

Agriculture & Agro-processing Master Plan

Status Update by Prof Mzu Qobo

August 2021



agriculture, land reform
& rural development

Department:
Agriculture, Land Reform and Rural Development
REPUBLIC OF SOUTH AFRICA



Presentation Outline

- ❖ Background on Master Plans and Priority Economic Sectors
- ❖ AAMP Coordinating and Executive Oversight Structures
- ❖ AAMP Consultation Process – *National and Provincial Social Partners*
- ❖ AAMP Outputs
 - ❖ Framework Agreement “**What Is Needed**” – *Vision, Objectives and Approach based on Value Chain Analysis*
 - ❖ Action Plan “**How To Do and Where**” – *Sectoral and Value Chain Interventions and Commodity Corridors.*
 - ❖ Targeted Commitments “**Who Should Do What, Where & When**” – *Social partners’ commitments based on Action Plan and Framework Agreement*
- ❖ Current Phase – *Negotiations on Social Partners’ Targeted Commitments*
- ❖ Projected timelines for AAMP sign-off

Completed by June 2021

Contained in the Appendix



Purpose of the presentation

❖ The purpose of this presentation is to:

- Provide comprehensive status updated on AAMP development and coordination
- Explain the next steps and timeline to finalize the AAMP plan



AAMP Consultation Process – National and Provincial

- ❖ **May 2020** – AAMP researchers & coordinator of the AAMP appointed
- ❖ **26 June 2020** – Social Partners Meeting, chaired by Minister Didiza, launched the AAMP
- ❖ **Jul 2020 to Mar 2021** – Stakeholder consultations, research & development of the AAMP
- ❖ **29 March 2021** – Social Partners Meeting, chaired by Minister Didiza, endorse AAMP Framework Agreement (*vision, objectives & Value Chain and targeted Commitment approach*)
- ❖ **07 June 2021** – Social Partners Meeting, chaired by Minister Didiza, endorse AAMP Action Plan (*interventions*) and also allowed to commence with Negotiations of Targeted Commitments
- ❖ **26 Jul – 15 Aug** – Provincial commitments to the AAMP finalized
- ❖ **10 Jun – 16 Aug** – Facilitator, Prof Qobo, discussed negotiation structure and chairing of meetings with Social Partners. On 26th July – Minister was briefed on challenges with chairing
- ❖ **17 Aug** – Facilitator, Prof Qobo, finalized negotiation structure and briefed Chairs of their duties and scope of powers
- ❖ **01 to 30 Sep** – Finalize the negotiations on Targeted Commitments by Social Partners

AAMP facilitator:

Prof Mzu Qobo

AAMP Researchers:

NAMC
BFAP
CREED

Co-creation team

Commercial business
Labour
Government
Civil society



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AAMP Coordinating and Executive Oversight Structure

Stakeholder / Social partner Structures



Executive Oversight Committee Chair: Minister Thoko Didiza	
Members: Industry representatives (commercial and emerging), labour and civil society leaders, government leaders (national and local)	
ADMINISTRATIVE SUPPORT NAMC	Reference Group 1: Sectoral Cross-cutting Interventions Chair: DALRRD DG: Mr Ramasodi Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society
	Cluster 1: Natural Resources Co-chairs (equal status): DALRRD and DWS: DGs Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society Topics: Land (Align to ongoing land reform processes) and Water (Water rights, infrastructure and maintenance)
	Cluster 2: Human Capital Co-chairs (equal status): Labour Nomination and DoL DG Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society Topics: Labour (Worker ownership, Bargaining Council, Decent Wages), Producer Support (extension, training through PPP's, State Veterinarian services and comprehensive data and information hub)
	Cluster 3: Commercial Enablers Co-chairs (equal status): Commercial and Emerging Nominations Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society Topics: Finance (Blended finance, Industry levies and trusts); Markets (Local, regional and deep see exports, market access, trade policy); Transformation (Production scheme integration in value chains); Infrastructure (Water, electricity, roads, rail, storage, ports, fresh produce markets) and Technology and Biosecurity (National animal health, traceability, plant health and technology and R&D)
	Reference Group 2: Value Chain Interventions Chair: Industry: Agbiz CEO: Dr Purchase Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society
	Cluster 4: Field Crops Value Chain Co-chairs (equal status): GrainSA & SAGRA Nomination Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society Topics: grains, oilseeds, cotton, barley, sunflower, canola and sugar
	Cluster 5: Horticulture Value Chain Co-chairs (equal status): FruitSA & Emerging Commodity Nomination Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society Topics: fruits, nuts, vegetables & floriculture
Cluster 6: Livestock Value Chain Co-chairs (equal status): RPO & Emerging Commodity Nomination Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society Topics: beef, goat, sheep, wool, poultry, pork, dairy, ostrich	
Cluster 7: Livestock Value Chain Co-chairs (equal status): DTIC DG and CGCSA Nomination Members: 2-government; 4-industry (2-commercial and 2-emerging), 2-labour and 1-civil society Topics: food, beverage and inputs	

AAMP Output III: Targeted Commitments “Who Should Do What, Where and When”. The Scope and duties of Chairs

AAMP Facilitator	Reference Group I & II Chairs	Clusters I to 7 Co-Chairs
Resources, Principles and Processes		
<p>a) Chairs will at all times be supported by the technical and administration services from the NAMC, BFAP and CCRED.</p> <p>b) Chairs should review the record of the meetings and sign-off if they are satisfied that these were a true reflection of the discussions.</p> <p>c) Chairs also need to bracket those areas that require further discussion or resolution.</p> <p>d) Chairs of Reference Groups 1 and 2 should from time to time confer on the progress of the negotiations in various Clusters and exchange information. Some of these meetings will be convened by the Facilitator.</p> <p>e) Negotiations at each cluster should be inclusive and managed in a manner that allows Social Partners to participate effectively and in a constructive manner.</p> <p>f) Negotiations should focus on and be guided by, the key principles, supported by scientifically based evidence and research that has been set out in the broader agreement and the Action Plan and try to reach consensus on targeted commitments</p>		
<ul style="list-style-type: none"> Ensure technical support is available for all clusters and reference groups. Provide support to Reference Groups chairs and draft the negotiation plan and scheduling of meetings. Also ensure all Social Partners receive meeting invites and negotiation packs in reasonable times to prepare for the negotiations. Collect and elevate issues requiring unblocking by the Executive Oversight Committee. Ensure integration of negotiations between Reference Group I and II. Interact with commodity groups to obtain any information required to support the masterplan commitment. 	<p>Support the facilitator of the AAMP in managing the negotiations process across the cluster-streams and ensure these adhere to the agreed-upon agenda and time-lines. This also means guarding against going over the line.</p> <p>Support cluster chairs in brokering agreements or achieving consensus.</p> <p>Elevate difficult issues/deadlocks from each cluster to the facilitator for his attention.</p> <p>Communicate the final outcomes of the reference group to the facilitator for tabling at the Executive Committee.</p> <p>Ensure cluster negotiations are conducted in a fair, transparent and collaborative manner and that acceptable resolutions are reach on</p>	<p>Communicate the final outcomes of the cluster to the overall Chair of the Reference Group.</p> <p>Elevate challenges from each cluster to the overall Chair of the Reference Group.</p> <p>Coordinate and aggregate the commitments and targets from all Social Partners participating in the cluster.</p> <p>Ensure cluster negotiations are conducted in a fair, transparent and collaborative manner and resolutions are reach on a consensus basis.</p> <p>Ensure the negotiations of each cluster are set up in the manner that allows Social Partners to participate effectively and orderly manner.</p>

AAMP Output III: Targeted Commitments “Who Should Do What, Where and When”. Parallel Approach to Reach Consensus

Focus Areas	Meeting Type	Required persons	Date	Expected Outcomes
Brief Minister Didiza of co-chairing structure for AAP negotiations on targeted commitments	Official AAMP	Hon. Didiza, Qobo, Ramasodi and Nggangweni	26 Jul 2021	Minister endorse the co-chairing structure and need to finalize AAMP Output III: Targeted Commitments by Social Partners
Brief Chairs of Reference Groups and inform their scope and powers during AAMP negotiations	Official AAMP	Qobo, Ntombela, Ramasodi Nggangweni and Purchase	17 Aug	Brief on the scope and functions of Chairs and Co-chairs
Technical engagement on Supermarkets and Retails targeted commitments to be presented at AAMP	Preparatory	Qobo, CGCSA (Neo & Matlou) and DALRRD/DTI (APS and Agro-Processing)	20 Aug	Committed target by supermarkets on local procurement, including for emerging farmers and agro-processors Committed target on Supplier Development Programme Commitment on amended APS Act – assignees fees
Technical engagement on Agricultural Financing targeted commitments to be presented at AAMP	Preparatory	Qobo, BASA (Venter) and DALRRD (Mtshiza)	27 Aug	Committed target by Banks and DALRRD on Blended Finance Committed targeted by Banks to finance emerging farmer
Finalization of co-chairs for clusters under Reference Group I and II	Official AAMP	Qobo, Commodity CEOs, Labour, Civil Society, DALRRD, DTIC & Org-Agric CEOs	2 Sept	Endorse all nominated names to co-chair all clusters Brief Co-chairs about their duties and powers during negotiations
Technical engagement on Fibre Industry targeted commitments to be presented at AAMP	Preparatory	Qobo, DALRRD (<i>Animal Health/Prod, ExtSe Finance, Market</i>) and CEOs of WGA, MohairSA, Goats and CottonSA	3 Sept	Commitment on expanding fibre production and transformation Commitment on government support (<i>extension service, land and financing to farmers and fibre value players</i>)
Technical engagement on Fruit and Wine Industry targeted commitments to be presented at AAMP	Preparatory	Qobo, DALRRD (<i>Plant Health/Prod, ExtSe Finance, Market</i>) and CEOs of FruitSA, CGA, Hortgro, Subtrop and VINPRO	6 Sept	Commitment to expand fruit/wine production & transformation Commitment on government support (<i>extension service, land and financing to farmers and fibre value players</i>)
AAMP official negotiation on targeted commitments	Official AAMP	Qobo and all Social Partners	10-30 sept	AAMP targeted commitments endorsed by Social Partners

