



Agriculture and land affairs

The Department of Agriculture aims to lead and support sustainable agriculture and promote rural development through:

- providing access to sufficient, safe and nutritious food
- eliminating skewed participation and inequity in the sector
- maximising growth, employment and income in agriculture
- enhancing the sustainable management of natural agricultural resources and ecological systems
- ensuring effective and efficient governance
- ensuring knowledge and information management.

Agriculture plays an important economic role and employs a significant number of people. It has a

considerable impact on rural areas and most importantly, on food supply.

Agricultural Sector Plan

The Department, through its socio-economic development initiatives, is committed to reduce poverty in South Africa and on the continent, broaden access to agriculture, and increase productivity and profitability within the agriculture sector.

The Agricultural Sector Plan, adopted in 2001, consists of three core objectives:

- equitable access and participation: the Plan aims to ensure equitable access to and participation in agricultural opportunities, to deracialise land and



enterprise ownership and to unlock the full entrepreneurial potential in the sector

- global competitiveness and profitability: the Plan seeks to enhance profitability through sustained global competitiveness in the agricultural sector's input supply, primary production, agriprocessing and agritourism industries
- sustainable resource management: the Plan aims to enhance farmers' capacity to use resources in a sustainable manner and to ensure best practices in the use and management of natural resources.

The Plan is the result of collaboration between government, Agri SA and the National African Farmers' Union (NAFU).

Agricultural economy

South Africa has a dual agricultural economy, comprising a well-developed commercial sector and a predominantly subsistence-orientated sector in the rural areas. About 13% of South Africa's surface area can be used for crop production. High-potential arable land comprises only 22% of the total arable land. Some 1,3 million hectares (ha) are under irrigation.

The most important factor limiting agricultural production is the availability of water. Rainfall is distributed unevenly across the country. Almost 50% of South Africa's water is used for agricultural purposes.

The country can be subdivided into a number of farming regions according to climate, natural vegetation, types of soil and the type of farming practised. Agricultural activities in these regions range from intensive crop production and mixed farming in winter-rainfall and high summer-rainfall areas, to cattle-ranching in the bushveld, and sheep-farming in the more arid regions.

Due to the country's geographical location, some parts of South Africa are prone to drought. The low levels of rainfall in the 2002/03 summer season led to drought conditions that affected Limpopo, Mpumalanga, KwaZulu-Natal, the Northern Cape and parts of the Eastern Cape, North West and the Free State.

Primary commercial agriculture contributes about 3,7% to the Gross Domestic Product (GDP) of South Africa and about 7,5% to formal employment. However, there are strong backward and forward linkages into the economy, so that the agro-industrial sector is estimated to comprise 15% of GDP.

Today, South Africa is not only self-sufficient in virtually all major agricultural products, but in a normal year it is also a net food exporter.

Despite the farming industry's declining share of GDP, it remains vitally important to the economy and the development and stability of the southern African region.

For the past five years, agricultural exports have contributed on average about 8% (8,4% in 2003) of total South African exports.

Normally, South Africa is a net exporter of agricultural products in Rand value. The largest export groups are wine; citrus; sugar; grapes; maize; fruit juice; wool; and deciduous fruit such as apples,

pears, peaches and apricots. Other important export products are non-alcoholic beverages, food preparations, meat, avocados, pineapples, peanuts, preserved fruit and nuts, hides and skins, and dairy products.

Genetically Modified Organisms (GMOs)

South Africa does not have ideal conditions for crop production. Less than 12% of its land is arable, and serious climatic constraints, such as periodic droughts, hinder agricultural production.

Despite these circumstances, productivity must increase to meet the growing population's need for food. Recent developments in biotechnology have brought hope in tackling the challenge of increasing food production. Genetic modification provides a way of meeting the growing demand for food without placing even greater pressure on scarce resources.

The GMO Act, 1997 (Act 15 of 1997), was implemented on 1 December 1999, making provision for the regulation of GMOs in South Africa, particularly new biosafety assessments.

In terms of the Act, permits are issued for trials and the commercial release of any GMO crops in the country, to ensure contained cultivation and reduced environmental impact.

The objectives of the Act are to increase crop yield while protecting biodiversity. In 2001, the Department of Agriculture approved the planting of three commercial Genetically Modified (GM) crops: insect-resistant cotton, herbicide-resistant cotton and insect-resistant maize.

Exports						
	1999	2000	2001	2002	2003	Average: five years
Total South African products ('000 000)	R165,1	R210,0	R245,4	R314,9	R274,6	R242,0
Total agricultural products ('000 000)	R14,8	R15,8	R20,1	R25,5	R23,0	R19,8
Agriculture as % of total exports	8,95	7,53	8,18	8,08	8,37	8,18

Source: Directorate: Agricultural Statistics, Department of Agriculture

There are no GM crops planted for human consumption in South Africa. Neither are there fresh GM fruit and vegetables on sale in the country. Imported engineered soya is used in processed meat and other locally produced food.

In terms of the GMO Act, 1997, the Advisory Committee, comprising scientific experts, conducts risk assessments to determine if a particular GMO is safe for humans, animals and the environment. The Foodstuffs, Cosmetics and Disinfectants Act, 1972 (Act 54 of 1972), oversees the safety of food in South Africa.

Sustainable resource management and use

South Africa, at most times, is able to meet its own food requirements with considerable food exportation.

However, improved information about the potential and limitations of the natural resource base is essential for good management decisions.

An inventory of soils, terrain forms and climate (land types) was undertaken by the Agricultural Research Council's (ARC) Institute for Soil, Climate and Water. The National Land Type Survey, completed in 2001, assists land-use planning and decision-making. Data from this and other more detailed soil and climate surveys are integrated into a comprehensive Agricultural Geo-referenced Information System (GIS), which provides access to information, via the Internet, on agricultural potential and land suitability.

Although it is generally recognised that soil degradation is a problem, there have been little reliable data systematically collected over time. Soil degradation is largely related to the decline in soil organic matter. Monoculture cereal production, intensive tillage, short-to-no fallow, and limited crop rotation have contributed to this in the commercial sector.

Excessive fuelwood collection, inappropriate land-use, population density and overgrazing are the main causes of soil degradation in communal areas. In addition, it is estimated that about 60% of

the cropland area is moderately to severely acid, and probably at least 15% is affected by subsoil acidity.

Physical degradation

Physical degradation of South Africa's agricultural land results in soil erosion by both water and wind. It has been estimated that water erosion affects about 6,1 million ha of cultivated soil in South Africa, and wind erosion about 10,9 million ha. Another degradation problem is compaction within the soil profile, especially on fine sandy soils where, for example, maize yields can be adversely affected by some 30% to 40%.

Urban spread, industrialisation and mining (such as the opencast coal-mining in Mpumalanga) also impact on the sustainable use of agricultural land.

The Conservation of Agricultural Resources Act, 1983 (Act 43 of 1983), allows the national Department of Agriculture to exercise control over the utilisation of South Africa's natural agricultural resources. The Act provides for the conservation of these resources by maintaining the land's production potential, eliminating and preventing erosion and bush encroachment, protecting vegetation, and combating weeds and invader plants. The Act generally applies to agricultural land in South Africa, except for the sections dealing with weeds and invader plants, which also apply to urban areas.

The Conservation of Agricultural Resources Act, 1983, as amended, details specific requirements and prohibitions applicable to land users.

To promote natural agricultural resource conservation, policies, norms, standards and guidelines have been developed, as has a national agricultural resource audit division and a conservation GIS. National long-term grazing capacity norms were derived from National Oceanic and Atmospheric Administration satellite data, as well as seasonal norms, taking into account the impact of climate on biomass production. At farmer level, conservation committees can be appointed to promote the conservation of the natural agricultural resources in the area concerned.

International agreements and conventions

South Africa is a signatory to a number of international agreements and conventions that require the matter of sustainable resource-use and management to be addressed in a responsible way.

Agenda 21 is an action plan and blueprint for sustainable development, and was one of five documents adopted by more than 178 governments at the United Nations (UN) Conference on Environment and Development (UNCED) in Rio de Janeiro in 1992. Specific to sustainable resource-use is Chapter 14 on promoting sustainable agriculture and rural development.

International conventions that apply to aspects of sustainable resource-use include the Convention on Biological Diversity, the UN Framework Convention on Climate Change, and the Convention to Combat Desertification (CCD). The CCD requires South Africa to draw up a national action programme, which will be integrated into a regional programme for the Southern African Development Community (SADC) region. All these activities are receiving attention under the leadership of the Department of Environmental Affairs and Tourism, involving all stakeholders, including the national and provincial departments of Agriculture.

Production

The prices of agricultural products increased by 2,6% from 2002 to 2003. During 2002/03, the estimated total volume of agricultural production was 3% lower than during 2001/02. Producer prices of agricultural prices increased, on average, by 19,6% from 2001/02 to 2002/03, compared with an increase of 22% during the previous year.

In 2002/03, producer prices of horticultural products increased by 19,4% compared with 2001/02.

During the same period, the prices of fresh vegetables increased significantly, by 43%, while the prices of fruit increased by 6,4%.

The producer prices of animal products were 17,4% higher in 2002/03 than in 2001/02. The price of pastoral products increased by 25%, and that of dairy, slaughtered stock and poultry by 11,3%, 23,8% and 15,2%, respectively.

During 2002/03, the producer price of field crops was 23% higher than during 2001/02.

The total gross value of agricultural production (total production during a production season valued at the average basic prices received by producers) for 2002/03 was estimated at R68 680 million (R66 818 million in 2001/02) – an increase of 2,8%.

Farm income

The gross income of producers (the value of sales and production for other uses plus the value of changes in inventories) for 2002/03 amounted to R70 037 million in 2002/03 compared with R62 244 million in 2001/02 – an increase of 12,3%.

By June 2003, the gross income from field crops had increased by only 5,6% to R24 508 million, much less than the 39,4% increase during the preceding 12 months. This was mainly because of lower levels of production of some of the important summer grains, as well as the downward trend in the prices that farmers received for summer crops during 2003.

The gross income from horticultural products increased by 17,2%, from R15 596 in 2001/02, to R18 279 million in 2002/03.

The income from subtropical fruit increased by 18,6%, from R816 million in 2001/02 to R968 million in 2002/03, while that from citrus fruit remained at the same level.

The income from vegetables amounted to R6 437 million in 2002/03, up from R5 034 million in 2001/02 – an increase of 27,7%.

Field crops and horticulture

The largest area of farmland is planted with maize, followed by wheat and, to a lesser extent, sugar cane and sunflowers.



Formal agriculture provides employment for about 900 000 farm workers.

