

The Changing Policy Landscape and Priorities for 2025

Agbiz media day
6 December 2024
Theo Boshoff



Top 10 trends in global agribusiness (IFAMA 2024)

1. Agriculture in controlled environments; - Threat to counter-seasonal advantages?
2. Gene-editing technology; - SA Regulatory regime NB!
3. Biological editing options (lactose-free milk?);
4. Farms as power plants;
5. Sustainable aviation fuel; - relief for sugar industry?
6. Digital agriculture (i.e. sensors, remote monitoring etc.);
7. Artificial Intelligence (production + marketing, supply & demand etc.)
8. Metaverse of the food chain (block chain & big data);
9. Return to mechanical herb control (via robots); - consider labour implications
10. Agriculture's role in preventative healthcare (promoting healthy food options through benefits).

Threats

Opportunities

Rising protectionism

Geopolitical instability

Green trade barriers

GNU / political stability

Rail reforms

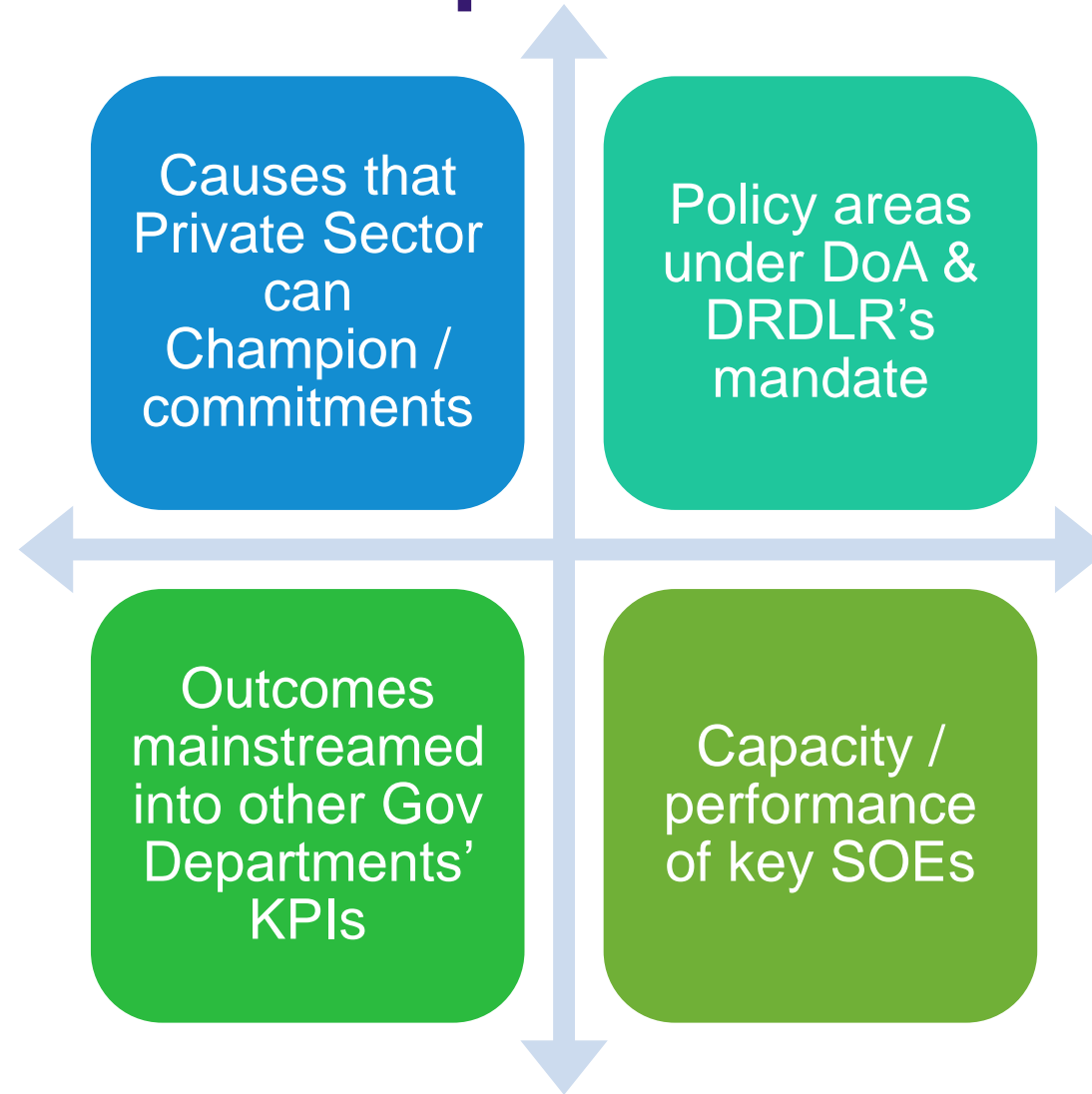
Energy security

SA positioning –
AGOA, BRICS, G20



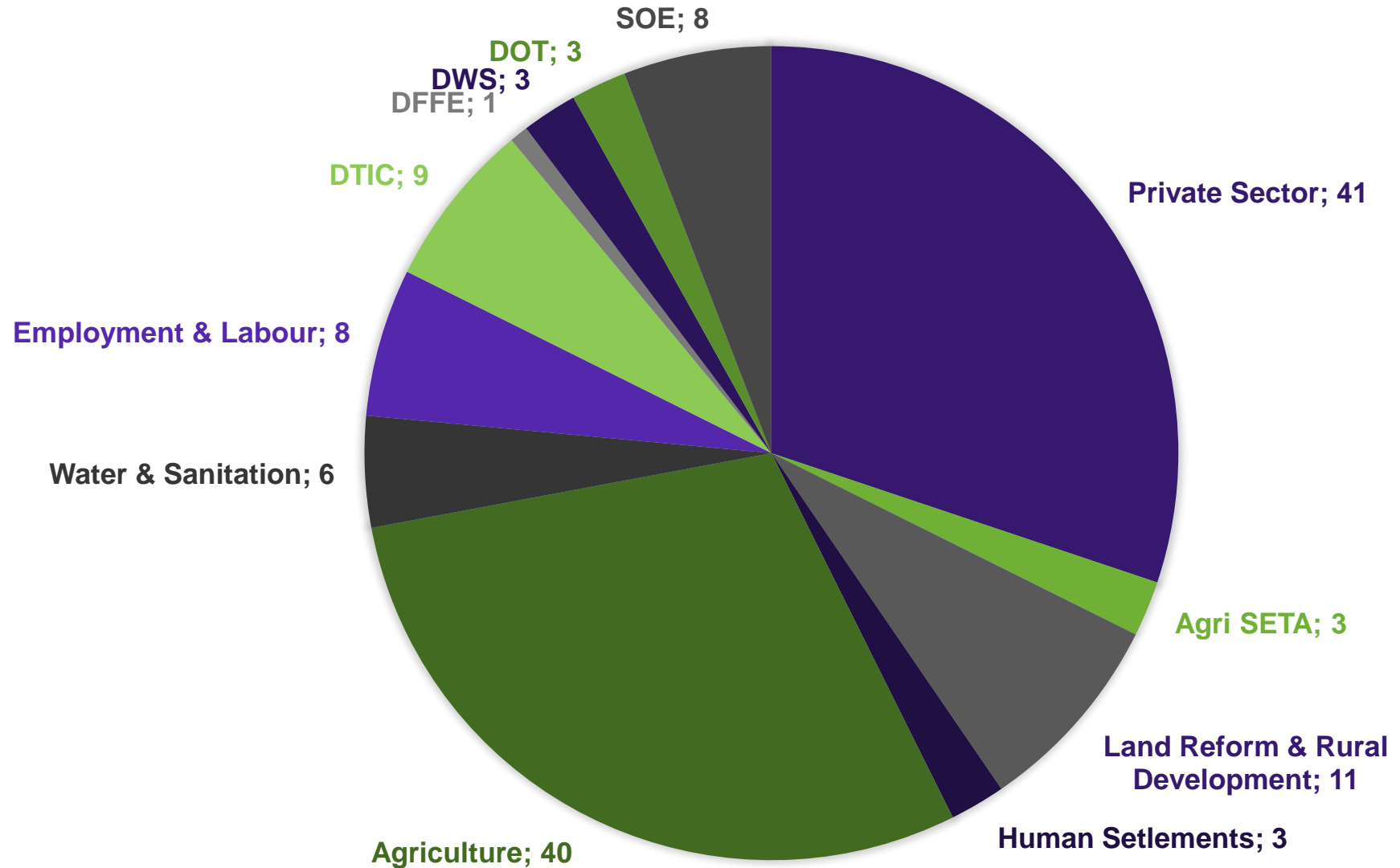
Agricultural & Agroprocessing Master Plan

AAMP - Who will champion?



Summary of pillars

- 137 initiatives
- 30 duplicates
- *“Promote private land donations in accordance with the land donation policy” & “Promote private land donations by the DALRRD’s land donation policy”*
- 1 Contradiction
- *“transfer ownership of PLAS farms vs long-term leases for PLAS farms”*
- 8 mere statements
- *“The lack of critical animal vaccines is a significant threat to the livestock & equestrian industry and food production.”*