End – thank you

❖ Request the meeting to:

- Take note and endorse the action plan to finalize AAMP negotiations by end of September 2021



Appendix

- ❖ Background on Master Plans and Priority Economic Sectors
- ❖ AAMP Coordinating and Executive Oversight Structures
- ❖ AAMP Consultation Process – *National and Provincial Social Partners*
- ❖ AAMP Outputs
 - ❖ Framework Agreement “**What Is Needed**” – *Vision, Objectives and Approach based on Value Chain Analysis*
 - ❖ Action Plan “**How To Do and Where**” – *Sectoral and Value Chain Interventions and Commodity Corridors.*



Background on Master Plans and Priority Economic Sectors

1. In February 2019, President Ramaphosa identify 7 strategic and priority sectors, agriculture and agro-processing is one of them. Also announced that these 7 priority sectors will formulate their Master Plans.
2. In March 2020, Minister Didiza appointed the NAMC to coordinate the research, consultation and development of the Agriculture and Agro-processing Master Plan on behalf of Department of Agriculture, Land Reform and Rural Development in consultation with industry, labour and communities.
3. The NAMC works closely with BFAP and CCRED in coordinating and developing the Agriculture and Agro-processing Master Plan (AAMP).
4. The AAMP recognize and aligns to finalized commodity specific Master Plans (e.g. sugar, poultry and cannabis) and well as other sectoral plans (e.g. Textile and Clothing, ICT, Manufacturing est.).

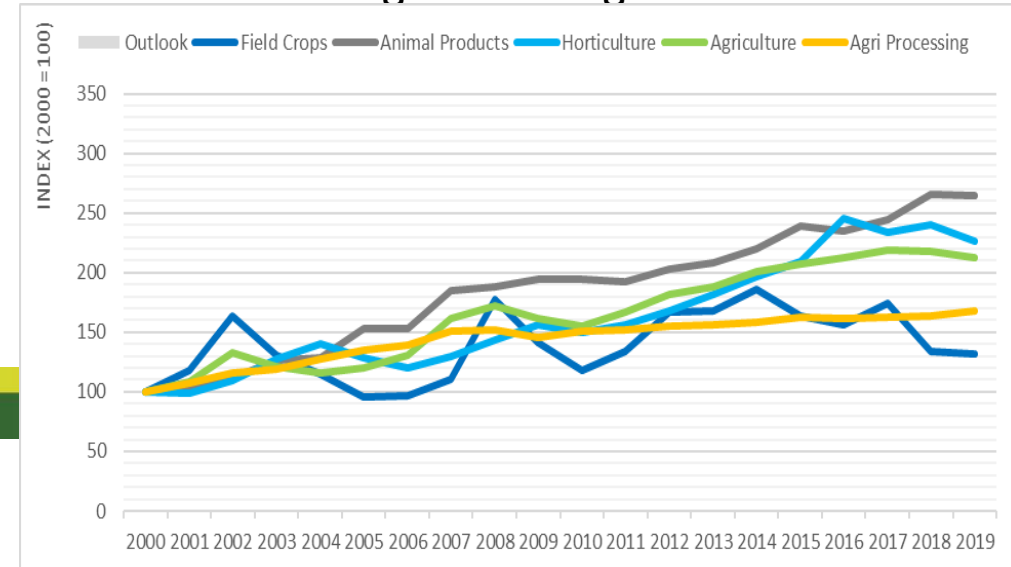


AAMP Output I: Framework Agreement **“What is Needed”**

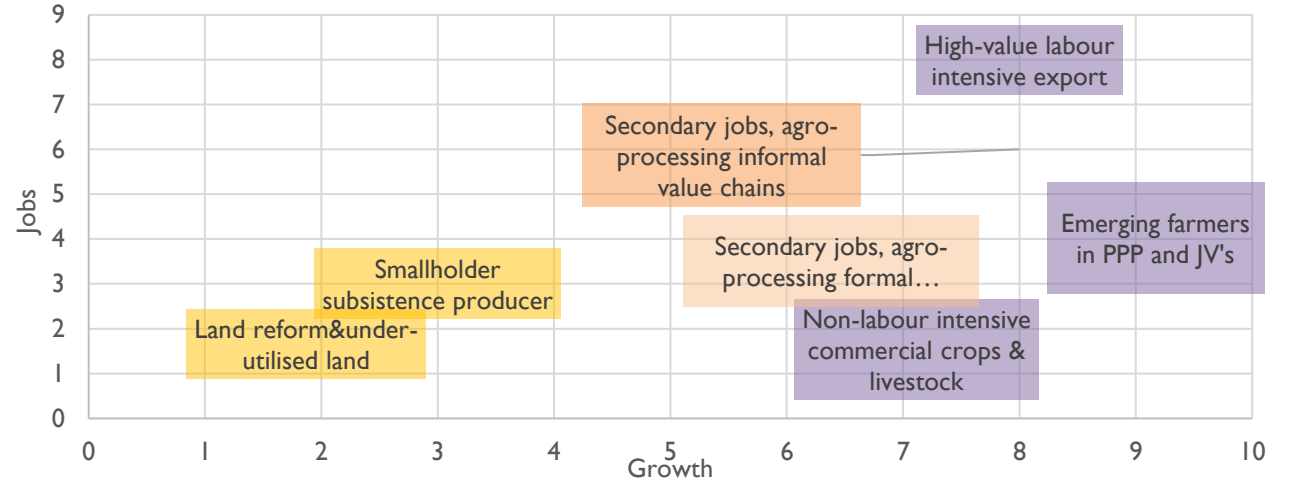
Grow and Develop Agriculture and Food Economy

	Final output, Rand million: Constant 2010-prices	Proportion of final output
All industries	3,589,119	
Agriculture [QSIC 11]	88,895	2%
Food, beverages and tobacco	246,312	7%
Meat, fish, fruit	68,178	
Dairy products	26,086	
Grain mill products	40,779	
Other food products	47,857	
Beverages and tobacco	63,412	
Retail trade	202,535	6%

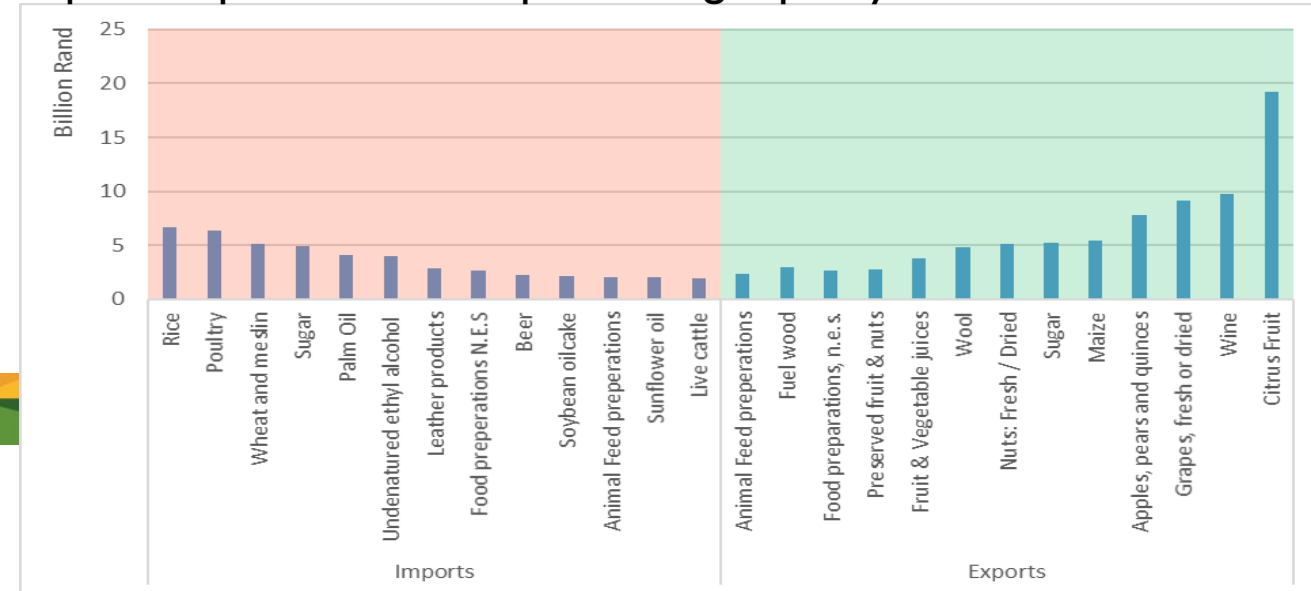
Promote inclusive growth in agriculture and food