In addition, the small-holder sector provides full- or part-time employment for at least 1,3 million households.

The grain industry is one of the largest in South Africa and is also a very strategic one.

This industry produces between 25% and 33% of the total gross value of agricultural production. The gross value of grain production is usually around R12 billion, but in the 2001/02 season, it increased to R22 billion as a result of, among other things, higher prices.

Grain South Africa represents a total of 17 000 grain producers, of whom 11 000 are from disadvantaged communities. These farmers represent roughly 90% of all grain produced in South Africa.

Other major role-players include the silo, milling, baking and animal-feed industries, all of which have undergone a number of changes following the deregulation of the grain industry.

Maize

The maize industry plays a very important role in the economy. Maize is the largest locally produced field crop, and the most important source of carbohydrates in the SADC for animal and human consumption.

South Africa is the main maize producer in the SADC, with an average production of about 8,8 metric tons (mt) per annum over the past 10 years.

It is estimated that more than 9 000 commercial producers of maize are responsible for the major part of the South African crop, while the rest is produced by thousands of small-scale producers.

Maize is produced mainly in North West; the north-western, northern and eastern Free State; the Mpumalanga Highveld; and the KwaZulu-Natal Midlands. Local commercial consumption of maize amounts to about 8,0 mt, and surplus maize is usually exported.

Wheat

Wheat is produced in the winter-rainfall areas of the Western Cape and the eastern parts of the Free State. Production in the Western Cape is the highest, but there are considerable annual fluctuations. The price of wheat increased by 14,1% in 2002/03.

Wheat is imported to meet local requirements.

Barley

Barley is produced mainly on the southern coastal

plains of the Western Cape. The area where barley is planted was estimated at 84 220 ha for the 2003/04 production season, and production was estimated at 235 821 t.

Ground-nuts

Ground-nuts are grown mainly in the Free State, North West and the Northern Cape. Ground-nut planting increased by 25% from 49 800 ha in 2002/03 to 62 300 ha in 2003/04.

Sunflower seed

South Africa is the world's 10th-largest producer of sunflower seed. Sunflower seed is produced in the Free State, North West and on the Mpumalanga Highveld, as well as in Limpopo.

Lucerne seed

For many years, Oudtshoorn, De Rust and Douglas were the only areas in South Africa in which lucerne seed was produced in reasonable quantity. Today, the Oudtshoorn district is responsible for about 90% of the lucerne seed produced in South Africa. Between 100 to 120 lucerne bales per hectare can be produced every three weeks, provided enough water is available.

Sorghum

Sorghum is cultivated mostly in the drier parts of the summer-rainfall areas such as Mpumalanga, the Free State, Limpopo, North West and Gauteng.

Sugar

South Africa is ranked as the world's 13th-largest sugar producer. Sugar cane is grown in 15 cane-producing areas extending from northern Pondoland in the Eastern Cape, through the coastal belt and Midlands of KwaZulu-Natal, to the Mpumalanga Lowveld.

An estimated 2,5 mt of sugar is produced per season. About 50% of this is marketed in southern Africa. The remainder is exported to numerous markets in Africa, the Middle East, North America and Asia. Based on actual sales and selling prices in 2003/04, it is estimated that the South African sugar industry contributed R1,7 billion to South Africa's foreign exchange earnings.

The producer price of sugar cane increased by 6,6% in 2002/03.

The established sugar industry aims to redistribute at least 78 000 ha of sugar-producing land to Black farmers by 2015, as part of its contribution to the 30% national target redistribution of agricultural land. In 2004/05, government committed R6 million towards the first phase of the programme.

Gross value of agricultural production, 2003 (R'000)	
Field crops	
Maize	9 110 962
Wheat	2 423 009
Hay	1 880 944
Grain sorghum	383 270
Sugar cane	3 099 377
Ground-nuts	338 009
Tobacco	716 674
Sunflower seed	1 349 131
Cotton	156 283
Other	1 204 242
Total	20 661 901
Horticulture	
Viticulture	2 597 442
Citrus fruit	3 629 915
Subtropical fruit	1 292 672
Deciduous and other fruit	4 632 923
Vegetables	4 100 382
Potatoes	2 593 362
Other	1 229 034
Total	20 075 730
Animal products	
Wool	888 976
Poultry and poultry products	12 142 833
Cattle and cattle slaughtered	5 807 588
Sheep and goats slaughtered	1 703 703
Pigs slaughtered	1 162 526
Fresh milk	3 441 831
Milk for dairy products	1 546 204
Other	1 565 902
Total	28 259 563
Grand total	68 997 194

Preliminary source: Agricultural Statistics: Department of Agriculture

Deciduous fruit

Deciduous fruit is grown mainly in the Western Cape and in the Langkloof Valley in the Eastern Cape. Smaller production areas are found along the Orange River and in the Free State, Mpumalanga and Gauteng. This industry's export-earnings represent 12% of the country's total earnings from agricultural exports. In 2002, apples made up the largest percentage of the crop (38%), while pears totalled 21% and grapes 19%. About 76% of the total crop was produced in the Western Cape, 11% in the Northern Cape, and 13% in the Eastern Cape.

In 2002/03, the price of fruit increased by 6,4%.

Wine

South Africa is the 10th-largest wine producer in the world.

About 110 200 ha of land are under cultivation with about 317 million vines. About 84% of wines are produced by co-operatives. Some 4 435 primary wine producers employ about 67 000 people. According to the South African Wine and Spirits Export Association, the export of white wine increased from 20 million litres (ML) in 1992 to 239 ML in 2003.

In 2003/04, South Africa harvested 1 257 219 t of grapes which resulted in the production of 974 ML of wine, as compared against 1 233 689 t, and about 956 ML of wine in 2002/03. This represents an increase of 18,2 ML compared with the 2002/03 vintage.

The Wine and Spirits Agreement between South Africa and the European Union (EU) was signed on 28 January 2002.

The Agreement improves access for South African wine and spirits to the large European market. Applying an annual duty-free tariff quota of 42 ML ensures better access for South African wines. In addition, the EU makes available an amount of 15 million Euro for restructuring the South African wine and spirits industry.

Part of the Agreement involves phasing out names traditionally used in South Africa for specific types of wines. The names 'port' and 'sherry' were to be phased out over five years for exports to non-

SADC markets, starting from 1 January 2000. They must be phased out of all markets after 12 years. South Africa also has to phase out the names *grap-pa*, *ouzo*, *korn/kornbrand*, *jägertee* and *pacharan* within five years of signing the Agreement.

Citrus and subtropical

Citrus production is largely limited to the irrigation areas of Limpopo, Mpumalanga, the Eastern and Western Cape, and KwaZulu-Natal.

A total of 1,9 mt of citrus was produced in 2002/03.

Pineapples are grown in the Eastern Cape and northern KwaZulu-Natal. Other subtropical crops such as avocados, mangoes, bananas, litchis, guavas, pawpaws, granadillas, and macadamia and pecan nuts are produced mainly in Mpumalanga and Limpopo at Levubu and Letaba, and in the subtropical coastal areas of KwaZulu-Natal and the Eastern Cape.

In 2002/03, South Africa produced 344 000 t of subtropical fruit.

Potatoes

About 40% of the country's potato crop is grown in the high-lying areas of the Free State and Mpumalanga. Limpopo, the Eastern, Western and Northern Cape, and the high-lying areas of KwaZulu-Natal are also important production areas. About two-thirds of the country's total potato crop is produced under irrigation.

Of the total crop, 50% is delivered to fresh-produce markets and a further 18% is processed. The South African potato-processing industry has grown tremendously over the past few years. This growth took place primarily in the three main disciplines of the processing industry, namely crisps, chips and French fries. Frozen French fries comprise 44% of the total processed potato products in South Africa.

In terms of gross income to the grower (apart from potatoes, which contribute 40%), tomatoes, onions, green mealies and sweetcorn are probably the most important vegetable crops.

These crops contribute 38% to the income derived from vegetables.

The income from potatoes increased by 28%, from R2 006 million in 2001/02, to R2 579 million in 2002/03.

Tomatoes

Tomatoes are produced countrywide, but mainly in Limpopo, the Mpumalanga Lowveld and Middleveld, the Pongola area of KwaZulu-Natal, the southern parts of the Eastern Cape, and the Western Cape.

Onions

Onions are grown in Mpumalanga; in the districts of Caledon, Ceres and Worcester in the Western Cape; and at Venterstad and adjoining areas in the southern Free State.

Cabbages

Cabbages are also grown countrywide, but are concentrated in Mpumalanga and the Camperdown and Greytown districts of KwaZulu-Natal.

Cotton

Cotton is cultivated in Mpumalanga, Limpopo, Northern Cape, KwaZulu-Natal and North West. It constitutes 74% of natural fibre and 42% of all fibre processed in South Africa. Cotton is grown under irrigation as well as in dry-land conditions.

Cotton under irrigation usually contributes almost as much to the national crop as that grown in dry-land conditions, although the number of hectares under dry-land conditions are much more than those under irrigation. Seventy-five percent of local production is harvested by hand. In 2002/03, the price of cotton increased by 10,5%.

Black farmers are being assisted to grow cotton on 9 000 ha of land in four provinces.

A Strategic Plan for the South African Cotton Sector has been developed, aimed at:

- growing farm output to a stable 370 000 lint bales by 2007
- broadening participation to enable emerging farmers to deliver an average of 100 000 lint bales annually by 2007
- raising productivity by training at least 60% of small growers by 2007
- improving research, extension services and

technology transfer; expanding exports by value, diversity, country of destination and client base; and accelerating the elimination of unfair competition through promoting regional and international co-operation, and through more effective lobbying in international trade fora.

Tobacco

Virginia tobacco is produced mainly in Mpumalanga and Limpopo, with smaller quantities of Oriental tobacco being produced in the Western and Eastern Cape. There are more than 1 000 growers in the country, who produce an annual average of 34 million kilograms on about 24 000 ha of land. The crop represents 173 different grades of Virginia tobacco and five different grades of Oriental tobacco.

Tea

Honeybush tea grows mainly in the coastal and mountainous areas of the Western Cape but also in certain areas of the Eastern Cape. The honeybush has grown into a commercial crop, with the production of more than 100 t of processed tea per year. The industry has seen an improvement in the quality of tea and the establishment of export standards, the construction of a large processing and packaging facility in Mossel Bay, increased consumer awareness, the appearance of several brand names on supermarket shelves, and a growing overseas market.

Rooibos tea is an indigenous herb produced mainly in the Cedarberg area of the Western Cape.