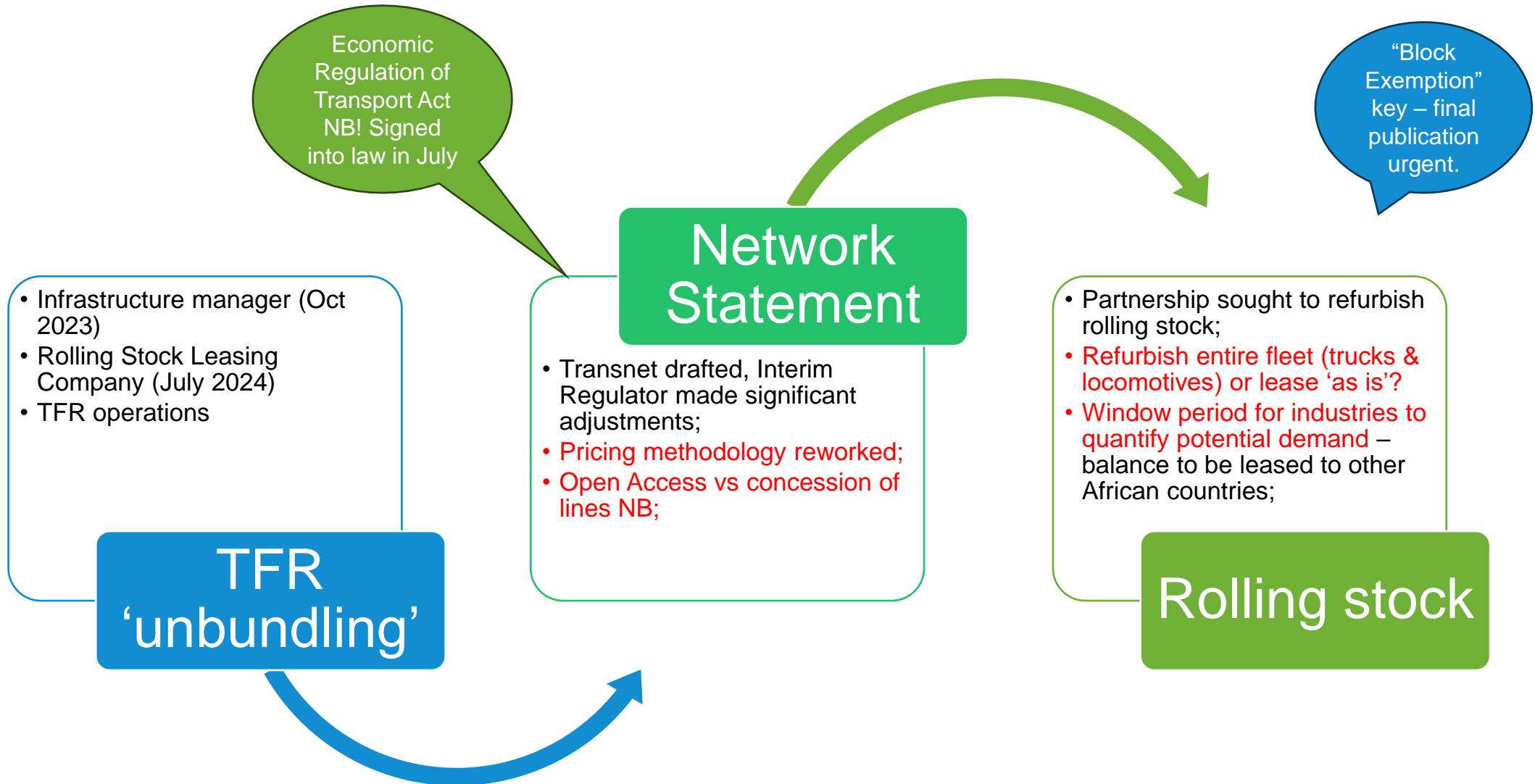


Way forward AAMP

- Labour issues finalised;
- National Planning Commission advisory;
 - Bring staff in for PMU;
 - PMU to drive process but 'champions' are needed with subject matter knowledge;
- 2 champions per initiative (gov + sector) key stakeholders needed per initiative;
- Building blocks for implementation plan;
 - Medium-term objectives;
 - Deliverables & milestones;
 - Dependencies; &
 - Rationalise duplications / cluster similar initiatives.
 - Identify green / amber / red items;
- Pareto principle – PMU to focus on 80/20;