Create new and maintain existing jobs and decent working conditions



Expand exports and local processing capacity

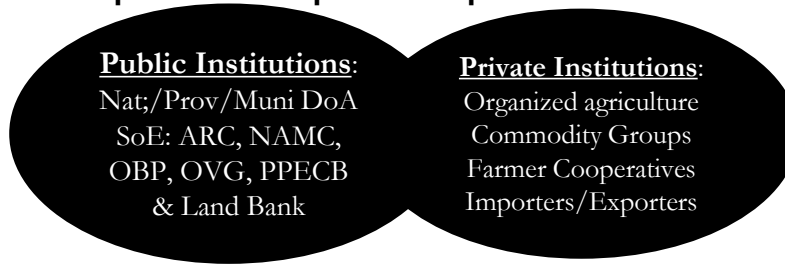


AAMP Output I: Framework Agreement “What is Needed”

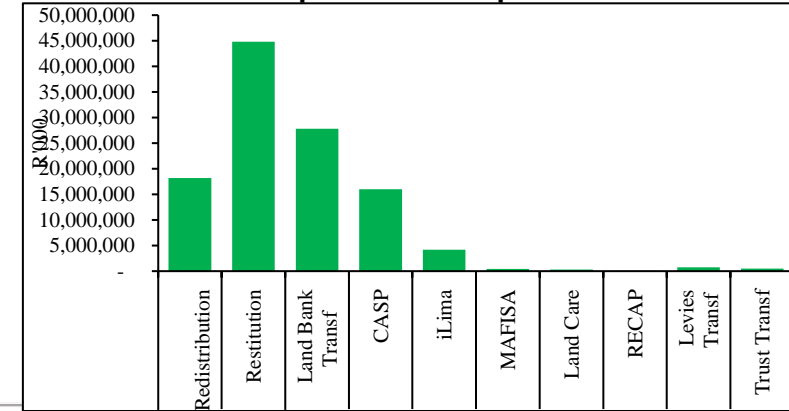
Address the duality problem in the sector

Commodities	Average: 2019-2015		
	Employment	Production Value R'000	Black Farmer Share in Output
Maize	29,289	27,038,097	4.7%
Soybean	7,654	5,698,270	3.1%
Wheat	2,912	5,805,830	1.3%
Cotton	3,876	1,967,187	2.4%
Citrus	128,219	15,046,134	12%
Deciduous	79,443	15,660,627	10%
Viticulture	163,441	7,057,260	1.6%
Potato	42,158	6,972,320	1.0%
Tomato	9,764	2,364,149	8.6%
Wool	23,976	3,397,506	11.0%
Mohair	6,765	554,582	12.8%
Cattle	89,752	31,992,265	34.0%
Poultry	52,836	47,863,345	4.2%

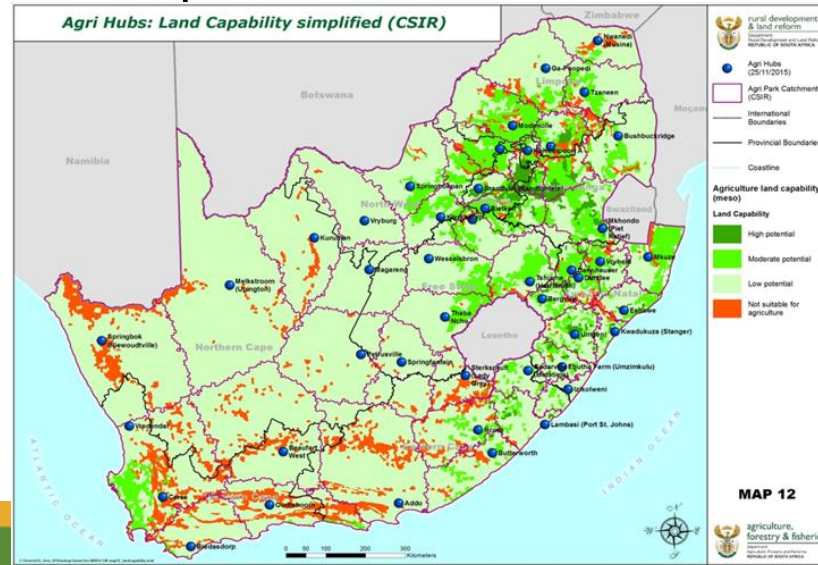
Improve efficiencies in public institutions and partnerships with private sector



Enhance coordination of Funding Tool between public and private sector



Unlock potential of idle land in SA



- ❖ Enhance farmer training and coaching
- ❖ Create enabling infrastructure and logistics
- ❖ Develop technology and R&D capacity
- ❖ Expand markets and market access

Enhance Food Security at Households

Poverty Indicators	2006		2017		Growth	
	Rural	Urban	Rural	Urban	Rural	Urban
Lower Poverty Line	74.9	34.3	65.4	25.4	-13%	-26%
Food Security Line	48.2	14.6	45.6	13.4	-5%	-8%
Upper Poverty Line	87.6	52	81.3	40.6	-7%	-22%

AAMP Output I Framework Agreement: Vision, Strategic Objectives and Pillars

AAMP Vision Statement

“Globally competitive agricultural and agro-processing sectors driving market oriented and inclusive production to develop rural economies, ensure food-security, and create employment and entrepreneurial”

AAMP Strategic Objectives

- a. Promote transformation in agriculture and agro-processing sectors;
- b. Increase food security in South Africa;
- c. Accelerate the opening of markets and better access conditions;
- d. Enhance competitiveness and entrepreneurial opportunities through technological innovations, infrastructure development and digitalization;
- e. Create an effective farmer support and agro-processing incentives;
- f. Create decent and inclusive employment, and improve working conditions and decent pay in the sector including in the face of climate change and technology innovations;
- g. Increase farming community safety and reduce stock theft;
- h. Create a capable state and enabling policy environment; and
- i. Enhance resilience to climate change and management of natural resource

AAMP Pillars

- a. Resolving policy ambiguities and creating investment friendly climate
- b. Creating enabling infrastructure
- c. Providing comprehensive farmer support, development finance, R&D and extension services
- d. Ensuring food security, expanded production and employment creation
- e. Enabling markets expansion, improving market access and trade facilitation
- f. Developing localized food, import replacement and expanded agro-processing



AAMP Output II “How to Do It and Where”: Action Plan

High Level Principles by Social Partners

Labour and communities

Employment creation

Promote worker equity & ownership

Rights at Work

-Improve monitoring & enforcement by government. Ensure decent working condition

-Protect and advance rights of women

Social Dialogue *-Create bargaining councils*

Skills & upward mobility for workers

Just transitional technology

Overcome licensing challenges

Better land and housing outcomes

Business

Stimulate investments & inclusive growth

-pursue private-public partnership for infrastructure investment and value chain development

Build strong export and market access capacity

Promote market principles and farmer & SMMEs support

-Expand access to finance and biosecurity (amend regulation to allow private testing laboratory, inspectors and Vets)

Improve sector competitiveness and state capacity

-improve state capacity and efficiency (Deeds Office, Registrar Office, trade facilitation, port logistics and water boards)

Increase agro-processing and import substitution *- Drive the localisation of food*

Government

Implement policy and equitable access to natural resources

-Develop Agriculture and Land Coordinating Agency

Create enabling infrastructure and produce support

-Create and implement Blended Finance.

-Water, electricity, roads, NFPMs & R&D



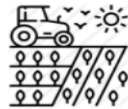



-Expand extension service capacity

Increase transformation and inclusivity in the sector

-Integrate potential Production Scheme Models for smallholder and subsistence farmers into value chain roundtables



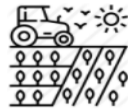



AAMP Output II “How to Do It and Where”: Action Plan

Sectoral Interventions and Impact

PILLARS	 PILLAR 1	 PILLAR 2	 PILLAR 3	 PILLAR 4	 PILLAR 5	 PILLAR 6
	Resolving policy ambiguities and creating investment friendly climate	Creating enabling infrastructure	Providing comprehensive farmer support, development finance, R&D and extension services	Ensuring food security, expanded production and employment creation, decency and inclusivity	Enabling markets expansion, improving market access and trade facilitation	Developing localized food, import replacement and expanded agro-processing exports
TARGETED COMMITMENTS	Land: Land & Agric Coord Agency 200k ha transferred per year	Water & Electricity: Dams and Irrigations Schemes Cogenerating inline with IRP	Extension Services: 10 000 extension officers in partnership & secondment to commodity associations	Develop Value Chain: Adopt value chain approach for expanding primary and processing production via private-public partnerships	Domestic Market: Increase local supermarkets & institutional procurement	Routes to Markets: Alternative Routes to Markets
	Water: Water license issued in 90 days Black farmer share to 19%	Road & Logistics: Port efficiency and capacity Off-farm infrastructure	Finance: Blended Finance Tool for farmers and SMMEs		Regional Market: Promote and implement AfCFTA – regional VC	Localization: Implement the Import Substitution Strategy
	Labour & Conditions: Worker equity & ownership Employment creation Upward mobility & Rights @W Just transitional technology	Market & Biosecurity Traceability & Identification Research and Development Project Rebirth -- NFPMs	Supplier Development Programme for SMMEs		Deep-Sea Markets: Create Trade Promotion Fund aligned to Statutory Levy by Commodity Associations	Retail Lease: Implement Competition Commission Supermarkets Recommendations
	Transformation: Production schemes for smallholder & subsistence farmers aligned to VC via PPP					
	Real GPV added R32 billion	Crops production expand by 410 000ha	Animals and Animal Product production expand by 611 000t	71 487 New Jobs created 303 223 Livelihoods supported		6 500 new SMMEs