Production of important field crops and horticultural products, 2003 ('000 t)

Maize	9 705
Wheat	1 547
Sugar cane	20 419
Grain sorghum	264
Ground-nuts	67
Sunflower seed	682
Deciduous and other soft fruit	1 781
Citrus fruit	1 979
Subtropical fruit	672
Vegetables	2 081
Potatoes	1 487

Preliminary source: Agricultural Statistics, Department of Agriculture

In 2003, the demand for *rooibos* was estimated to be 3 800 t compared with 3 500 t exported in 2002. The active producers of *rooibos* tea are estimated at 320, ranging from small to large farming enterprises.

Ornamental plants

Ornamental plants are produced throughout the country, but production aimed particularly at the export market is concentrated in the central parts of Limpopo, Mpumalanga and Gauteng. Ornamental-plant production includes nursery plants, cut flowers and pot plants. The country's most important plant export products are gladioli, proteas, bulbs, chrysanthemum cuttings and roses.

Amaryllis bulbs are a lucrative export product to the United States of America (USA). In support of the protea and *fynbos* industry, the ARC is involved in several ongoing research activities.

The *fynbos* industry is being transformed from 'wild harvesting' to 'cultivation', with an array of cultivars planted. Further *fynbos* species have potential for development as crops, provided the necessary research funding can be secured. Dried flowers form an important component of the *fynbos* industry. A large variety of proteas, cone-bushes and other products are well-established in the marketplace.

Ornamental plants are produced throughout the country, with greenhouse and open-field production concentrated mainly in Limpopo, Mpumalanga and Gauteng. The protea industry is mainly concentrated in the Western Cape.

Flowers

South Africa's indigenous flowers, such as, gladioli, nerine, freesia and gerbera, have undergone many years of extensive research in Europe, and have become major crops throughout the world.

South Africa is the leading exporter of protea cut flowers, which account for more than half of proteas sold on the world market. South African proteas and so-called Cape greens (*fynbos*) are mainly marketed in Europe.

Livestock

Livestock is farmed in most parts of South Africa.

Numbers vary according to climatic conditions. Stock-breeders concentrate mainly on the development of breeds that are well-adapted to diverse climatic and environmental conditions. The latest estimates for cattle and sheep are 13,8 million and 28,8 million, respectively. South Africa normally produces 85% of its meat requirements, while 15% is imported from Namibia, Botswana, Swaziland, Australia, New Zealand and European countries.

The livestock industry is currently the largest national agricultural sector. The local demand for products, which generally outstrips production, creates a dependence on imports, even though there are untapped production reserves in the communal farming sector.

Dairy-farming

Dairy-farming is practised throughout South Africa, with the highest concentration of dairy farms in the eastern and northern Free State, North West, the KwaZulu-Natal Midlands, the Eastern and Western Cape, the Gauteng metropolitan area, and the southern parts of Mpumalanga.

The ARC participates fully in the Multiple Across-Country Evaluation for all four major dairy breeds in South Africa, namely Holstein, Jersey, Guernsey and Ayrshire. A new rye grass cultivar developed by the ARC Range and Forage Institute can improve the milk production of a Jersey herd by 0,9 litres (l) per cow per day, and the production of a Holstein herd by 1,5 l per cow per day.

The South African Milk Federation co-ordinates industry matters, including the information and research functions, and is financed by means of voluntary contributions. Market forces determine prices. The dairy industry is an important employer as some 4 300 milk producers employ about 60 000 farm workers and indirectly provide jobs to some 40 000 people. Milk production for 2003/04 was estimated at 2 000 ML.

Stock-farming

Cattle ranches are found mainly in the Eastern Cape, parts of the Free State and KwaZulu-Natal, Limpopo and the Northern Cape. The indigenous Afrikaner and Nguni, and the locally developed

Bonsmara and Drakensberger, are popular beef breeds, but British, European and American breeds, such as Charolais, Hereford, Angus, Simmentaler, Sussex, Brahman and Santa Gertrudis are maintained as pure breeds or used in cross-breeding.

The Taurus Livestock Improvement Co-operative (in Irene, Gauteng) is one of the companies providing the country's beef farmers with an annual average of some 110 000 units of semen, and the dairy industry with 580 000 units of semen, for use in artificial insemination.

Sheep-farming is concentrated mainly in the Northern and Eastern Cape, Western Cape, Free State and Mpumalanga, with Ermelo in Mpumalanga being one of the largest wool-producing districts. Most sheep are fine-woolled Merinos (50%). Other breeds include the locally developed Afrino (a woolled mutton breed adapted to arid conditions), the South African Mutton Merino, the Dohne and the Merino Land Sheep. Non-wool breeds such as the Dorper, a highly productive, locally developed mutton breed for arid regions, and the woolled Merino account for most of South Africa's mutton production.

Karakul sheep are farmed in the more arid areas. Some 20 173 Karakul pelts were produced during 2002/03. The gross value of these pelts is estimated at R3 million.

The indigenous meat-producing Boer goat accounts for about 30% of all commercial goats. The Angora goat is used for mohair production. South Africa has about 3 500 Angora farmers.

The gross income from animal products increased by 15,7%, from R23 548 million in 2001/02 to R27 249 million in 2002/03. Slaughtered cattle and calves earned producers R5 754 million in 2002/03, compared with R4 629 million in 2001/02 – an increase of 24,3%. The average production of beef increased by 22,8% during 2002/03.

Poultry and pig-farming

The poultry and pig industries are more intensive than the extensive sheep and cattle industries, and are located on farms near metropolitan areas such as Gauteng, Durban, Pietermaritzburg, Cape Town

and Port Elizabeth. The predominant pig breeds are the South African Landrace, the Large White, the Duroc and the Pietrain.

South Africa's annual poultry meat production is estimated at 960 000 t. Broiler production contributes about 82% to total poultry-meat production, with the rest made up of mature chicken slaughter (culls), small-scale and backyard poultry production, ducks, geese, turkeys and other specialised white-meat products.

Income from poultry and egg production amounted to R11 274 million in 2002/03, compared with R10 361 million in 2001/02 – an increase of 8,8%.

Commercial producers slaughtered an estimated 558 million broilers during 2003. The gross value of broilers and other fowls slaughtered during this period is estimated at R12 121 million.

South Africa accounts for 67% of world sales of ostrich products, namely leather, meat and feathers. The income from ostrich products is derived as follows: leather (50% – 70%), meat (30% – 45%) and feathers (5% – 15%).

The gross value for ostrich feathers and products during 2002/03 was estimated at R276,5 million.

Game-farming, aquaculture and bee-keeping

South Africa has more game and a wider variety of game species than most countries. Game-farming has grown over the years, and today it is a viable industry with great economic potential. The main game areas are in Limpopo, North West, Mpumalanga, the Free State, the Eastern Cape, the Karoo, the Kalahari in the Northern Cape, and the thorn scrub of KwaZulu-Natal.

Despite periodic droughts in the past, game numbers have consistently increased.

Livestock numbers, 2002 – 2003 (million)		
	2002	2003
Cattle	13 635	13 538
Sheep	29 034	28 780
Pigs	1 570	1 570
Goats	6 694	6 603

Source: Agricultural Statistics, Department of Agriculture

A descriptive game-production model has been developed for optimising intensive animal production on game farms. The model has the potential to increase the global produce of the game industry by between 8% and 15%.

The aquaculture industry in South Africa continues to make meaningful progress in cultivation technology, marketing strategy, marketing practice and scientific innovation. Mussels, trout, tilapia, catfish, oysters and *waterblommetjies* (Cape pondweed) are the major aquaculture species. Mussel-farming occurs mainly at Saldanha Bay.

The South African honey industry is still small, worth some R32 million annually.

Veterinary services

State Veterinary Services constantly guards against the introduction of animal diseases from outside South Africa. Existing animal diseases, which may be detrimental to the economy of South Africa and to human and animal health, are also controlled and combated. Stock in the high-risk areas is inspected at short intervals.

The Directorate: Animal Health of the national Department of Agriculture sets norms and standards for the delivery of veterinary services in South Africa.

Legislation provides the necessary powers to control diseases such as foot-and-mouth disease (FMD), swine fever, rabies and anthrax. South Africa, excluding the Kruger National Park and surrounding game reserves, is recognised as an FMD-free zone by the *Office International des Épizooties (OIE)*, the world animal health organisation.

Animal disease control is an important factor in ensuring the productivity of the livestock sector and promoting international trade in agricultural products.

Surveillance systems are in place to ensure that all agricultural products entering and leaving the country are free of disease and thus safe for human consumption. All ports are thoroughly monitored, making sure that imported and exported goods are disease-free.

Particular emphasis is placed on the control of borders with neighbouring countries to prevent the introduction of FMD.

In 2002/03, about R61 million in additional funds was allocated over two years to enhance the control of cross-border animal and plant diseases, and to maintain South Africa's FMD-free status through the South African Food, Quarantine and Inspection Services subprogramme.

Animal health and disease

The Department of Agriculture is responsible for the delivery of a number of critical regulatory and control services aimed at ensuring that the country is disease-free with respect to animals.

The Department was expected to introduce its Food Safety and Traceability Policy in 2004, as well as implement improved animal-disease control measures.

In association with the South African Police Service and the Airports Company of South Africa, the Department will launch a new inspection service at the country's ports of entry.

The new service was expected to be rolled out at Johannesburg International Airport by November 2004.

Since the Ministerial Treaty has been signed between South Africa, Zimbabwe and Mozambique, continuous State veterinary input through the Joint Management Board ensures that no undue animal-disease risks emanate from the Great Limpopo Transfrontier Park.

Onderstepoort Biological Products (OBP)

The OBP is a State-owned public company. It has the capacity and technology to produce veterinary vaccines and related biological products for local and international markets.

The OBP is the sole or main producer of at least 15 vaccines for African animal diseases, and eight vaccines in the world for tropical diseases. A vaccine bank is being established to assist in the rapid response to disease outbreaks in the country and region.

The OBP provides vaccines to fight major outbreaks of diseases such as CBPP (lung-sickness in cattle), lumpy-skin disease, Rift Valley fever, horse sickness and anthrax.

The OBP has also joined the Pan-African Vaccine Network to supply rinderpest and lung-sickness vaccines for Africa, and is involved in projects of the OIE, the World Health Organisation (WHO) and the EU to supply vaccines to African countries.

Pest control

The Department of Agriculture, in co-operation with the ARC and the Working for Water Programme of the Department of Water Affairs and Forestry, is involved in the chemical and biological control of invader plants.

Most countries have established Maximum Residue Limits (MRLs) for pesticides used in the control of pests and diseases, not only to safeguard consumer health, but also to minimise the presence of these residues in the environment.