- NB! – no 'free-riders' in a coalition of the willing!

Logistics

Logistics - rail



Logistics: Ports

Challenges

Durban

- Pier 2 tender interdicted;
 - ICTSI allowed to use market capitalization method opposed to proving liquidity ratio – procedural irregularity.
- Judicial review of appointment in March;
 - Replace ICTSI with rival (unlikely)
 - Restart bidding process (more likely);

Cape Town

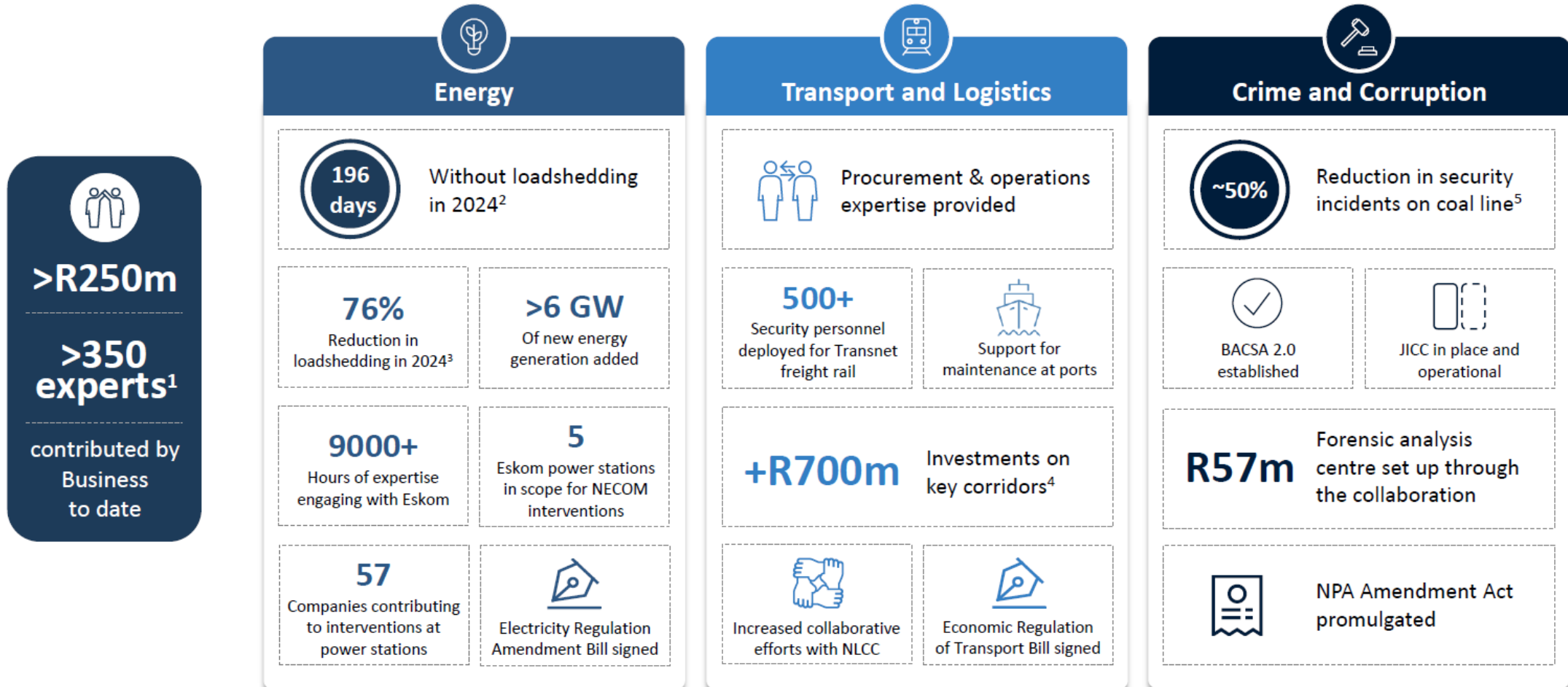
- Focus now on assisting TPT & managing the backwards flow into the value chain to get through the peak season;

