmers who are registered in the electronic farmer register and according to a stipulated programme in line with major national programmes to reach specified targets by 2030. The assistance provided to each farmer/group of farmers should have an exit point (e.g. certain level of knowledge, skills and turn over), after which the farmers graduate from such schemes. This would enable the government to ensure that financial resources are used to develop farmers and their enterprises to a point where they are viable, and thereafter move on to support other farmers and their enterprises. It will prevent the reported incidences of double dipping and the repeated rescuing of failing enterprises.

Extension services are the major provider of information to smallholder farmers but field staff are often ill-equipped for the task, even after the extension recovery programme. AFASA recommends a pluralistic system in which government provides norms and standards and allows many role players to provide extension services; especially the commodity associations. Extension services should be strongly linked to the research and development function of the Agriculture Research Council (ARC) and other research institutions.

All other non-financial support services to farmers (e.g. compulsory community service of veterinarian), should be similarly coordinated such that they achieve the highest impact possible.

A number of state owned institutions are used to provide support to agriculture. As with policies and programmes, there are disconnections or duplication between national policies and what the SOEs do or a duplication of activities between an SOE and government departments.

Some examples are as follows:

The Agriculture Research Council (ARC) should not necessarily have its own extension staff but could use provincial government research stations and agricultural colleges for field trials and demonstrations of new technologies and then pass these on to extension services for scaling up. The budget of the ARC must increase by 15% per annum for at least 5 years to restore capacity of producing cutting edge research that can be applied in the agricultural sector, particularly that which is relevant to smallholder farmers. With that in mind, the new maize hybrid that is drought tolerant and stalk borer resistant is highly commendable and appreciated. AFASA wishes to see more of such outputs from the ARC crop and horticulture varieties, vaccines, livestock breeds and stock feeds.

- **Ondestepoort Biological Products (OBP)** should focus on the production of strategic vaccines, which the private sector would or cannot produce for various reasons. AFASA recommends that OBP be privatised to a maximum of 49% but ensure that the state remains with a controlling interest.

- **The Perishable Products Export Control** Board (PPECB) largely serves the interest of large scale commercial industries and should put more effort to actively facilitate market access for smallholder vegetable producers in line with the national priorities for the development of smallholder producers.
- **National Agriculture Marketing Council (NAMC):** There are duplication of functions between the NAMC and some Directorates in DAFF and the dti, which could be streamlined for more efficient use of financial and human resources.
- **The Landbank**. AFASA recommends that the Landbank focuses on funding land acquisitions, long term infrastructure loans and AgriBEE deals. The rest of development finance for production loans should be left to the farmers' cooperative bank and the envisaged SPV.

AFASA further proposes that DRDLR should transfer all the land leases to the Landbank who can then administer long term loans on the back of the leases to qualifying farmers.

Conclusion

South African agriculture is entering a new and exciting era in which land reform must be progressive and yet provide certainty to the entire sector that it will not be negatively impacted; sustainable production must be stepped up to meet projected global high demand for food in the next 35 years in the face of climate change, and the shrinking government financial resources. The above mean that the sector must work smartly to ensure that the desired growth and transformation are achieved. We believe that this will not happen haphazardly but through meticulous planning and a detailed, clear pathway of how such plans will be achieved. Thus AFASA subscribes to the development of long term plans with tangible goals (such as the NDP vision for 2030), and the agriculture policy action plan as the road map to get there.

AFASA has committed to play its part in making the South Africa vision possible. The association has established a consortium of experts whose primary aim is to provide comprehensive support to smallholder farmers in order to optimise food production and assist government to implement its policies and programmes. In line with the Memorandum of Understanding with DAFF, AFASA puts forward this agency, known as Agricultural Development Agency of Southern Africa (ADASA) to implement these 10 programmes on its behalf

AFASA implores government to make it feasible to achieve the South African vision by providing an enabling and coordinating environment throughout its various departments, departmental agencies and the three spheres of government, as Minister Zokwana committed to in the recent budget vote speech.