As a condition of market access, products exported must comply with these residue standards. To ensure compliance with legislation, monitoring samples are drawn for analyses during quality inspections.

Exporters and producers are obliged to:

- comply with the requirements of the correct, approved use and application of pesticide remedies
- keep records of the chemical remedies used in spray programmes and as a post-harvest treatment, and provide this information on request to the responsible authorities
- verify the MRLs with their importer or agent in the relevant country
- keep up with the registration and re-registration processes of pesticides within South Africa as well as in importing countries
- inform the Directorate: Plant Health and Quality of any rejections by importing country authorities due to residues.

Migratory pest control

In terms of the Agricultural Pests Act, 1983 (Act 36 of 1983), the Department is continuously involved in the control of migratory pests such as the quelea, locust and blackfly.

Quelea is controlled by aerial chemical spraying and explosives.

Locust outbreaks are controlled by knapsack sprayers, sprayers mounted on bakkies and by aerial chemical sprayers if the outbreak is very high.

Blackfly is controlled by aerial and boat chemical spraying, depending on the water level of the river.

Research conducted by the ARC contributes towards maximising South Africa's ability to provide timely and reliable forecasts of brown locust outbreaks, both for its own food-security needs and those of neighbouring countries in the brown locust invasion area.

The South African Pest Control Association (SAPCA) is the official representative of the pest-, termite- and woodborer-control industries. All SAPCA-qualified inspectors have to register with the Department of Agriculture.

South Africa liaises with other countries and international organisations to ensure technology transfer on pest control.

Marketing

South Africa's agricultural marketing has undergone transformation since 1994 through the introduction of the Marketing of Agricultural Products Act, 1996 (Act 47 of 1996).

This Act has, over the past decade, dramatically changed agricultural marketing policy and practice to ensure that it occurs in a free environment. The deregulation process was aimed at ensuring that farmers and agribusiness position themselves as players in the globally competitive environment.

The deregulation process entailed the closing of agricultural marketing boards, phasing out import- and export-control measures, eliminating subsidies, and introducing tariffs to protect the domestic agricultural industry value chains against unfair international competition.

Since deregulation, the sector has begun to adjust to the high levels of competitiveness across most value chains. Deregulation has further created many opportunities and has resulted in an increase in the number of new entrepreneurs participating in different nodes of agricultural marketing value chains, including producers, processors, traders and providers of other supplementary services to ensure

efficiency in the operation of the overall marketing value chains.

The phasing out of controls and the closure of marketing boards resulted in a shortage of essential services that were formerly provided by co-operatives and marketing boards, ranging from storage, grading, deliveries, and value adding, to information dissemination, research, etc.

As a result, specialised marketing support institutions such as the South African Futures Exchange (SAFEX) and the Agricultural Futures Market of the Johannesburg Securities Exchange (JSE) were established to provide all market participants with a much-needed price-risk-management mechanism on grain trade.

The Futures Market was established to ensure that the price of grain in South Africa reflects the market fundamentals of domestic demand and supply, regional demand and supply, and import and export parity pricing. SAFEX is generally used to hedge adverse price movements.

The South African Grain Information Service was established by the grain industry to promote information collection and dissemination and research, and also to deliberate on issues around market access.

Other specialised commodity-oriented organisations have also been established.

National Agricultural Marketing Council (NAMC)

The NAMC was established in 1997 in terms of the Marketing of Agricultural Products Act, 1996, as amended by Act 59 of 1997 and Act 34 of 2001.

The objectives of the Act are to:

- increase market access for all market participants
- promote efficiency of the marketing of agricultural products
- optimise export earnings from agricultural products
- enhance the viability of the agricultural sector.

The mandate of the NAMC is, when requested by the Minister or of its own accord, to investigate the establishment, continuation, amendment or revocation of statutory measures and other regulatory

measures affecting the marketing of agricultural products.

The NAMC also evaluates the desirability, necessity and efficiency of the measures and, if necessary, proposes alternatives to the establishment, continuation, amendment or repeal of a statutory measure or other regulatory measures. It reports to and advises the Minister accordingly.

The NAMC continues to do important work, monitoring the agricultural marketing environment to promote the existence of a more diverse and competitive sector. The Outreach Programme – which empowers emerging farmers with information – had reached 5 886 such farmers by March 2004.

Attendance at agricultural shows, farmers' days, conferences and workshops offers the NAMC the opportunity to disseminate information to farmers.

Land administration

The Department of Agriculture, through the Directorate: Farmer Settlement and Development, controls and administers 673 253 ha of State agricultural land.

State agricultural land is divided as follows:

- some 581 864 ha of land expropriated by the South African Development Trust
- some 91 388 ha of commercial land purchased from insolvent estates and properties transferred by the Department of Public Works in terms of Section 7 of the Disposal Act, 1961 (Act 48 of 1961).

The primary goal of the Directorate is the internal administration of State agricultural land, with the aim of farmer settlement and ownership reform.

Food security

The Cabinet approved the Integrated Food Security and Nutrition Programme in July 2002 as one of the key programmes of the Social Cluster. The Programme aims to achieve physical, social and economic access to safe and nutritious food for all South Africans.

Its goal is to eradicate hunger, malnutrition and food insecurity by 2015.

By June 2004, the Department, working with the provincial departments of Agriculture, had distributed production support packages to 37 000 of its target of 50 000 households.

The project started in Limpopo by providing poor people with day-old chickens, point-of-lay hens and young lactating cows (heifers), which, in various combinations, form the agricultural starter pack. These in turn produce milk, eggs and meat, and in some cases there is even surplus production, which enables people to earn an income.

The Department of Agriculture has also joined forces with its neighbouring SADC countries and adopted an action plan for food security. This includes the establishment of domestic support measures for vulnerable small-holder farmers, to ensure access to key agricultural input, and to encourage research and the development of affordable farming equipment.

The Directorate: Plant Health and Quality drafted the Draft Food Security Bill to ensure not only food safety, but also the quality of agricultural products, including fresh fruit and vegetables, exported within the current control system. By implementing the prevention-is-better-than-cure rule, control is transferred from end-product testing to the design and manufacture of such products.

In any international exchange of plants and plant products, there is a risk that pests and diseases might be introduced into the territory of the importing country. In view of this, the South African Government is a signatory member of various multi-national agreements.

The most important, in terms of safeguarding the country's agricultural resources and natural environment, are the International Plant Protection Convention (IPPC) and the World Trade Organisation (WTO) Agreement on the Application of Sanitary and Phytosanitary Measures (WTO-SPS).

Human Rights Commission and UN Council for Human Rights officials have hailed the Draft Bill as the first of its kind to comprehensively address all pertinent food-related issues. The document will be used as a basis for discussions in Africa and at the UN. Normal procedures on new legislation and policy guidelines will follow when discussions are finalised.

National Food Pricing Monitoring Committee (FPMC)

The FPMC was established in January 2003 in terms of Section 7 of the Marketing of Agricultural Products Act, 1996. The Committee was tasked with monitoring the prices of food, particularly basic foodstuffs, and investigating any sharp or unjustified food-price increases.

The investigation provided recommendations on required productivity improvements in the areas of market inefficiencies and distortions, incidents of predatory pricing and monopolistic tendencies, as well as collusive and discriminatory practices.

The Minister of Agriculture and Land Affairs, Ms Thoko Didiza, released the results of the second and final FPMC Report in August 2004.

The Report confirmed the initial sharp increase in basic food commodity prices, notably maize.

This initial shock spread through several food value chains, followed by a levelling off of price increases for virtually all food items, and even a decline for some products such as red meat, maize meal, samp and cooking oil.

Between January and October 2003, the Committee found that 11 out of 24 food prices that they had monitored had declined. However, it was discovered that prices of products such as milk powder, peanut butter, margarine and onions, increased too far above food-price inflation in 2003.

According to the Report, the analysis of food-price inflation for different income groups showed that poor households experienced higher inflation rates than wealthier households. At its peak in October 2002, poor households were confronted with a year-on-year food price inflation of 23,1%,

while wealthier households experienced a food price inflation of 19%.

The benefit to the poor of the recently lowered prices for most staple foods is reflected in a food inflation rate of 3,35% compared with that of wealthier households of 4,21%.

The Report states that in September 2003, the total cost of the basket of food items monitored by the Committee was only 1,5% cheaper than in September 2002.

By June 2004, the same basket of food was 3% cheaper than in December 2003.

Regional issues

South Africa participates in the Regional Advisory Committee (RAC) of the Regional Food Security Training Programme (RFSTP).

The RFSTP has been developed over a five-year period as endorsed by the RAC. The activities of the RFSTP focus on three main areas: strengthening the supply of food-security training services, strengthening the effective demand for training and developing and sustaining regional markets for food-security-related training services.

The SADC has instituted the Subcommittee for Plant Protection, tasked with harmonising phytosanitary requirements in southern Africa. South Africa is also one of some 52 members of the Inter-African Phytosanitary Council, which was established in 1954. Regional plant-protection organisations such as these are able to provide valuable co-ordination for the activities and objectives of the IPPC at local level.

The Department of Agriculture was instrumental in the development of the New Partnership for Africa's Development's (NEPAD) agriculture programme, known as the Comprehensive African Agricultural Development Programme (CAADP).

It also developed the African Agriculture Development Programme to promote mutually beneficial partnerships with other SADC countries. Among other things, the Programme will assist in the implementation of programmes and projects that rest on the four pillars of the CAADP, namely land and water infrastructure, market access, food security, and research and development.



Ncera Farms (Pty) Ltd is a public company with the Department of Agriculture as the sole shareholder.

The project is managed to establish small and emerging farmers. The majority of the company's revenue is earned from the sale of fresh produce and livestock, and is expected to average around R1,2 million per year between 2004/05 and 2006/07.

International issues

As a signatory to the Rome Declaration, South Africa has committed itself to the implementation of the World Food Summit Plan of Action. For this purpose, South Africa reports annually to the World Committee for Food Security. South Africa is also collaborating with the Food and Agricultural Organisation (FAO) on the implementation of the Special Programme for Food Security, within the context of the Integrated Sustainable Rural Development Programme (ISRDP).

South Africa is an active participant in other international standard-setting bodies vital to its global market share, such as the IPPC and Codex Alimentarius.

Risk management

A working group has drafted an agricultural disaster-management plan that will be aligned with the guidelines provided by the Department of Provincial and Local Government.

The Government is moving forward with the development of an agricultural risk-management programme that includes agricultural risk insurance as one of the major tools in managing agricultural production risk.