Progress

- PSP unit established under DoT – formal call for project proposals anticipated soon;
- World Bank Advisory Support secured;
- Operational Excellence Centers & Corridor Recovery Teams established;
- COO established for Transnet Group (will eventually take over from B4SA);

Government & Business partnership

The Partnership has mobilised significant expertise and resources, with considerable progress since inception; but more needs to be done



ESG / Sustainability initiative

Agbiz sustainability initiative

Members' committee
to guide work

- The who, what & where of ESG
- Determine members' needs & pressures

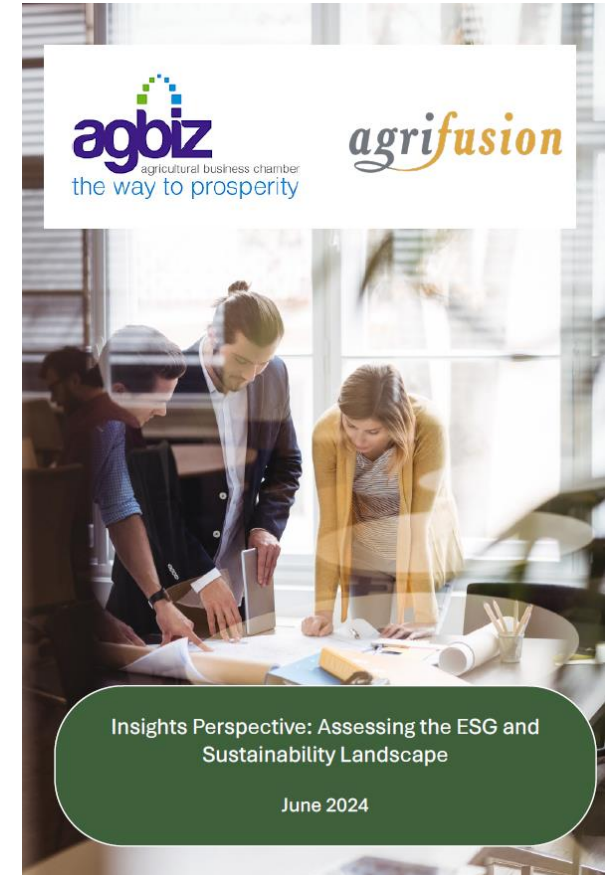
Workshop
Feb 24

Feb – June
24

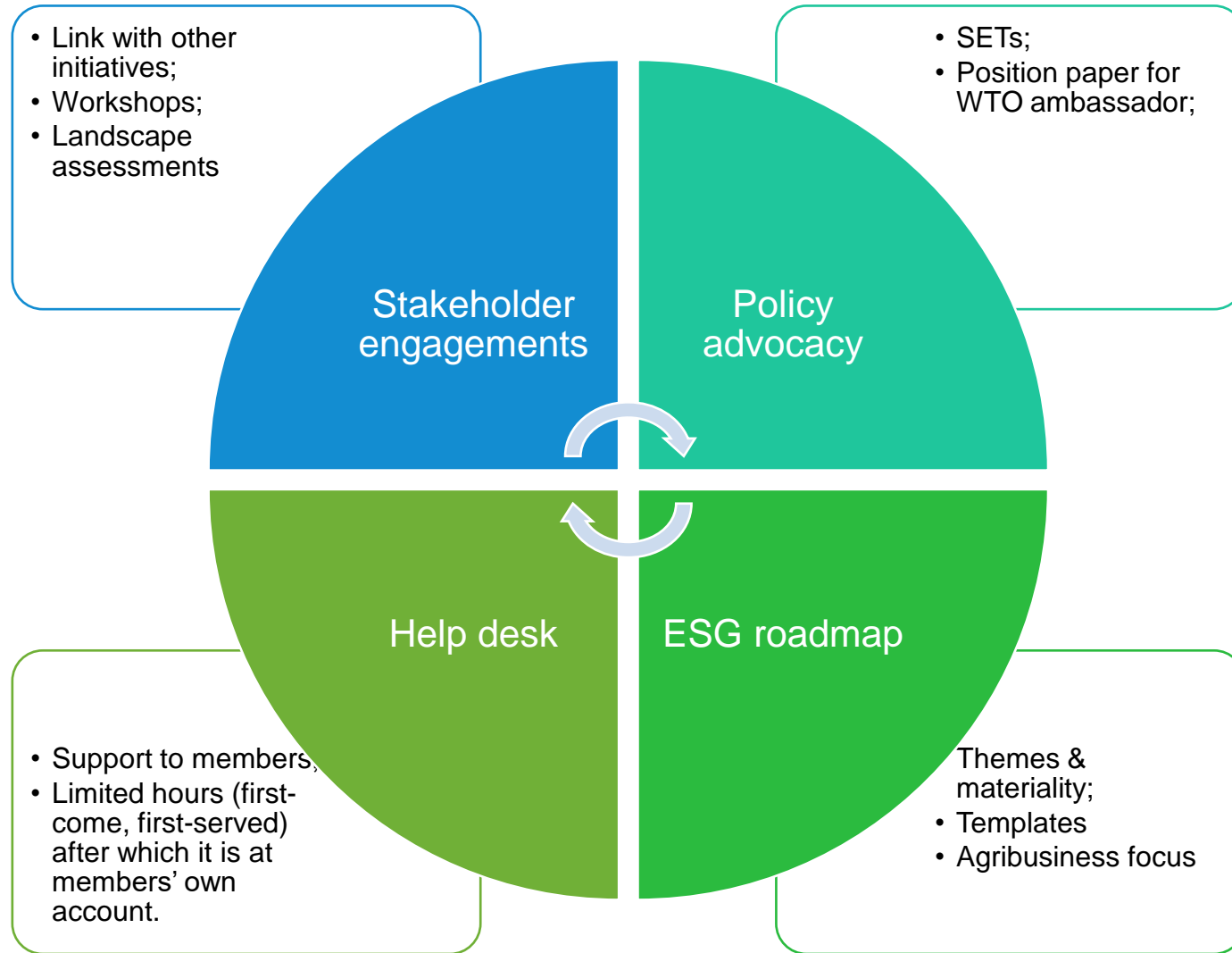
- Discussion document
- Sample agribusinesses to determine materiality;
- ESG insights paper