AAMP Output II “How to Do It and Where”: Action Plan

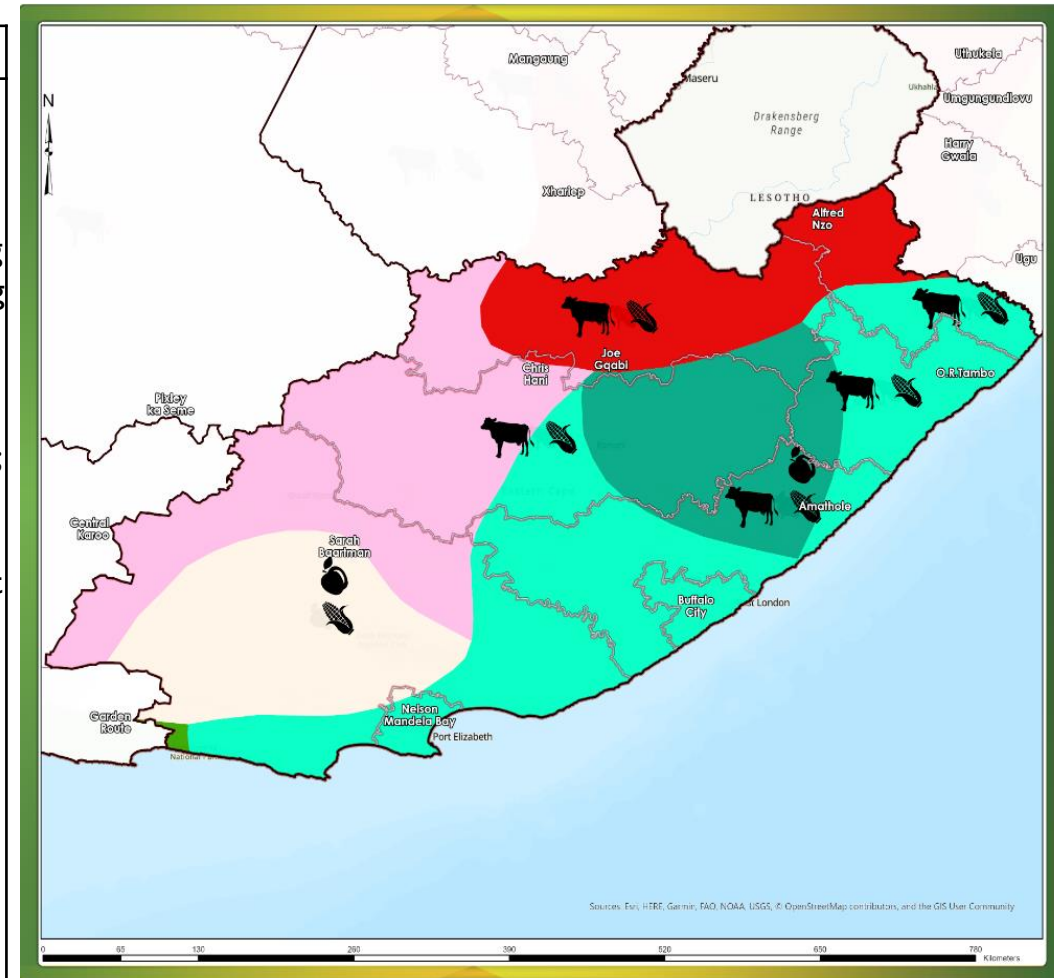
Value Chain Interventions and Impact

PILLARS	 PILLAR 1	 PILLAR 2	 PILLAR 3	 PILLAR 4	 PILLAR 5	 PILLAR 6
	Resolving policy ambiguities and creating investment friendly climate	Creating enabling infrastructure	Providing comprehensive farmer support, development finance, R&D and extension services	Ensuring food security, expanded production and employment creation, decency and inclusivity	Enabling markets expansion, improving market access and trade facilitation	Developing localized food, import replacement and expanded agro-processing exports
TARGETED COMMITMENTS	Grains & Oilseeds: Review & Modernize Act 36 Amend MAP Act	Grains & Oilseeds: Create 500 000 storage & capacity in coastal areas Increase rail share in grain transportation to 50%	Grains & Oilseed: State supported crop insurance Specialized extension officers	Grains & Oilseeds: Real GPV increased by R6.4b Black farmer share rise to 20% New Jobs (9k); Ha (410k); Ton (2.6m)	Grains & Oilseeds: Alignment with Livestock Increase import protocols	Grains & Oilseeds: Small mills & silos in rural area
	Animals & Products Amend Municipal by-laws to allow sale of live animals Implement Veterinary Strategy Implement LITS system	Animals & Products: Rural animal infrastructure	Animals & Products: Genes improvement program Specialized extension officers	Animals & Products: Real GPV increased by R18.8b Black farmer share rise to 34% New Jobs (23k); Ha (300k); Ton (611k)	Animas & Products: Increase Disease Surveillance & Monitoring – FMD, AFS, AVI	Animals & Products: Increase processing capacity
	Horticulture: Develop national traceability Review & Modernize APS Act	Horticulture Project Rebirth – NFPMs Port capacity & efficiency	Horticulture: State supported crop insurance Access to new cultivars Specialized extension officers	Horticulture: Real GPV increased by R7.1b Black farmer share rise to 12% New Jobs (22k); Ha (24k); Ton (633k)	Horticulture: Growers comply with GAP Capitalize on AfCFTA Better access to Asia markets	Agro-processing: Scale up export promotion Identify import replacement Regional harmonization & value chains
	Agro-processing Alternative Routes to markets – rural & township SMMEs	Agro-processing: Expanded Supplier Development Programme		Agro-processing: Expand supermarkets SDP		
	Real GPV added R32 billion	Crops production expand by 410 000ha	Animals and Animal Product production expand by 611 000t	71 487 New Jobs created 303 223 Livelihoods supported		6 500 new SMMEs

AAMP Output II **“How to Do It and Where”**: Action Plan

Eastern Cape Provincial Priorities and Commitments

Eastern Cape Province							Key Projects Wool Washing and Processing Facilities and Red Meat Rural Infrastructure; Irrigation Schemes, East London Harbour and Logistics include Bioenergy Production Schemes
AAMP Pillars	Hectares	Jobs	Farmers	SMMs	Households	Budget : Rmil	
Resolving policy ambiguities and creating investment friendly climate.	300,600	92,692	13,979		139,672	R2,826	
Creating production, marketing and trade infrastructure and trade facilitation		1,182	247	247	247	R603	
Market expansion and improved market access		3,003	547	300	247	R83	
Comprehensive Farmer Support, R&D and extension services		5,000	413			R101	
Enhance food security, production output and employment creation	20,200	96,243	5,862	98	3,247	R183	
Localised food, import replacement and expand agro-processing		522	14	42		R46	
Total	320,800	198,642	21,062	687	143,413	R3,842	