In the 2003/04 financial year, the Department disbursed R235 million to farmers in eight provinces that were affected by cold spells, floods and drought.

The Directorate: Agricultural Risk Management delivers Early Warning Monthly Climate Advisories to farmers to enable them to anticipate possible natural disasters.

Drought management

The Draft Drought Management Strategy is being discussed with stakeholders. It will place the responsibility of coping with drought back on the normal production system. This will cause farmers to exercise greater prudence and make themselves less vulnerable to the effects of drought.

On 22 January 2004, the Cabinet allocated a further R250 million towards drought relief in some parts of the country, bringing the total amount set aside for this purpose to R500 million.

The money was intended for emergency relief to vulnerable rural communities (R60 million), the provision of fodder for livestock to established and emerging farmers (R30 million), water provision for human consumption (R100 million), water provision for livestock (R20 million), the safeguarding of boreholes (R5 million), and the prevention of communicable diseases in affected poor rural communities (R35 million).

An additional allocation for long-term interventions was expected to be considered in the 2005/06 financial year. Such interventions include improving the country's early warning capabilities and agricultural sector strategies to avoid long-term dependency on aid.

Agricultural risks insurance

The Department of Agriculture has drafted an Agricultural Risks Insurance Bill, a risk transfer which will assist farmers in managing production risk.

The Bill will assist farmers to recover from natural disasters. The insurance-based risk management programme allows the farmer, government and the private sector to share the risk involved in agricultural production.

Credit and assistance

The agricultural sector has, to date, been a net borrower, in that it borrows more than it saves. In fact, the total debt of South African farmers has grown by about 10% a year since 1995 – reaching R30 897 million by the end of 2003, compared with R9 495 million at the end of 1984.

The six major sources of credit for farmers are: banks (45%), agricultural co-operatives and agribusinesses (13%), the Land Bank (24%), private creditors (9%), other creditors and financial institutions (8%), and the State (1%).

By the end of 2003, the Department of Agriculture had recovered R1,1 billion of agricultural debts from commercial farmers who were assisted through loans from the former Agricultural Credit Board (dissolved in 1998), which has since been paid into the Agricultural Debt Account in accordance with the Agricultural Debt Management Act, 2001 (Act 45 of 2001).

Business and Entrepreneurial Development (BED)

The Directorate: BED is responsible for promoting participation and equity-sharing towards an inclusive, equitable and prosperous agricultural sector.

The ultimate aims are:

- unlocking the economic potential of idle-to-underutilised resources of emergent groups
- facilitating restructuring and the expansion of existing agribusinesses to enhance their competitiveness and contribution to the sector as well as the economy as a whole.

National LandCare Programme (NLP)

The NLP is a community-based and government-supported approach to the sustainable management and use of agricultural natural resources.

The vision of the NLP is for communities and individuals to adopt an ecologically sustainable approach to the management of South Africa's environment and natural resources, while improving their quality of life. It implies that cultivation, live-stock grazing and the harvesting of natural resources should be managed in such a manner that no further degradation (such as soil erosion, nutrient loss, loss of components of the vegetation, and increased run-off of water) occurs.

The overall goal of the NLP is to optimise productivity and sustainability of natural resources, result-

ing in greater productivity, food security, job creation and better quality of life for all.

LandCare themes are grouped into two areas, namely, focused investment (WaterCare, VeldCare, SoilCare, Eco-Agriculture and JuniorCare) and small community grants.

Projects are underway in Limpopo, Mpumalanga, North West, KwaZulu-Natal and the Eastern Cape.

The LandCare Implementation Framework serves as a guideline to empower resource-poor communities to develop LandCare groups and activities through awareness, training and education. This includes communication strategies directed towards rural community groups and young people. The Framework formulates policy and legislation to develop incentives for natural-resource management.

It also serves as a tool to establish and implement a monitoring system to evaluate progress, assess contemporary issues, and provide a basis for planning and research.

The Department also aims to promote its National Policy on Agricultural Land and Resource Management in all spheres of government and other stakeholders.

There are more than 340 LandCare projects throughout the country, funded to an amount of R240 million.

In line with the 2003/04 targets, the Department led and managed the LandCare projects, through which 5 000 ha of high-potential land were protected from degradation resulting from poor farming practices and erosion.

In 2004/05, the Department committed R72 million for closing dongas, clearing bush encroachment, and introducing new water-harvesting technologies to support poor Black farmers. Priority was given to areas such as Sterkspruit, Nongoma, the former Transkei and Ciskei, and the rural development nodes.

The Australian Government, through the Australian Agency for International Development, funded a R10-million capacity-building programme for LandCare over a period of three years, from April 2001 to June 2004.



South Africa hosted the 23rd Session of the Food and Agricultural Organisation's (FAO) Africa Regional Conference from 27 February to 6 March 2004 in Sandton, Johannesburg.

As part of the Conference, all African United Nations member states, together with the Minister of Agriculture, Ms Thoko Didiza, launched a special food-security programme at the Tswelopele Irrigation Scheme in Burgersfort, Mpumalanga. The R6-million programme is funded by the national Department of Agriculture. The FAO will provide technical expertise.

It is part of a continued programme of African Ministers of Agriculture to develop and facilitate the implementation of the New Partnership for Africa's Development Agricultural Sector Plan, known as the Comprehensive African Agriculture Development Plan.

Focused investment

The WaterCare theme targets Limpopo in particular, because of water shortages and the importance of water for irrigation. This theme establishes a framework for managing land and preventing the silt-up of dams for irrigation. WaterCare works in partnership with the community to develop action plans for managing and restoring irrigation schemes. The rehabilitation of irrigation schemes increases water supply and household food security. Furthermore, WaterCare promotes the development of techniques for water-resource management and encourages opportunities for training in this field.

There are 138 small-holder schemes in Limpopo. Under the WaterCare project, 28 schemes have been revitalised. It aims to revitalise the remaining schemes over a six-year period from 2003 to 2009. The Limpopo Government has committed R252 million to this project.

VeldCare promotes best-grazing systems and erosion-prevention practices to improve production. It develops and maintains agricultural activities in accordance with the principles of ecologically sustainable development within North West. Economic and social development opportunities are realised by improving grazing areas and maintaining viable grazing areas throughout rural communities.

SoilCare encourages rural farmers in KwaZulu-Natal, the Eastern Cape and Mpumalanga to build innovative structures to combat soil erosion. This includes reducing the depletion of soil fertility and acidity. Through SoilCare, sustainable agricultural production systems, such as diversification, management of input and conservation tillage are introduced.

The Eco-Agriculture Extended Landcare Programme was introduced in 2004/05 to complement the Expanded Public Works Programme. The Department of Agriculture is contributing R42,9 million to job creation and training.

The objectives of JuniorCare are to empower previously disadvantaged youth through training in facilitation and leadership skills.

This includes the promotion of food security at home and at schools, awareness of sustainable

agriculture, and stimulating the formation of youth clubs and projects that aim to promote other components of LandCare. JuniorCare addresses the needs of young people in an integrated way and involves interdisciplinary approaches.

Land and Agricultural Development Bank of South Africa (Land Bank)

The Land Bank is a specialist agricultural bank guided by a government mandate to provide financial services to the commercial farming sector and to agribusiness. It also makes available new, appropriately designed financial products that facilitate access to finance by new entrants to agriculture.

A board of directors that reports to the Minister of Agriculture and Land Affairs governs the Bank.

The Bank's mission is to:

- develop and provide appropriate products for commercial and development clients
- leverage private-sector investment in the agricultural sector
- develop techniques for financing high-risk agriculture and new business areas
- support programmes of the Ministry of Agriculture and Land Affairs by aligning the Bank's products with these programmes
- contribute to rural development by linking up with government structures and activities.

These programmes and structures include Land Redistribution for Agricultural Development (LRAD), the Agricultural Sector Plan and the ISRDP.

The Land Bank offers various strategies to support historically disadvantaged individuals (HDIs), including easy access to loans, equity finance, loans for land-reform beneficiaries, a special loan for HDIs buying farms for the first time (Special Mortgage Bond), incentives (a lower interest rate for farmers who show their commitment), micro-loans for people starting an enterprise or a small farming business, and 'We Come to You' – making banking more accessible through its branches nationally, its rural satellite offices, and partner organisations such as development, finance and government institutions.

Black Economic Empowerment (BEE)

BEE is seen as the driving force towards stimulating growth and wealth.

The main challenge facing the sector is to harmonise its strategic plan with the Government's BEE Strategy, codes and norms. On 26 July 2004, the Ministry of Agriculture and Land Affairs launched AgriBEE, a broad-based BEE framework for agriculture.

The framework is a key component of implementing equitable access and participation in accordance with the Agricultural Sector Plan. The document has been launched for public discussion and a further consolidation process aimed at reaching a common position before the end of 2004.

Agricultural Credit Scheme (ACS)

The Department has established the ACS with an initial budget of R1 million.

The aim of the ACS is to contribute to a competitive, efficient and sustainable agricultural financial system that will provide access to agricultural credit and related financial services.

Agri SA

Agri SA is a federation of agricultural organisations

comprising nine provincial unions, 28 national commodity organisations, and the agricultural business chamber as members.

It celebrated its centenary in 2004.

The mission and vision of Agri SA is to promote the economic opportunities and social well-being of commercial and commercially oriented farmers, by positively influencing agricultural policy and rendering supportive services.

It monitors policy developments and influences policy decisions in areas such as soil conservation and environmental affairs; land reform; aspects affecting small-scale farmers; water resources; labour legislation; safety, law and order; rural local government; monetary and fiscal policy; financing; trade policy and agreements; industrial policy; agricultural research, marketing, economics and financial and statistical information; input costs; liquid fuel; transport; disease; pest control; and food security.

Agri SA is involved in various products which include, among others:

- a R6-million project to teach farmers labour law, which reached 24 861 participants over six years
- a farmer-development desk established in 2003 to gather information regarding Black farmer-development projects supported by organised agriculture
- the Agri Securitas Trust.

Agricultural Business Chamber (ABC)

The ABC is a sectoral body representing an important component of South Africa's business sector. The ABC's members represent total assets of almost R30 billion and an annual agricultural business turnover of about R50 billion.

ABC members operate more than 2 000 service centres countrywide with more than 100 000 employees. In many rural areas, members of the ABC are the business hub of the community and make a key contribution towards maintaining rural infrastructure.

The ABC is an integral part of the Agri SA Group, and associates with Business South Africa and international bodies such as the International



In May 2004, the South African Government donated R100 million to United Nations (UN) agencies to help with poverty-alleviation projects in the rest of the southern African region.

This was in response to a worldwide appeal by the World Food Programme in July 2003.