- Agbiz Congress session;
- Launch position paper;
- Panel discussion

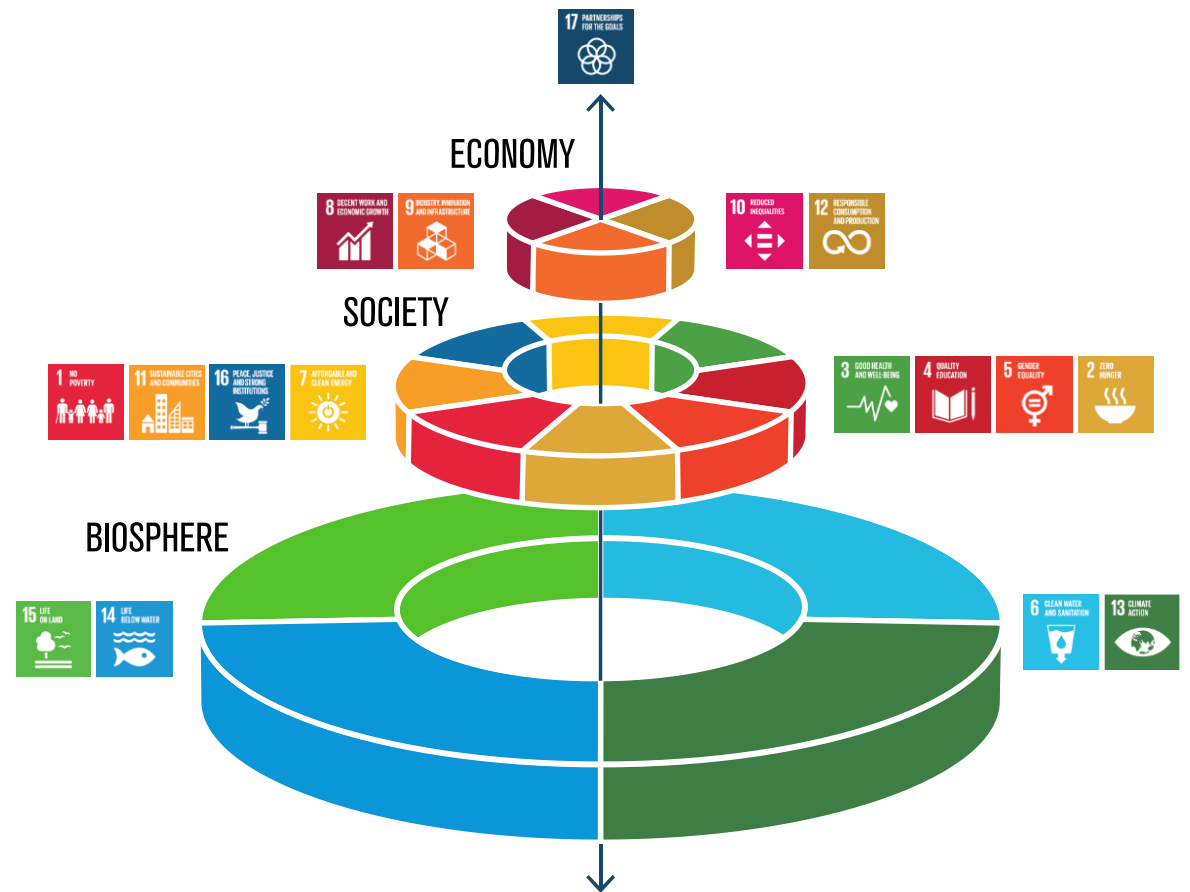
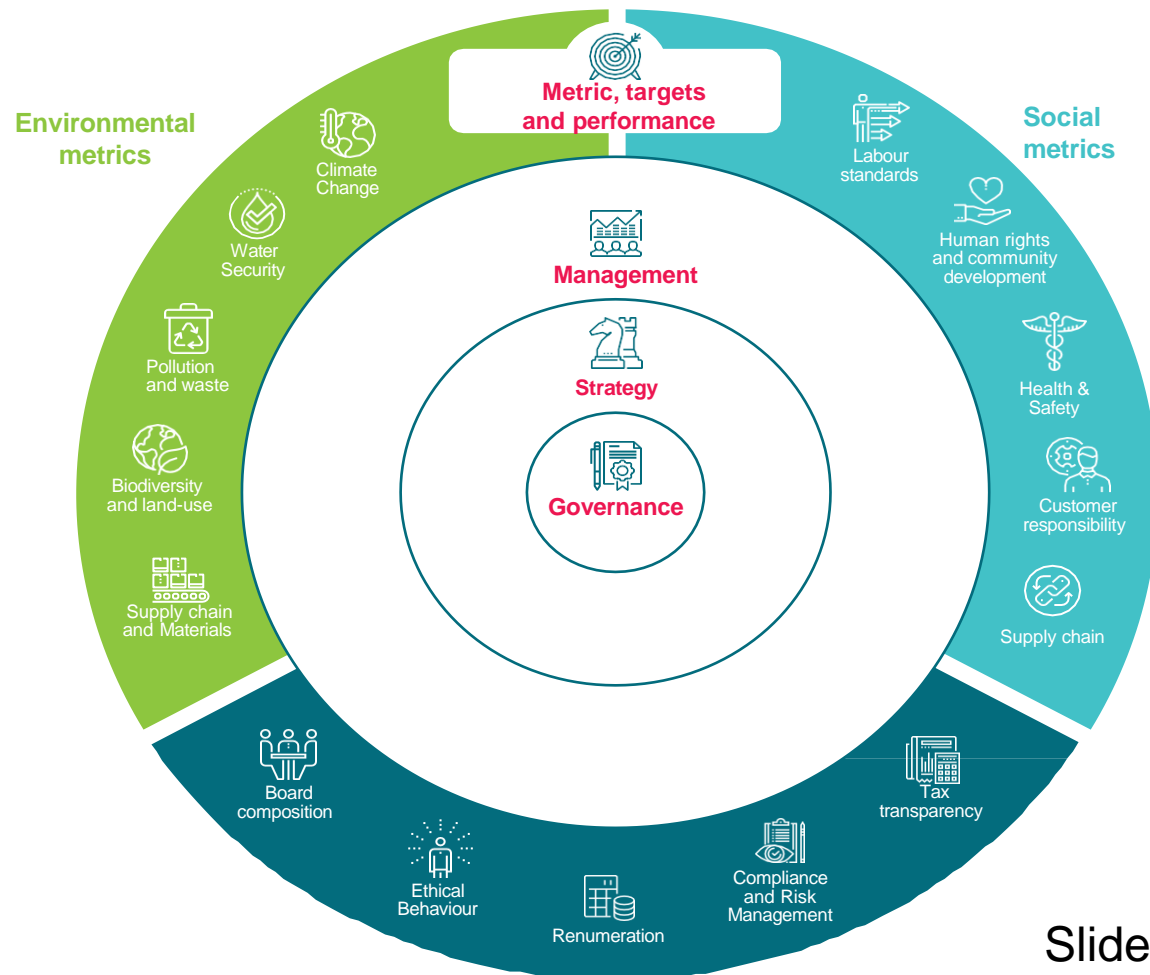
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Scope & purpose of phase 2