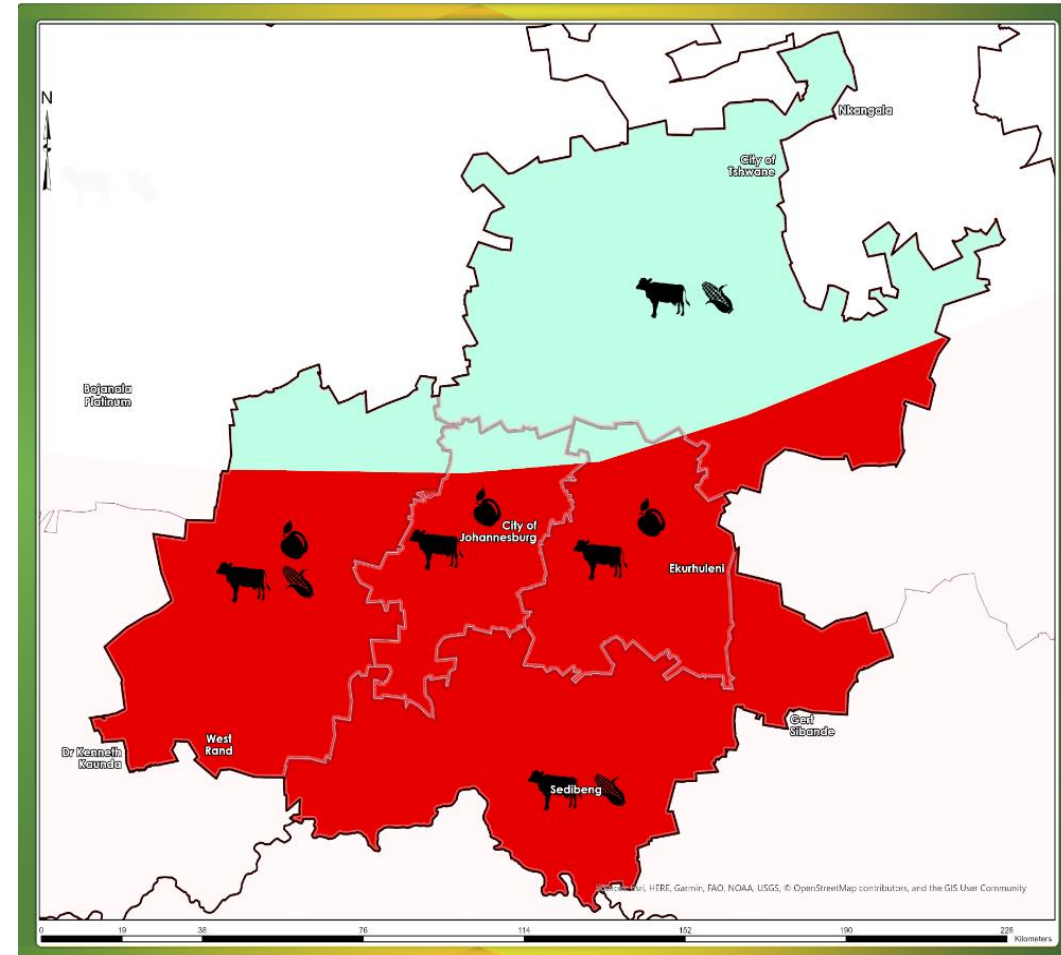


AAMP Output II **“How to Do It and Where”**: Action Plan

Gauteng Provincial Priorities and Commitments

Gauteng Province

AAMP Pillars	Hectares	Jobs	Farmers	SMMs	Households	Budget: Rmil	Key Projects: (1) Agri-parks and processing facilities within a 30km radius (2) minimum 6 new Packhouses and 5 new Abattoirs (3) Township hubs and agro-logistics
Resolving policy ambiguities and creating investment friendly climate.							
Creating production, marketing and trade infrastructure and trade facilitation							
Market expansion and improved market access							
Comprehensive Farmer Support, R&D and extension services							
Enhance food security, production output and employment creation		17,400	66				
Localised food, import replacement and expand agro-processing							
Total		17,400	66			R0	



AGRICULTURE: COMMODITIES REGIONS



- Meat
- Grains
- Fruits
- Cattle, Maize and Woolled Sheep ; Cattle, Maize and Sheep
- Cattle, Maize, Wheat, Tobacco, Peanuts, Cotton and Citrus

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AGRICULTURE & AGRO-PROCESSING SECTOR MASTER PLAN

DATE : JULY 2021 SCALE : 1:750 000
 DRAWN BY : P. NAMDASA CHECKED BY : M. GAMA

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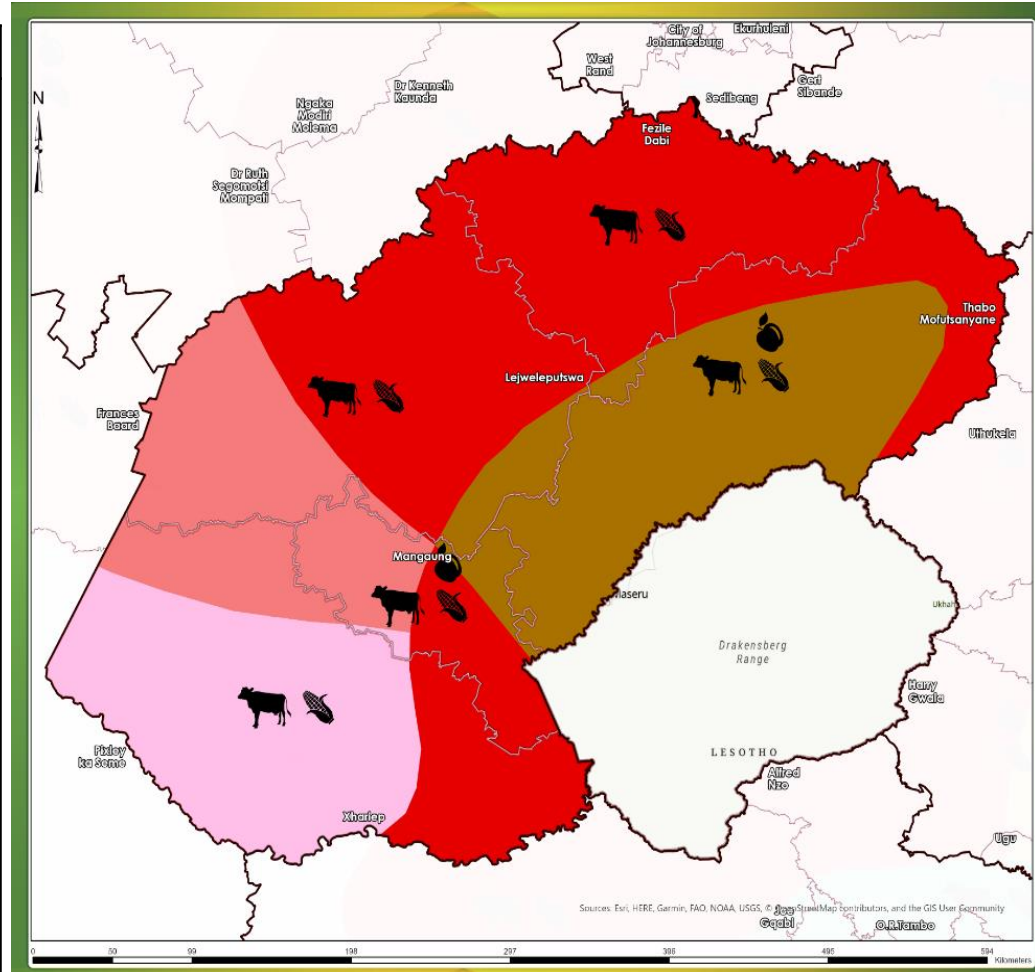


AAMP Output II **“How to Do It and Where”**: Action Plan

Free State Provincial Priorities and Commitments

Free State Province

AAMP Pillars	Hectares	Jobs	Farmers	SMMs	Households	Budget: Rmil	Key Projects:	
Resolving policy ambiguities and creating investment friendly climate.	30,000					R4		Mangaung-N8 & Free Rang Red Meat Corridors;
Creating production, marketing and trade infrastructure and trade facilitation								
Market expansion and improved market access		300	250	20	500	R492		Karoo Lamb & Dairy Value Chain
Comprehensive Farmer Support, R&D and extension services		700	300		300	R2,992		
Enhance food security, production output and employment creation	13,170	2,000	250		2,500	R2,992		Fruit & Grain Value Chain Development
Localised food, import replacement and expand agro-processing		260	67	170	800	R4,260		Fresh Water Aquaculture
Total	43,170	3,260	867	190	4,100	R10,740		



AGRICULTURE: COMMODITIES REGIONS



- Meat
- Grains
- Fruits
- Beef Cattle and (Woolled) Sheep
- Cattle, Maize and Woolled Sheep
- Cattle, Maize, Wheat and Woolled Sheep
- Cattle, Maize, Wheat and Woolled Sheep
- Cattle, Sheep and Goats
- Cattle, Sheep, Goats and Maize
- Sheep, Woolled Sheep

AGRICULTURE & AGRO-PROCESSING SECTOR MASTER PLAN

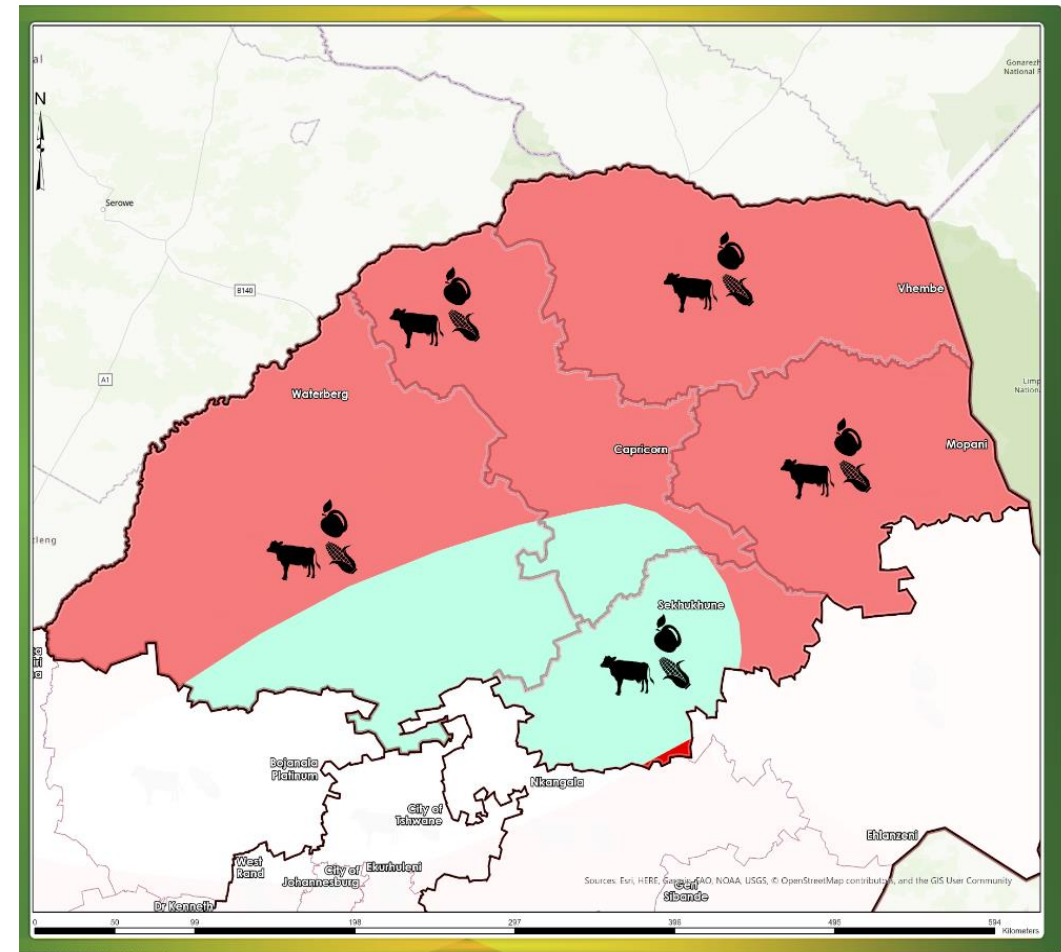
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AAMP Output II **“How to Do It and Where”**: Action Plan