Lesotho, Swaziland, Mozambique, Zimbabwe, Malawi and Zambia benefited from the donation.

The bulk of the donation, R67,5 million, was to be used by the Food and Agricultural Organisation of the UN for agricultural interventions and household food security.

Much of the South African donation was expected to find its way back into the local economy, with the UN buying huge quantities of maize from local farmers for use in the region and elsewhere on the continent, because of the competitive pricing.

In 2003, the UN bought 310 000 tons of maize from South Africa.

Federation of Agricultural Producers, the International Chamber of Commerce and the International Agribusiness Management Association.

The Chamber represents agricultural companies, agricultural co-operatives, companies which arose out of the conversion of agricultural co-operatives, and other agricultural business enterprises and organisations.

Agricultural businesses play a significant role in the economy of South Africa as handlers, processors and marketers of agricultural products, and as suppliers of production input and services.

Agribusiness as an economic sector

Agribusiness can be divided into two categories: non-co-operative business ventures and co-operatives or transformed co-operatives.

Non-co-operative business ventures, also known as profit companies, are involved in the production and distribution of agricultural equipment and production requisites, and the marketing of agricultural products.

Co-operatives dominate the distribution of intermediate requisites and the handling, processing and marketing of agricultural products.

Agricultural co-operatives or agribusinesses are regarded as the farmers' own independent business organisations. There are close to 1 000 primary agricultural co-operatives and agribusinesses throughout the country. They supply their members with production input such as seed, fertiliser, fuel and repair services. They also provide credit and extension services, and handle a large percentage of their members' produce.

There are more than 15 central co-operatives in the country, which aim to supply the primary co-operatives with specific services such as processing and marketing of agricultural products, insurance services for crops, short-term cover, and farming requisites.

The structure of agribusiness has changed substantially since the deregulation of the agricultural sector into a free-market economy in 1994. Many co-operatives transformed into private companies, consolidations and mergers occurred, international

groups entered South Africa, and agribusinesses listed on the JSE.

Agribusinesses are involved in the production and distribution of agricultural equipment and production requisites, and in the marketing and processing of agricultural products.

The co-operative movement in South African agriculture is expected to grow. A new Co-operative Bill is under consideration and it is envisaged that this enabling legislation will make co-operatives accessible to all communities through out-grower projects, contracting and share-equity schemes.

The Co-operative Development Initiative is one of many efforts to facilitate such linkages, and support a 'growth-with-equity' development path for South African agriculture.

National African Farmers' Union

NAFU strives to promote the interests of the disadvantaged farming sector by lobbying for access to support services and empowering its members through effective communication and capacity-building programmes.

The Department of Agriculture funds NAFU's capacity-building programme. Further funding is provided by the US Department of Agriculture.

Bergville Maize Milling Co-operative is also co-ordinated and funded by the national Department of Agriculture.

The Zijamele Farmers Co-operative training programme is co-ordinated by the Department and rendered by Africare as an implementing agent.

The Department also co-ordinates the Presidential Mechanisation Lead Projects.

Institutional capacity-building

The Department of Agriculture has developed a databank for South Africa's agricultural human resource capacity.

In collaboration with the Economic Development Institute of the World Bank, the Department has designed and developed training courses for rural restructuring and development. The Youth Entrepreneurship Programme was launched in 1999.

The Department co-ordinates and funds the National Emerging Red Meat Producers' Organisation. This includes the formation of provincial structures and the provision of organisational leadership training.

Training and research

South African agriculture has a strong research component. Many of the people involved are world leaders in their respective fields. The ARC, an autonomous statutory body set up in terms of the Agricultural Research Act, 1990 (Act 86 of 1990), is the largest agricultural research organisation in Africa.

The ARC provides research support to the Department of Agriculture and the nine provincial departments of Agriculture. ARC scientific expertise supports most of the Department of Agriculture's regulatory directorates, such as the Directorate: Public Veterinary Health, the Directorate: Animal Health, the Directorate: Plant Health and Quality, the Directorate: Agricultural Resource Conservation and the Directorate: Agricultural Production Input. The ARC also supports other agricultural institutions such as the Registrar of Livestock Improvement and Identification, the Registrar of Brands, the South African Veterinary Council and the Perishable Products Export Control Board.

The ARC serves the whole continuum of farmers, from the small-scale subsistence sector, and the emergent commercial sector, to fully fledged commercial farmers. Research is scale-neutral or directed to the specific needs of small-scale or commercial farmers.

South Africa has a number of specialised agricultural high schools and regular schools offering a comprehensive range of agricultural subjects. Prospective farmers are trained at 11 agricultural colleges: Elsenburg (Western Cape), Cedara and Owen Sitole (KwaZulu-Natal), Grootfontein Agricultural College at the Grootfontein Agricultural Development Institute (run by the Department of Agriculture), Glen (Free State), Potchefstroom (North West), Lowveld (Mpumalanga), Fort Cox and Tsolo (Eastern Cape), and Tompi Seleka and Madzi-

vhandila (Limpopo). Diploma courses are also offered at various universities of technology. Degree courses are offered by the faculties of agriculture at various universities.

Veterinary surgeons are trained at the University of Pretoria's Faculty of Veterinary Sciences at Onderstepoort. The former Faculty of Veterinary Sciences at the Medical University of South Africa has amalgamated with the University of Pretoria. State veterinarians are assisted countrywide by qualified animal health technicians.

Qualified meat inspectors in the provincial Directorate: Veterinary Services assist State veterinarians with meat inspections at abattoirs in South Africa.

In partnership with the University of Pretoria, the Umsobomvu Youth Fund and 40 Agricultural Business Enterprises, about 45 young agricultural graduates were placed in internship programmes with the aim of getting work experience linked to the advancement of their careers.

To address the critical challenge of an ageing scientist base, the ARC has developed the Professional Development Programme targeting especially young women and Black people. By June 2004, some 104 young people were enrolled in the Programme. The ARC is aiming at enrolling 150 young scientists.

Trade relations

The Directorate: International Relations facilitates and co-ordinates international activities on both multilateral and bilateral bases.

The Directorate: International Trade Relations analyses international trade and related policies, advises on multilateral and bilateral agricultural trade policy, and promotes trade initiatives. The Department is responsible for dealing with matters concerning agricultural relations with other countries and organisations, such as the Southern African Customs Union (SACU), the trade and industry sectors of the SADC, the WTO and the International Grains Convention.

The Department maintains bilateral trade agreements with countries in Africa, and is involved in

negotiations as part of SACU with the USA, South American Common Market (MERCOSUR), and the European Free Trade Association. It is also involved in the WTO negotiations individually, and as a member of the Cairns group, the G-20 and the Africa Group.

Work relating to agricultural relations in the field of trade is done in co-operation with the departments of Trade and Industry and of Foreign Affairs. The Department of Agriculture is a member of the FAO; the Consultative Group on International Agricultural Research; the Food, Agriculture and Natural Resources Sector of the SADC; the International Seed-Testing Association; the Organisation for Economic Co-operation and Development's Seed Schemes; the Union for the Protection of New Varieties of Plants; and the Cairns Group.

The Directorate: International Trade Relations is responsible for implementing South Africa's commitments in terms of the WTO Marrakech Agreement. These commitments include the reduction of tariffs, export subsidies, and domestic support given to agriculture. All of the commitments have been met.

In addition, the Department is creating market-access opportunities by implementing the minimum market-access commitments contained in the Agreement.

WTO agricultural negotiations embarked upon after the Doha Development Agenda in November 2001, were still continuing by June 2004.

South Africa's objectives in the agricultural negotiations, as part of the Doha Development Agenda, are to achieve a substantial reduction in domestic support and export subsidies, mainly from developed countries. Other objectives are to achieve a substantial improvement of market access for South African agricultural exports; and to ensure that South Africa's commitment, in terms of domestic support, fully covers the development needs of the country.

The Department is developing trade relations with other countries. This includes the implementation of the agricultural aspects of the SACU Agreement; the SADC Protocol on Trade; and the SA-EU Trade, Development and Co-operation Agreement (TDCA)

A substantive restructuring is aimed at graduating the SADC into a regional trading bloc. Key features of this restructuring include the grouping of the 21 sectors into clusters under four directorates at the SADC Secretariat, and the establishment of SADC national committees to co-ordinate their respective individual member-state interests relating to the SADC.

The SA-EU TDCA was implemented on 1 January 2000. The Department has introduced a system whereby market opportunities under the Agreement can be fully utilised. This includes providing information to potential exporters, as well as the administration of export quotas granted to South Africa under the Agreement. Since 1 January 2000, the Department has been issuing export permits for various products such as wine, canned fruit, fruit juice, cut flowers, proteas, cheese and frozen strawberries to be exported to the EU at reduced levels of duty.

The South African Government has signed a framework agreement with MERCOSUR (a treaty establishing a common market between Argentina, Brazil, Paraguay and Uruguay). This agreement lays down the framework for negotiations of a free trade agreement (FTA).

The Department is also preparing its position regarding possible FTAs with China, India, Nigeria and Kenya.

The Department is investigating and evaluating export opportunities for agricultural products on world markets. A subdirectorates was formed to deal specifically with issues related to the strategic repositioning of the agricultural export sector. Strategic market research and the formulation of new industry strategies for exports are priorities. Export-led development projects are also being considered as a means to alleviate poverty.

The Directorate: International Trade Relations facilitates the training of role-players in the utilisation of trade tools.

The ARC participates in various co-operative research agreements, international organisations and networks.

The ARC also supports various government departments in deliberations regarding international

agreements and disputes, for example the Convention on Biodiversity, the Kyoto Protocol on Global Change, the Montreal Protocol, GMOs and Indigenous Knowledge Systems.

Import and export control

The aim of the Import Export Policy Unit of the Directorate: Animal Health is to formulate and support policies to reduce sanitary (health) risks in the import and export of animals and animal products.

Import requirements vary according to the product and the animal-health situation in individual countries.

South Africa is an active member of the OIE. Disease reports are received from the OIE and through direct contact with the veterinary administration in the exporting countries.



The third Plenary Meeting of the National Agricultural Research Forum (NARF) was held in January 2004.

At the meeting, a Memorandum of Understanding for co-operation in the areas of research, development and technology transfer in agriculture was adopted.

The NARF was established in 2002 within the context of the Agriculture Sector Strategy adopted by the Presidential Working Group on Agriculture. The NARF's role is to:

- provide for information-sharing on scientific endeavours and advancement, as well as best practice
- promote collaboration, synergies and innovation through partnership arrangements
- act as a consultative forum for constructive dialogue on national, regional and international research collaboration.