ESG roadmap – methodology to guide companies



Slide courtesy of *agrifusion*

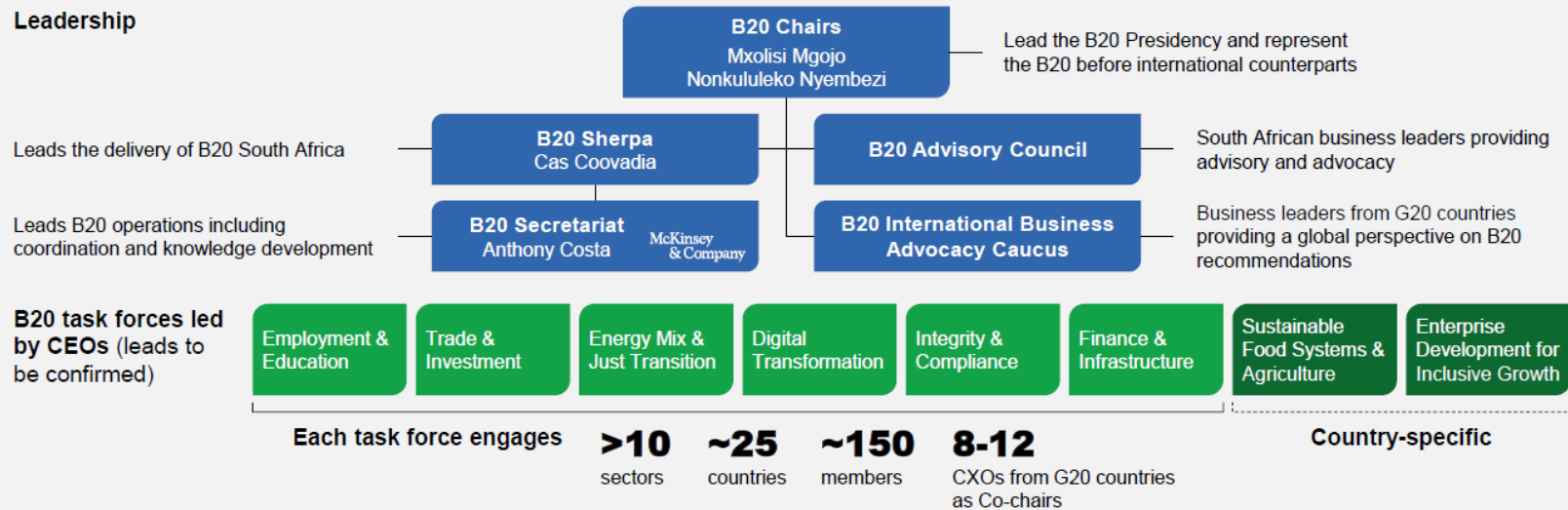
G20 & B20

G20 & B20

B20 South Africa is designed to draw on global and local expertise

PRELIMINARY

Leadership



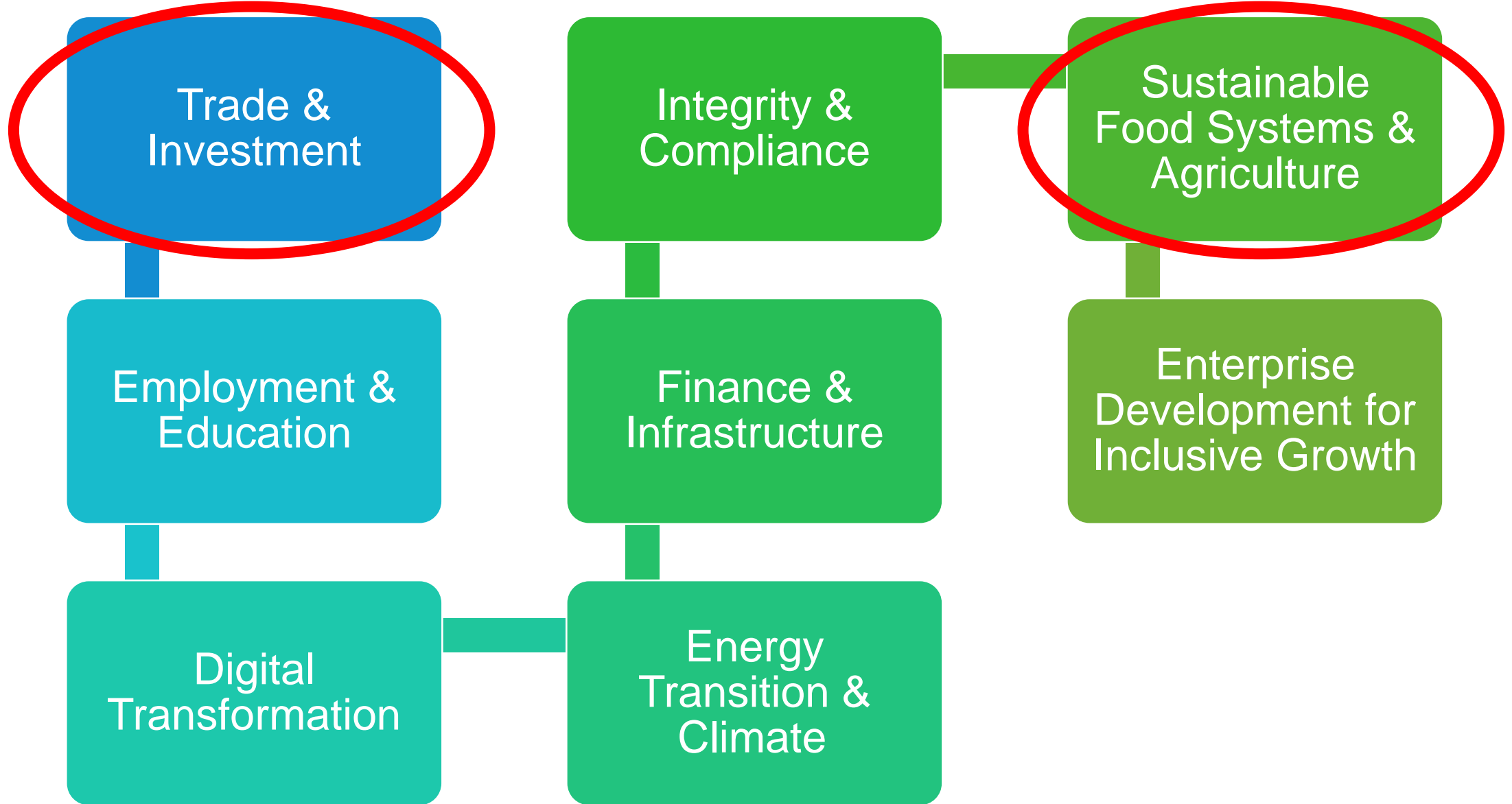
Knowledge partners and supporting stakeholders from B20 Brazil 2024



- G20 represents 80% of global trade; and
- 75% of global GDP;
- B20 comprised of business bodies who make policy recommendations to G20 governments;
- 2023 – India
- 2024 – Brazil
- 2025 – South Africa
- 2026 – USA

Voice of the global South NB!