Limpopo Provincial Priorities and Commitments

Limpopo Province							Key Projects: AgriHubs and processing facilities; Irrigations scheme and Fresh Produce Market Production Schemes for fruits, grains, nuts, vegetables, goat and red meat
AAMP Pillars	Hectares	Jobs	Farmers	SMMs	Households	Budget : Rmil	
Resolving policy ambiguities and creating investment friendly climate.	12,250	16,093	800	800		R2,500	
Creating production, marketing and trade infrastructure and trade facilitation		20,003	4,573		5,500	R2,137	
Market expansion and improved market access		1,200	450	450		R160	
Comprehensive Farmer Support, R&D and extension services		4,410	2,973	2,973		R383	
Enhance food security, production output and employment creation	13,640	5,500				R4	
Localised food, import replacement and expand agro-processing		300	350	350		R150	
Total	25,890	47,506	9,146	4,573	5,500	R5,334	



AGRICULTURE: COMMODITIES REGIONS

Meat
Grains
Fruits

Beef Cattle and Woolled Sheep
Cattle, Maize and Woolled Sheep
Cattle, Maize, Wheat, Tobacco, Peanuts, Cotton and Citrus

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AGRICULTURE & AGRO-PROCESSING SECTOR MASTER PLAN

DATE: JULY 2021 | SCALE: 1:1 930 000
DRAWN BY: P. NAKIKASA | CHECKED BY: M. GAMA

agriculture, land reform & rural development
Department: Agriculture, Land Reform and Rural Development
REPUBLIC OF SOUTH AFRICA

AAMP Output II **“How to Do It and Where”**: Action Plan

North West Provincial Priorities and Commitments

North West Province

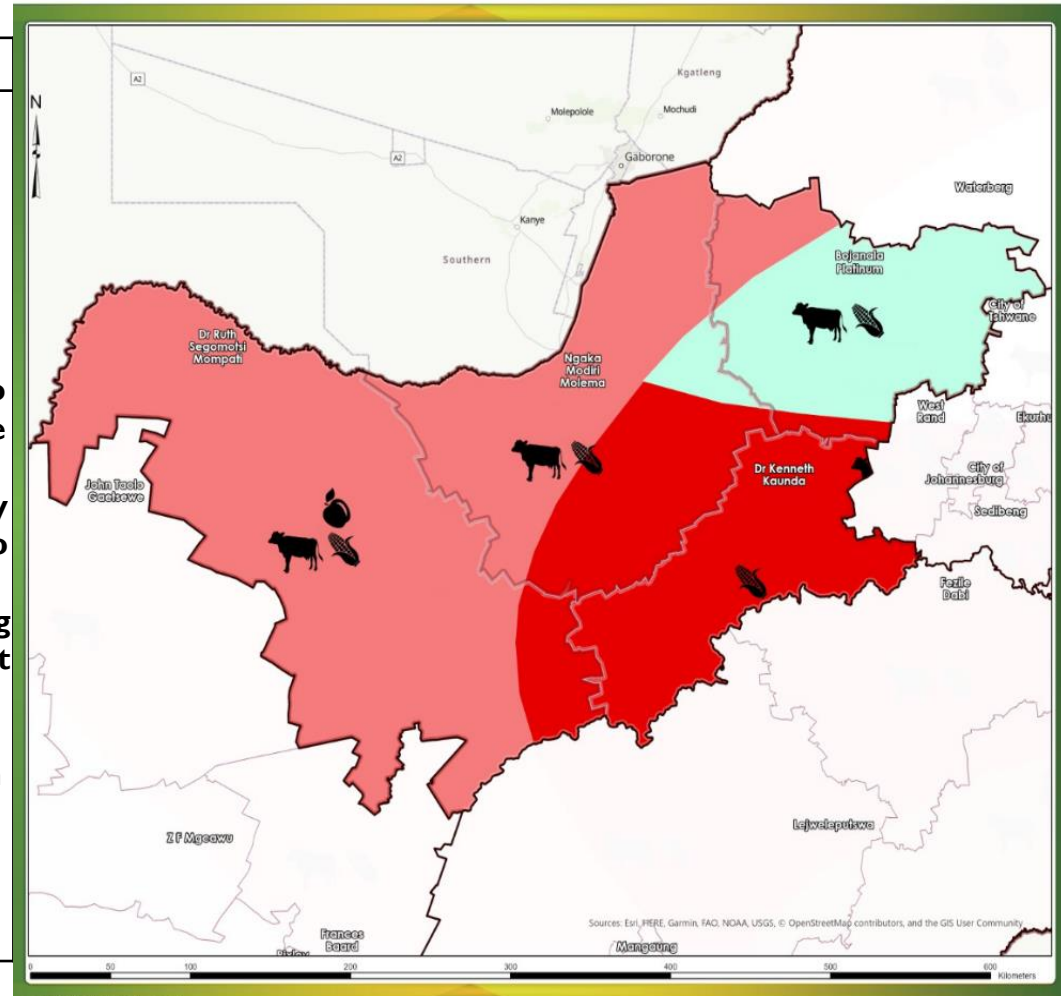
AAMP Pillars	Hectares	Jobs	Farmers	SMMs	Households	Budget : Rmil
Resolving policy ambiguities and creating investment friendly climate.	31,000	236	1,314	600	1,314	R135
Creating production, marketing and trade infrastructure and trade facilitation		3,379	108	69	1,125	R276
Market expansion and improved market access		152	280	130	191	R82
Comprehensive Farmer Support, R&D and extension services		2,566	1,670	67	3,841	R250
Enhance food security, production output and employment creation	33,390	275	40	2	80	R119
Localised food, import replacement and expand agro-processing	10	98	98	2	1	R24
Total	64,400	6,706	3,510	870	6,552	R886

Key Projects:

(1) Goat and piggery Production Scheme

(2) Electricity Generation and processing infrastructure

(3) Taung irrigation schemes



AGRICULTURE: COMMODITIES REGIONS



- Meat
- Grains
- Fruits
- Beef Cattle and (Woolled) Sheep
- Cattle, Maize and Woolled Sheep ; Cattle, Maize and Sheep
- Cattle, Maize, Wheat and Woolled sheep
- Cattle, Maize, Wheat, Tobacco, Peanuts, Cotton and Citrus
- Sheep \ Woolled Sheep

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AGRICULTURE & AGRO-PROCESSING SECTOR MASTER PLAN

DATE: JULY 2021 SCALE: 1:2 000 000
DRAWN BY: P. NABUKASA CHECKED BY: M. GAMA

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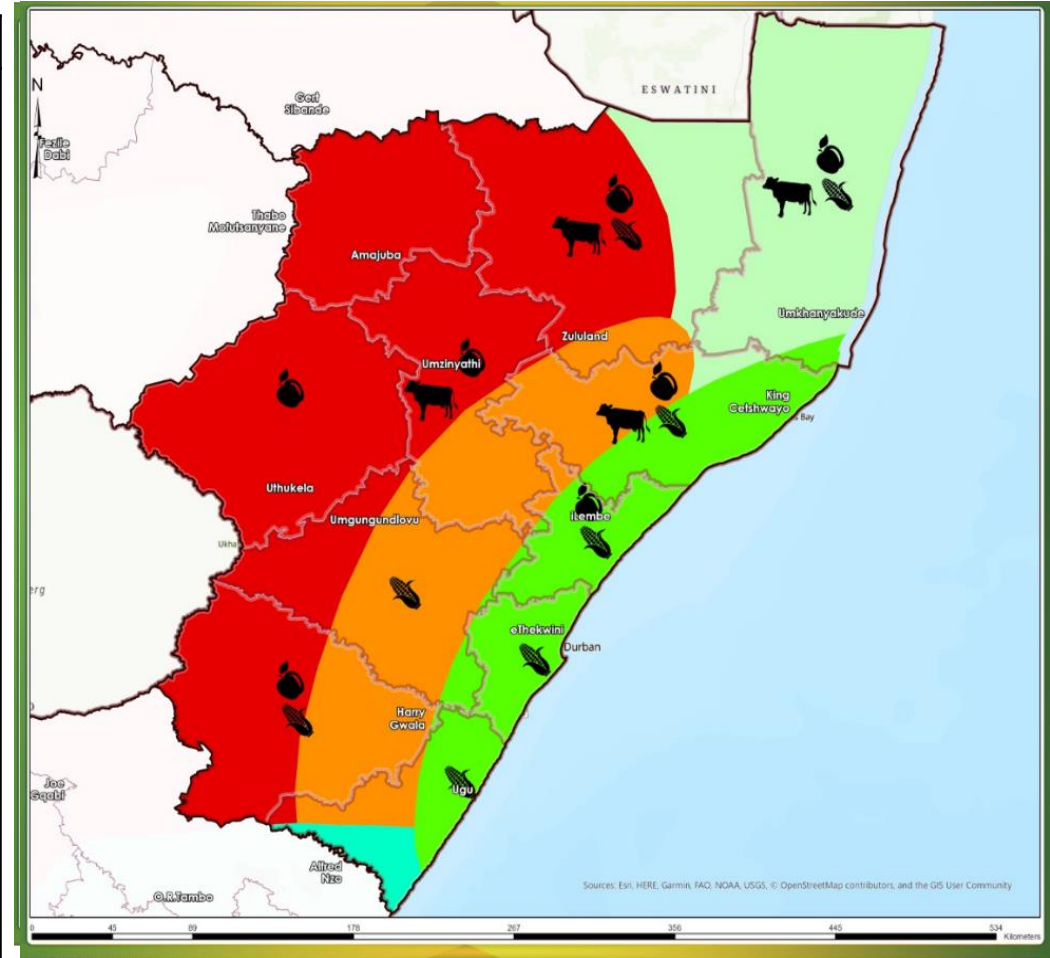