Priorities for the NARF in 2004 included:

- exploiting the role of science and technology (S&T) in improving the competitiveness of agriculture through biotechnology, human and animal nutrition, intellectual property rights, and dealing with food security and drought
- formulating risk-management strategies, including drought, animal nutrition and early warning systems
- recognising biotechnology and its role in agricultural production
- human resource development and the brain-drain in agricultural research
- recognising intellectual property rights
- fostering public understanding of S&T.

Trade in animal and animal products is based on a series of requirements considered appropriate by the importing country to prevent the entry of diseases.

The Directorate: Plant Health and Quality of the Department of Agriculture is the designated National Plant Protection Organisation of South Africa and has an obligation to fulfil the requirements of the WTO-SPS and the IPPC.

The Department is one of the key regulatory State departments with the authority to enforce laws enacted by Parliament to protect the South African consumer, the environment and other national interests. The Department's regulatory activities, with regard to plants and plant products, are primarily enforced by the Directorate: Plant Health and Quality and the Directorate: Genetic Resources. In addition, South Africa's Customs Service participates in this effort by detaining imported goods when requirements are not met.

The Directorate: Plant Health and Quality promotes and regulates the availability of healthy and productive plant material and the quality of agricultural products in South Africa. Import control is vital to prevent the introduction of potentially harmful foreign pests. Prospective importers of plants and plant products have to apply for an import permit for those controlled goods not published in the *Government Gazette R1013* of 1989.

A pest-risk analysis, based on scientific data, is conducted, and specific phytosanitary requirements are set out according to the phytosanitary risk(s) involved. These conditions are then stipulated in the permit issued to the importer. Importers are obliged to present the material to the executive officer of the Act or the official representative, for inspection. Should any potentially harmful pest be introduced into and become established in South Africa, the Directorate: Plant Health and Quality will conduct a survey to determine the distribution of the organism, draft an eradication programme, liaising with other relevant parties, and possibly co-ordinate and participate in the eradication programme.

Despite strict precautions in the past, several harmful alien organisms have become established in specific production areas in South Africa, causing substantial losses to agriculture. Control measures

are published to prevent or combat the spread of these organisms to other areas in the country. Quarantine services ensure imported plant material and biological control agents are appropriately handled, to guarantee that harmful alien organisms do not enter and become established in the country.

In export control, South Africa has to comply with the import conditions of the specific country or group of countries it is exporting to, by issuing phytosanitary certificates. The Directorate furthermore maintains a database of the import conditions and procedures of various countries, and the occurrence of harmful organisms within South Africa. It renders advisory and identification services, carries out field inspections, and conducts laboratory tests as requested by the importing country.

All consignments of plants and plant products intended for export are inspected, evaluated and certified by the Directorate.

Food safety and quality assurance

Food safety has become an international public health issue which is considered a top priority by the WHO.

Over the years, emphasis in the Department has been mainly on setting norms and standards for the quality aspects of agricultural products. As a result of this shift in emphasis internationally, and the negative impact that a lack of consumer confidence in the safety of food products can have on trade, the Directorate: Food Safety and Quality Assurance was created in 2002.

The aim of the Directorate is to develop policy and set norms and standards for agricultural food products of plant and animal origin, as well as to regulate agricultural production input such as fertilisers, farm feeds, pesticides and stock remedies.

The EU is reviewing a number of agrochemicals used on agricultural products destined for their market. As South Africa exports between 60% and 70% of its total exports to the EU, the review of the use of these chemicals has the potential to impact negatively on South African products.

As a result of its diverse agroclimate, South Africa cannot remain competitive without the use of cer-

tain chemicals. To address this matter, the Department, the agricultural industry and the EU have embarked on the South African Pesticide Initiative Programme (SAPIP).

The objective of the SAPIP is to assist the local industry to adopt good agricultural practices, and find alternatives or do away with the affected agrochemicals. A financing agreement between the EU and South Africa was signed to facilitate the Programme.

To ensure the safety of exported products, the Directorate has also drafted food-safety regulations with regard to products of plant origin.

Before the registration of agricultural products, an appropriate risk and value assessment is conducted. The value assessment considers whether using the product has merit and whether the application rates will be effective.

The risk assessment considers the inherent toxicity, persistence and bio-accumulative nature of the product, and addresses key issues such as the degree to which humans and the environment may be exposed, and the possible health hazards associated with the product.

Fertilisers, farm feeds, agricultural and stock remedies will be registered if the data requirements of efficacy, safety and quality have been adequately addressed, and the human and environmental risks associated with its proposed use are acceptable. The household remedies, swimming pool remedies and pest control operators are also regulated in terms of the Fertilisers, Farm Feeds, Agricultural Remedies and Stock Remedies Act, 1947.

The inspection service ensures compliance with the regulations. Complaints about a specific product registered in terms of the Act are investigated by the inspection services and administrative and/or legal action can be taken against offenders when necessary.

In terms of the Meat Safety Act, 2000, (Act 40 of 2000), no person may sell or provide meat for human or animal consumption unless the animal from which the meat is sourced has been slaughtered at a registered abattoir. The Directorate is responsible for inspecting and auditing export abattoirs.

The Pathogen Reduction Programme is due for implementation in high capacity red-meat abattoirs.

It is envisaged that a national residue-monitoring programme will be introduced in the next three years to ensure that all South African consumers enjoy the same level of protection as the consumers of the export markets.

Land Affairs

The Department's key focus is to provide access to land and extend land rights, with particular emphasis on historically disadvantaged communities, within a well-planned environment.

The Department is responsible for:

- deeds registration
- cadastral surveys
- surveys and mapping
- spatial planning and information
- land reform, implementation management and co-ordination
- land-reform systems and support services.

Deeds registration

The aim of the Chief Directorate: Deeds Registration is to maintain a public register of land, as well as an efficient system of registration aimed at affording security of title to land and rights to land.

During 2003/04, the Chief Directorate played a very important role in supporting the Department's land-reform initiatives. Land-registration information supplied from the Deeds Registration System database plays a vital role during the preliminary investigative stages of any land delivery initiative, while the final step in the process, the registration of the relevant title deeds, is handled by the nine Deeds Registries.

These are situated in Pretoria, Cape Town, Johannesburg, Pietermaritzburg, Bloemfontein, Kimberley, King William's Town, Vryburg and Umtata. Despite an increase in their workload over the past year, the Deeds Registries have been able to maintain a turnaround time of their vital registration function of 10 working days from lodgement.

The Chief Directorate has taken an active part in the drafting of the Communal Land Rights Act, 2004

(Act 11 of 2004). Deeds officials were able to provide expert assistance with the formulation of the registration-related procedures, which form part of the Act.

The Act provides for legal security of tenure by transferring communal land, including KwaZulu-Natal Ingomnyama land, to communities, or by awarding comparable redress.

It also provides for the:

- conduct of a land-rights inquiry to determine the transition from old order rights to new order rights
- democratic administration of communal land by communities
- co-operative performance of municipal functions on communal land
- creation of Land Rights Boards.

Deeds Registries are responsible for the:

- registration of real rights in land
- maintenance of a public-land register
- provision of land-registration information
- maintenance of an archive of registration records.

Deeds and documents lodged with Deeds Registries are examined by deeds controllers for accuracy regarding the content, as well as for compliance with common, case and statutory law, and attachments against the property.

Holders of a title deed registered in the Deeds Registries are therefore assured of the security of their title to the property.

Deeds Registries employ data typists to update and maintain registration data on the Deeds Registration System (DRS) database daily. This database is mainframe-based and hosted by the State Information Technology Agency. The mainstay of the Chief Directorate's electronic systems is the DRS software.

The Chief Directorate: Deeds Registration has developed a bar-code-based document-tracking system (DOTS) for implementation in Deeds Registries. DOTS was born out of the need to eliminate the disappearance of deeds and documents during the registration process. DOTS' ability to track deeds and documents through the various processes within the Deeds Registry has repeatedly

proved its worth. In addition, the system provides Deeds Registries with valuable statistical information which is being used for managerial purposes.

Deeds Offices supply registration information in support of all units in the Department of Land Affairs conducting research for land-reform purposes.

The Department has launched an initiative aimed at establishing at least one Deeds Registry per province. The first of the new Deeds Registries will be established in Nelspruit, Mpumalanga. This is to be followed by the expansion of the areas of jurisdiction of the Eastern Cape Deeds Registries at Umtata and King William's Town.

The e-Cadastre, which forms part of the Department's Master Information Systems Plan, is a system proposed for the electronic submission and processing of diagrams in the offices of the Surveyors-General, and deeds and documents in the Deeds Registries.

By eliminating paper traffic between the legal fraternity, Deeds Registries and offices of the Surveyor-General, the system will reduce survey approval and deeds registration turnaround times and also enable easier access to survey and registration services from remote areas. Consequently, the e-Cadastre will benefit previously disadvantaged sectors of the community living in rural areas, informal settlements or low-cost housing schemes.

Cadastral surveys

The Chief Directorate: Cadastral Surveys aims to provide quality services that ensure the integrity of surveyed real rights, and to supply, maintain and provide access to spatially related information.

The Directorate: Cadastral Spatial Information and Professional Support is responsible for, among other things, preparing and updating cadastral maps in both paper and digital form, and examining and approving diagrams and general plans prior to them being registered by the Deeds Registry.

The website of the Chief Surveyor-General contains information and links to a number of other related sites.

Service delivery has improved and good turnaround times have been maintained in the offices of the Surveyor-General.

Processing periods of less than 15 working days in the examination of cadastral documentation are being maintained.

The turnaround times were made possible by the continued improvement of procedures, the restructuring of offices, and the enhanced Cadastral Information System, which is operational in the Office of the Surveyor-General. Ease of access to accurate spatial data has been provided through the enhanced usability and continual updating of the spatial database. Clients have ready access to such data, both in electronic and hard-copy format.

A decision to supply the three spheres of government with free digital data (diagram and general plan images) has been accepted with great enthusiasm.

Two Client Service Centres have been established at the Pretoria and Cape Town Surveyor-General Offices.

The Centres serve 100 to 150 clients a day and supply a legal registration help-desk function to attorneys, land surveyors and other professionals in the property industry.

Services provided to government include the preparation of documentation relating to the awarding of tenders to private land-survey firms, for the survey of State land. Assistance is given to the Land and Tenure Reform Branch and Land Claims Commissions (regional and provincial) in the form of surveys, the provision of cadastral information, the undertaking of field inspections, the undertaking of investigations to determine magisterial boundaries, and the upgrading of data on the former Transkei, Bophuthatswana, Venda and Ciskei states. A tendering process is administered by the Surveyor-General Offices for the appointment of land surveyors on request from either unit.