G20 & B20



G20 / B20



B20 INFORMATION SESSION: SUSTAINABLE FOOD SYSTEMS AND AGRICULTURE

TO BE HELD FROM 16:00 – 17:00 ON THE 25th OF NOVEMBER 2024

VIA MS TEAMS

1	Opening and welcome	Theo Boshoff (Agbiz)	5 mins
2	Purpose of the session	Theo Boshoff (Agbiz)	5 mins
3	Background to the B20 and South Africa's involvement	Cas Coovadia (BUSA)	20 mins
4	Lessons learned from Brazil	Rodrigo Santos (Bayer)	20 mins
5	Overview of the recommendations emanating from Brazil	Theo Boshoff (Agbiz)	10 mins
6	Questions & answers session	Facilitated by Theo Boshoff	10 mins
7	Closing & thanks	Sean Walsh TBC (Agbiz chairperson)	

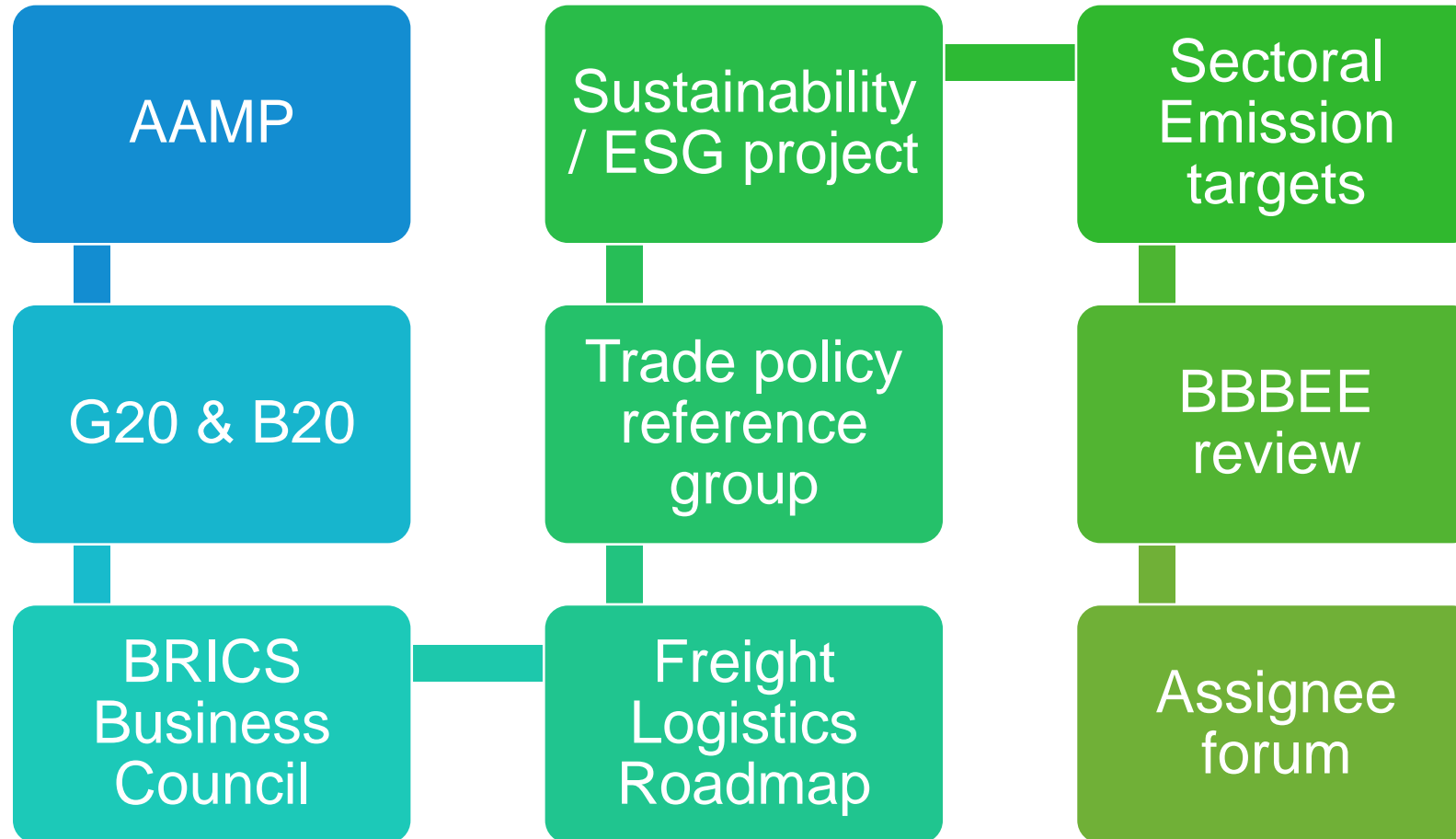
B20 trade & agriculture

Brazil's policy recommendations:

- *non-discriminatory, inclusive, and equitable multilateral agricultural trading system*
- *Eliminating market distorting barriers*
- *Financing mechanisms for decarbonization;*
 - *Common but differentiated responsibility a sticking point!*
- *streamlining and harmonizing customs processes and procedures*
- *reforming the WTO Dispute Settlement Body*

Much for SA to build on

Big ticket items on the horizon for 2025



Thank you

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