AAMP Output II “How to Do It and Where”: Action Plan

KZN Provincial Priorities and Commitments

KwaZulu Natal Province

AAMP Pillars	Hectares	Jobs	Farmers	SMMs	Households	Budget : Rmil	Key Projects: (1) Abattoirs and rural infrastructure (Dips, Dams and Road), include Biofuels and Bioenergy (2) Veterinary Services and FMD Fence (3) Markets and Agro-processing Facilities (4) Multisectoral Food and Nutrition Security Council
Resolving policy ambiguities and creating investment friendly climate.							
Creating production, marketing and trade infrastructure and trade facilitation							
Market expansion and improved market access							
Comprehensive Farmer Support, R&D and extension services							
Enhance food security, production output and employment creation							
Localised food, import replacement and expand agro-processing							
Total							



AGRICULTURE, COMMODITIES REGIONS

- Meat
- Grains
- Fruits
- Beef Cattle
- Cattle, Maize and Woolled Sheep; Cattle, Maize and Sheep
- Cattle, Maize, Wattle and Woolled Sheep
- Cattle, Maize, Wheat and Woolled Sheep
- Cattle, Sheep and Goats
- Cattle, Sheep, Goats and Maize
- Sugar Cane

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AGRICULTURE & AGRO-PROCESSING SECTOR MASTER PLAN

DATE: JULY 2021 SCALE: 1:1 750 000

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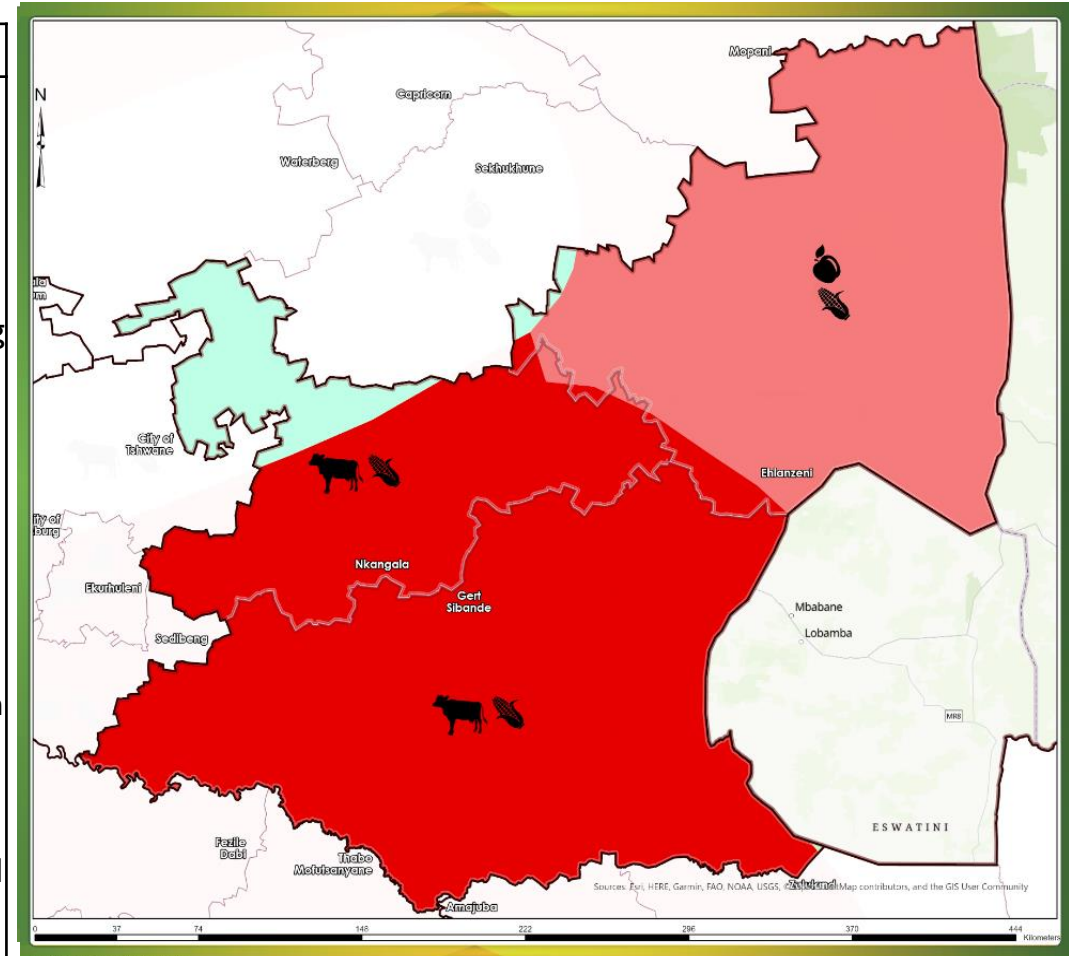
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AAMP Output II **“How to Do It and Where”**: Action Plan

Mpumalanga Provincial Priorities and Commitments

Mpumalanga Province

AAMP Pillars	Hectares	Jobs	Farmers	SMMs	Households	Budget: Rmil	Key Projects: (1) AgriHubs and processing facilities; (2) Irrigations scheme and MP Fresh Produce Market (3) Production Schemes for sugarcane, nuts, vegetables and red meat
Resolving policy ambiguities and creating investment friendly climate.	16,395						
Creating production, marketing and trade infrastructure and trade facilitation		110	16,000	50	16,000	R361	
Market expansion and improved market access		48,073	1,087	296	5,517	R566	
Comprehensive Farmer Support, R&D and extension services		500	3,000	27	3,500	R22	
Enhance food security, production output and employment creation	19,975	2,081	4,788	78	5,428	R249	
Localised food, import replacement and expand agro-processing							
Total	36,370	50,764	24,875	451	30,445	R1,198	



AGRICULTURE: COMMODITIES REGIONS



- Meat
- Grains
- Fruits
- Beef Cattle
- Beef Cattle and (Woolled) Sheep
- Cattle, Maize and Woolled Sheep
- Cattle, Maize, Wheat, Tobacco, Peanuts, Cotton and Citrus

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AGRICULTURE & AGRO-PROCESSING SECTOR MASTER PLAN

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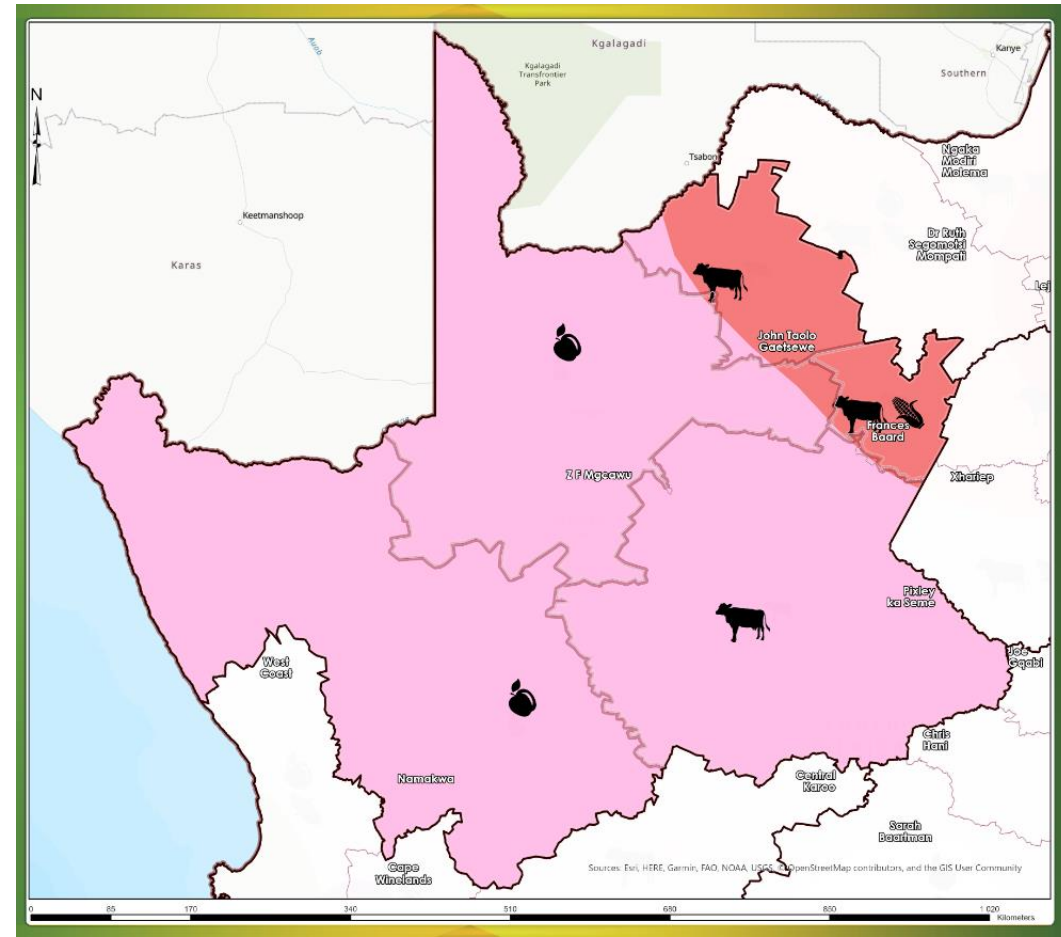