The formal and informal cadastral spatial data has proved invaluable in providing assistance to components dealing with land reform and restitution.

Surveys and mapping

The aim of the Chief Directorate: Surveys and Mapping is to provide high-quality spatial information through national mapping, national geodetic surveys, national control-survey systems, aerial

photography and other imagery in support of national infrastructure and sustainable development.

It provides surveying, cartographic, client and professional services in support of land reform and sustainable development.

In 2003/04, there was a marked increase in the Chief Directorate's output, and in the distribution of its products as a response to an ever-growing demand from users for updated maps and other spatial information. The quality of its products is known to be world-class.

National mapping

Mapping is a crucial resource for decision-making and development, and one of the most important deliverables of the Chief Directorate to support orderly development planning and sustainable land use.

All the maps of the national mapping series are continuously revised to reflect the change in landscape and other geospatial features. More than 2 000 maps were produced in 2003/04.

The Chief Directorate is a full member of the National Air Space Committee and produces aeronautical charts for the southern African region that are vital to the interests of air safety.

The Chief Directorate provides up-to-date charts that reflect changes to airspace with respect to the Future Airspace Management Efficiency Programme. During 2003/04, eight aeronautical charts were produced on request.

Topographical information system

The maintenance and continuous updating of the Digital Topographic Information System is a key activity of the Chief Directorate. This System contains major features such as roads, railways, built-up areas, contours and rivers of the entire 1:50 000 national map series in digital format. A digital eleva-

tion model is available in horizontal intervals of 400 m and 200 m in mountainous areas, and 50 m for the major metropolitan and development areas.

National Control Survey System

The establishment of the National Control Survey System will facilitate the advance towards a uniform geodetic network for the continent.

This network plays a leading role in the African Reference Framework project aimed at harmonising and linking spatial reference systems across Africa, in support of NEPAD. The National Control Survey System consists of a network of about 62 000 control points distributed throughout the country. The network is made up of about 28 000 trigonometric beacons, 24 000 town survey marks and 10 000 elevation benchmarks.

National aerial photography and imagery

This archive of aerial photography, dating back to 1934, is enhanced annually with the acquisition of new photography.

In 2003/04, new coverage of about 20% of the country was attained. Aerial-photography programmes and priorities are determined in co-operation with local, provincial and national government departments, and are focused on the nodal areas defined by the ISRD and the Urban Renewal Programme.

The archive is used for mapping, land-resource planning, infrastructure development, and legal and land restitution matters.

Spatial planning and information

The Chief Directorate: Spatial Planning and Information consists of three directorates:

- the National Spatial Information Framework is responsible for providing parameters for a coherent spatial data infrastructure, characterised by the availability of relevant, reliable spatial information for planning, delivering services, and the optimal allocation of resources
- the Spatial Planning Facilitation is responsible for establishing, implementing and monitoring a



The Chief Directorate: Surveys and Mapping's map awareness and map literacy campaign adds to the general drive to promote map literacy. MapAware workshops, offered to both public and private organisations, strive to develop and enhance the map skills of people who use spatial information in the workplace.

national spatial planning and land-use management system

- the Spatial Development Framework is responsible for developing policies and guidelines to support the formulation and implementation of spatial- development frameworks at national, provincial and local level, and to provide technical support for all related processes.

The Spatial Data Infrastructure Act, 2003 (Act 54 of 2003), came into effect on 28 January 2004. The Act aims to establish the South African Spatial Data Infrastructure, the Committee for Spatial Information, and an electronic metadata catalogue.

It also provides for the determination of standards and prescriptions with regard to the sharing of spatial information, the capturing and publishing of metadata, and the avoidance of duplication.

The Land-Use Management Bill proposes a set of directive principles to guide land-use management practices in the country. It aims to establish standards and tools for effective decision-making in land-development processes.

The Spatial Information Bill provides for greater access to spatial information, standards to enhance interoperability, and the institutional framework to govern and regulate the sector.

To improve and facilitate access to spatial information, the Spatial Data Discovery Facility (SDDF) has been maintained and expanded to link 22 nodes. It also contains information concerning approximately 3 259 spatial data sets.

The Council for Scientific and Industrial Research's Environmentek and the Demarcation Board are creating nodes and will populate them with more records. The Spatial Information Bill, when enacted, will encourage more data custodians to capture metadata, thus creating the critical mass necessary for the SDDF to become the one-stop portal for geospatial metadata.

The National Spatial Information Framework, in conjunction with the South African Bureau of Standards (SABS), is developing four standards. These include the Minimum Data Content of the Framework Data and the Unique Feature Identification Standard. A test bed will be developed to establish guidelines for the implementation of the

Unique Feature Identification Standard. The Land Cover Classification Standard has been completed and submitted to the SABS for comment.

Land-reform implementation, management and co-ordination

The Chief Directorate: Land-Reform Implementation Management and Co-ordination is located in the Branch: Land and Tenure Reform.

The Chief Directorate's aim is the actual delivery of land and tenure reform. This is primarily done through nine Provincial Land Reform Offices (PLROs) and 36 operational regions.

The main objective of the Land Reform for Agricultural Development (LRAD) Programme, in line with the Department's mission, is to provide access to land, and to extend land rights to previously disadvantaged communities.

On 18 February 2004, the Minister of Finance, Mr Trevor Manuel, announced that a new grant of R750 million would be transferred to provincial Agricultural departments in 2004/05.

The money will be used to provide comprehensive agricultural support to developing farmers, including those benefiting from the LRAD Programme.

Between 2001 and March 2004, the LRAD Programme delivered 124 562 31 ha to 7 622 beneficiaries. This translated into 377 farms that were distributed to Black farmers to commence agricultural activities. Notable progress was made to expedite labour tenant cases in Mpumalanga and



On 18 August 2004, the Minister of Agriculture and Land Affairs, Ms Thoko Didiza, launched the Comprehensive Agriculture Support Programme (CASP) in Boston, KwaZulu-Natal.

The CASP focuses on infrastructure, information and knowledge management, financial assistance, technical and advisory services, training and capacity-building, and marketing and business development.

The multiphase CASP specifically targets emerging women farmers in rural areas.

The Department committed R210 million in 2004/05 for the initial roll-out of the CASP.

KwaZulu-Natal, where the majority of labour tenants were located.

By June 2004, about 772 626 ha of land had been delivered under the State Land Disposal Programme. Between June 2003 and March 2004, the Department settled 1 655 Black farmers through LRAD. By June 2004, the cumulative figure of LRAD beneficiaries since 2001 was 19 736.

Land-reform systems and support services

The objectives of the Land and Tenure Reform Programme are:

- increased sustainable land-use
- better access to land-administration services
- reaching land-redistribution targets
- a decrease in State-owned land
- increased State-land vesting
- increased security of land tenure.

The Communal Land Rights Act, 2004 aims not only to ensure ownership of assets by families in rural areas, but also to encourage small-scale and co-operative agricultural production, thereby improving food security.

It also aims to give secure land-tenure rights to communities and persons who occupy and use communal land. Most of this land is registered in the name of the State, and is held in trust by the Minister of Agriculture and Land Affairs or the Ingonyama Trust, for communities.

The confirmation of vesting of State land through the issuing of certificates in terms of the Constitution, plays an integral role in freeing State land for land-reform purposes. This process confirms ownership thereof in either national or provincial government.

A total number of 16 996 land parcels covering 3 951 404 ha had been vested by 31 March 2004, comprising 15,7% of the total number of surveyed land parcels (108 222) to be vested.

Between 1994 and mid-2004, about 537 000 ha of land controlled by the Department of Land Affairs was disposed of. About 236 600 ha of agricultural land was made available to emergent farmers by the provincial departments through transfers and option to purchase.

About 50 000 ha of Fala land (under the Department of Public Works) has been made available to new farmers. Some 592 000 ha of agricultural State land under the Department's control was assigned to the provincial members of executive committees under the 'Agricultural Power of Attorney' to decentralise the administration and disposal thereof. From the 592 000 ha, some 192 000 ha were leased and 44 000 ha were disposed of during 2004/05.

The Chief Directorate: Land-Reform Systems and Support Services has proactively engaged with the private sector to increase their involvement in land reform so as to improve the scale of delivery. Positive engagements were initiated with the Banking Council. An existing service level agreement with the Land Reform Empowerment Facility (LREF) has been maintained.

The LREF is a wholesale credit facility hosted and administered by Khula Enterprise Finance, which was created by the Department to assist in the establishment of commercially viable land-reform projects.

The LREF approved seven land-reform projects during 2003/04.

Commission on the Restitution of Land Rights (CRLR)

In 1995, the CRLR was established in terms of the Restitution Act, 1994 (Act 22 of 1994), which aims to:

- provide equitable redress and restoration to victims of dispossession, particularly the landless and the poor
- contribute towards the equitable redistribution of land in South Africa
- promote reconciliation through the restitution process
- facilitate development initiatives by bringing together all relevant stakeholders, especially provincial governments and municipalities.

The Restitution of Land Rights Amendment Bill was signed by President Thabo Mbeki on 28 January 2004 and promulgated on 4 February 2004 in the *Government Gazette*. The purpose of the Act is to empower the Minister of Agriculture and Land Affairs to acquire, including by expropriation, land

for restitution purposes or for any other related land-reform purpose without a court order.

By March 2004, 48 825 claims had been settled, representing a 34% increase in the number of settled claims in 2003 (36 488). Of the 48 825 claims settled, 6 113 are rural and 42 712 urban.

Some 810 292 ha of land has been approved for restoration and R1 256 227 321 has been committed for this purpose.

The Commission has established a post-settlement support programme which pays special attention to development planning and facilitation. The thrust of this programme is to identify critical stakeholders for each claim, and to obtain their participation and commitment to supporting beneficiaries.

This support includes conducting feasibility studies, land-use planning, business planning, project management, business development, capacity-

building, settlement planning, financing, monitoring and control. There have been a number of claims for forestry, protected areas and land with mining rights.

In pursuit of more equitable land-ownership patterns, government allocated an additional R700 million to Land Reform and Restitution programmes in the 2004/05 financial year.

Land tenure is intended to promote, support and co-ordinate land rights of labour tenants and farm workers.

Restitution has contributed directly to poverty alleviation. Over the past 10 years, some R1,6 billion has been spent on financial compensation. Restitution beneficiaries have spent this money on home improvements, education and other livelihoods projects. These funds have boosted local economies and improved the socio-economic status of beneficiaries, thus restoring their dignity.

Acknowledgements

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