AAMP Output II **“How to Do It and Where”**: Action Plan

Northern Cape Provincial Priorities and Commitments

Northern Cape Province

AAMP Pillars	Hectares	Jobs	Farmers	SMMs	Households	Budget: Rmil	Key Projects: (1) Processing Facility in Vanderkloof, Red Meat Factor in JTG and Feed Processors; (2) Resuscitate Goat Value Chain (3) Skills Centre and Eco-tourism and 20 irrigation farms
Resolving policy ambiguities and creating investment friendly climate.	33,000	300				R2,607	
Creating production, marketing and trade infrastructure and trade facilitation		620	227		291	R125	
Market expansion and improved market access							
Comprehensive Farmer Support, R&D and extension services							
Enhance food security, production output and employment creation	27,700	375	348	75	650	R1,404	
Localised food, import replacement and expand agro-processing		585				R233	
Total	60,700	1,880	575	75	941	R4,368	

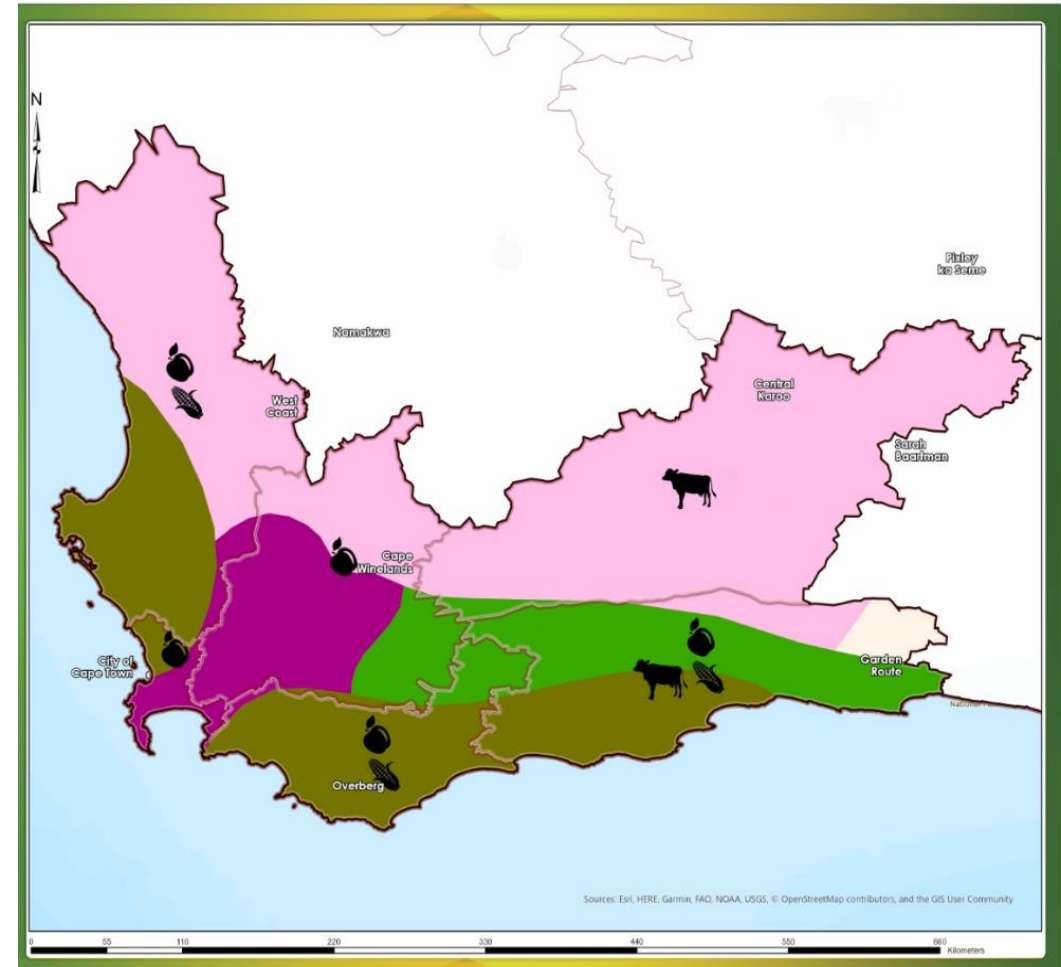


AAMP Output II **“How to Do It and Where”**: Action Plan

Western Cape Provincial Priorities and Commitments

Western Cape Province

AAMP Pillars	Hectares	Jobs	Farmer s	SMM Es	House holds	Budget: Rmil	Key Projects: (1) Brandvlei Dam by 33mil m3; Buffeljags Dam from 12 to 23.3 mil m3 (3) Clanwilliam Dam wall increase by 13m to obtain 169 mil m3 (4) Production Schemes
Resolving policy ambiguities and creating investment friendly climate.	48,000	2,160				R74	
Creating production, marketing and trade infrastructure and trade facilitation						R5,271	
Market expansion and improved market access		2,300	6,680				
Comprehensive Farmer Support, R&D and extension services		9,450	11,505			R3,659	
Enhance food security, production output and employment creation	4,400	3,000	422	375	5,310	R418	
Localised food, import replacement and expand agro-processing			258			R750	
Total	52,400	16,910	18,865	375	5,310	R10,172	



AGRICULTURE: COMMODITIES REGIONS



- Meat
- Grains
- Fruits
- Angora Goats and Sheep
- Cattle, Sheep and Goats
- Irrigation Farming
- Sheep, Woolled Sheep
- Wheat and Woolled Sheep
- Wine and Deciduous Fruits

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AGRICULTURE & AGRO-PROCESSING SECTOR MASTER PLAN

DATE: JULY 2021 SCALE: 1:2,500,000
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AAMP Output II: Action Plan

Short –Medium Impact in the Sector

Commodity	Hectares (2018/19)	NDP 2030 growth target	Commercial Employment	Black farmer current share (%)	AAMP output added (ha)	AAMP output added (tons)	AAMP 2030 Real GPV added	AAMP 2030 jobs created	AAMP 2030 livelihood created	Black farmer future share (%)
Macadamia Nuts	37,000	11,970	18,130	2.1% (3%)	2,528	5,567	R466,263,563	1,239		19%
Citrus	83,488	15,000	118,553	2.1% (9%)	3,438	126,788	R1,196,853,590	4881		19%
Avocado Pears	18,000	9,275	6,000	3.0%	1,165	19,395	R335,353,315	388		19%
Grapes (Table)	21,000	4,705	34,020	8.1% (9.9%)	1,931	29,980	R981,379,692	4217		19%
Wine Grapes & Wine	91,221	0	44,698	1.9% (2.5%)	6,395	64,943	R2,768,269,971	3571		8%
Apples	24,176	2,532	30,220	3% (7.8%)	2,517	113,750	R722,424,793	3046		19%
Potatoes**	52,966	6,417	30,102	1% (>1%)	13,928	909,344	R2,419,605,763	15,715		20%
Maize	2,300,000	356,980	30,809	Black farmer share	274,342	1,939,023	R 7,756,155,412	5,267	16,000	20%
Soybeans	730,000	376,200	9,131	3.1%	83,000	594,000	R 2,565,935,951	2,664	2,000	12%
Cotton	42,566	25,000	2,625	2.4% (4.4%)	30,657	105,076	R 1,330,299,948	1,380	19,596	26%
	Tons - (2018/19)	NDP 2030 growth target	Commercial Employment	Black farmer share current (%)*		AAMP output added (tons)	AAMP 2030 impact Real GPV	AAMP 2030 impact jobs	AAMP 2030 livelihood created	Black farmer future share (%)
Poultry	1,693,000	663,500	37,246	4.2% (9%)		188,680	R4,246,717,325	5660	22665	15%
Beef	763,000	282,600	18,541	34.0%		134,357	R8,175,448,721	3200	39600	50%
Wool	51,600	20,475	35,000	11.0%		12,413	R2,163,556,802	6373	6450	16%
Mohair	2,080	N.A	6,054	12.8%		30.00	R8,637,911	212		15%
Goats	43,562	N.A		82.0%		20,300	R255,000,000	22,354	133,061	86%
Dairy	3,341,000	522,735	33,410	7.0%		183,645	R1,396,998,405	222	16160	10%
Pork	240.510	25.715	5.291	4.4% (10%)		71.623	R2,512,921,204	2149	47601	18%

Growth
R32 bil GPV
303233
livelihood

Unemploy
71 487 new
jobs
6 500 SMMEs
303233
livelihood

Inequality
19% Black
Share
410 000 new
Ha
1.2ml ppl out
of poverty



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Agriculture, Land Reform and Rural Development
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