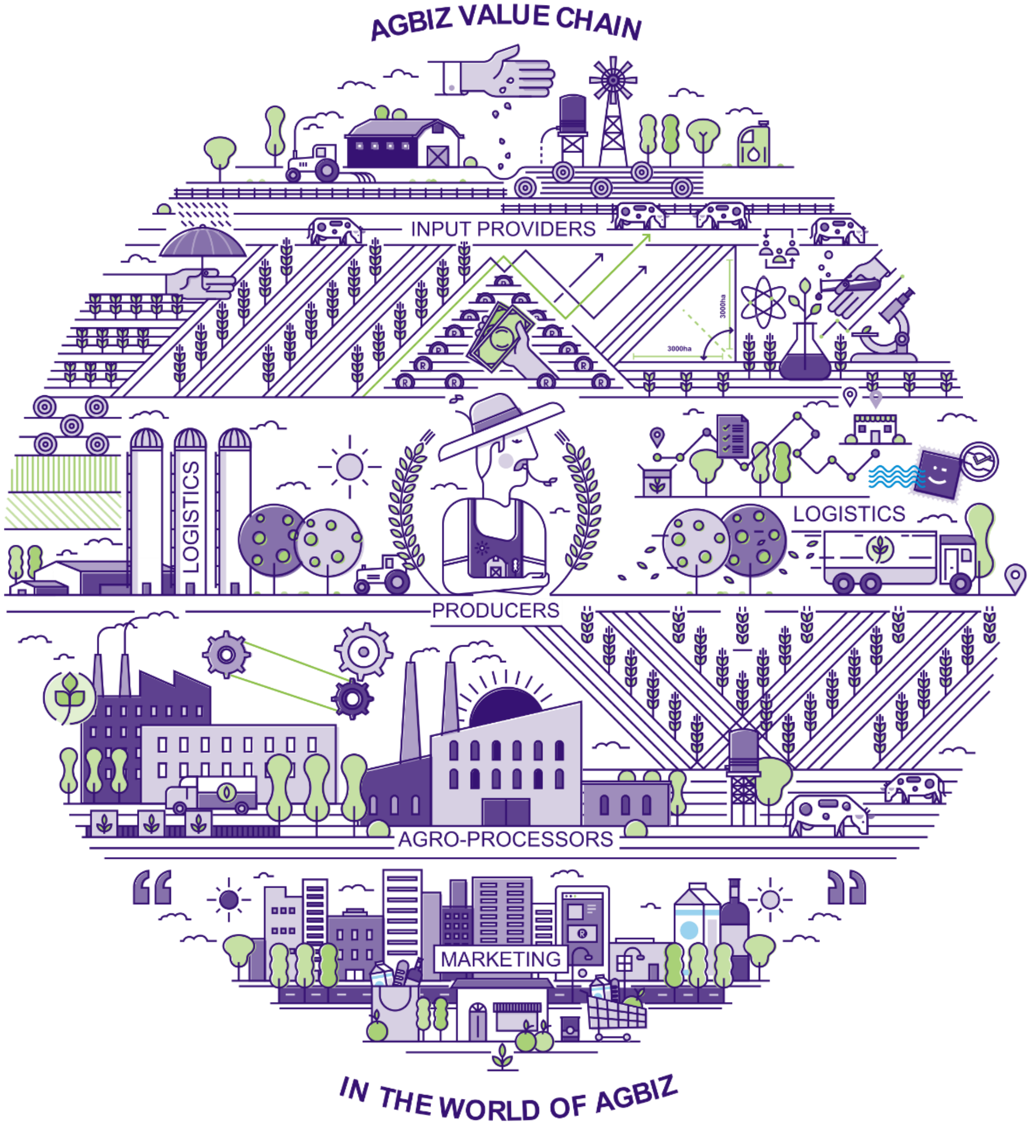
Welcome and introduction:

Current challenges in policy and legislation environment, and opportunity in the agribusiness sector

Agbiz Information Day

John Purchase
CEO: Agbiz

15 November 2018



- Agbiz represents the agricultural value chain outside of primary production;
- This includes;
  - Input providers such as seed, fertilizer and machinery manufacturers;
  - Financial institutions and insurance companies;
  - Logistics;
  - Off-takers, Agro-processors; and
  - Trade and market linkages.
- Primary agriculture contributes 2-3% of GDP, but together with the value chain, it is closer to 14%.
- Significant employer in rural towns and areas.

www.members.agbiz.co.za

ABSA
AFGRI
AFMA SAFE FEED FOR SAFE FOOD
AGRIFRIEND Equipment
agrifusion
Alltech
AGRI TOURISM SOUTH AFRICA
Afrivet Like your vet in the veld

AVCASA
AGRI EXPO
AGRI ACADEMY SOUTH AFRICA Sustainable Market Access through comprehensive
BHBW A Barloworld and BayWa company
batho pele Cultivate Potential . . . Harvest Excellence !
BKB
Beefmaster
CAPESPAN GROUP LIMITED
CertiSure

Citrus Growers' Association OF SOUTHERN AFRICA
DURBAN Fresh Produce MARKET
DUPONT PIONEER
ENGEN
east london idz business streamlined
Farmwise grains
FKB
FNB First National Bank
GWK innovate agriculture

IDC Industrial Development Corporation Your partner in development finance
IMASA
JOHN DEERE FINANCIAL
fpéf SOUTH AFRICA Fresh Produce Exporters' Forum
KAAP AGRI
LAND BANK We stand by you
KLK
Komati FRUIT Group
MARSH

MONSANTO
MOSSTRICH GROEP
National Agricultural Marketing Council
NETAFIM GROW MORE WITH LESS
NEDBANK
NWK
OBARO

OLDMUTUAL
Overberg AGRI GROUP
OVK CMW
PMI THE POWER OF LEARNING
pwc
Rovic Leers Leading Farming Technology
SANSOR
OLDMUTUAL INSURE

San Miguel THE GLOBAL CITRUS EXPERTS
SALTCOR
santam agriculture
Senwes
signa
SIGNIUM intelligence & intuition PREVIOUSLY TALENTAFRICA
SSK

Standard Bank
SRCC
SUIDWES
syngenta
TIGER BRANDS
TOTAL
THE CO-OP DIE KOOPERASIE
TWK agri
TOP LAY COUNTRY EGGS

vilko Agricultural Suppliers Since 1922
VinPro
NATURAL AND AGRICULTURAL SCIENCES NATUUR- EN LANDBOUWETENSKAPPE UFS·UV
VLEISSENTRAAL
vkb Agriculture (Pty) Ltd
VOERMOL
two a day
WILLISTON VLEISKOÖPERASIE BPK

BASF We create chemistry
unifrutti
westfalia fruit
SERNICK GROUP

For today…….

1. **Challenging and complex environment evolving**
2. Food Security and Competitiveness imperative
3. Engagement with President Ramaphosa and DPME
4. Wrap up

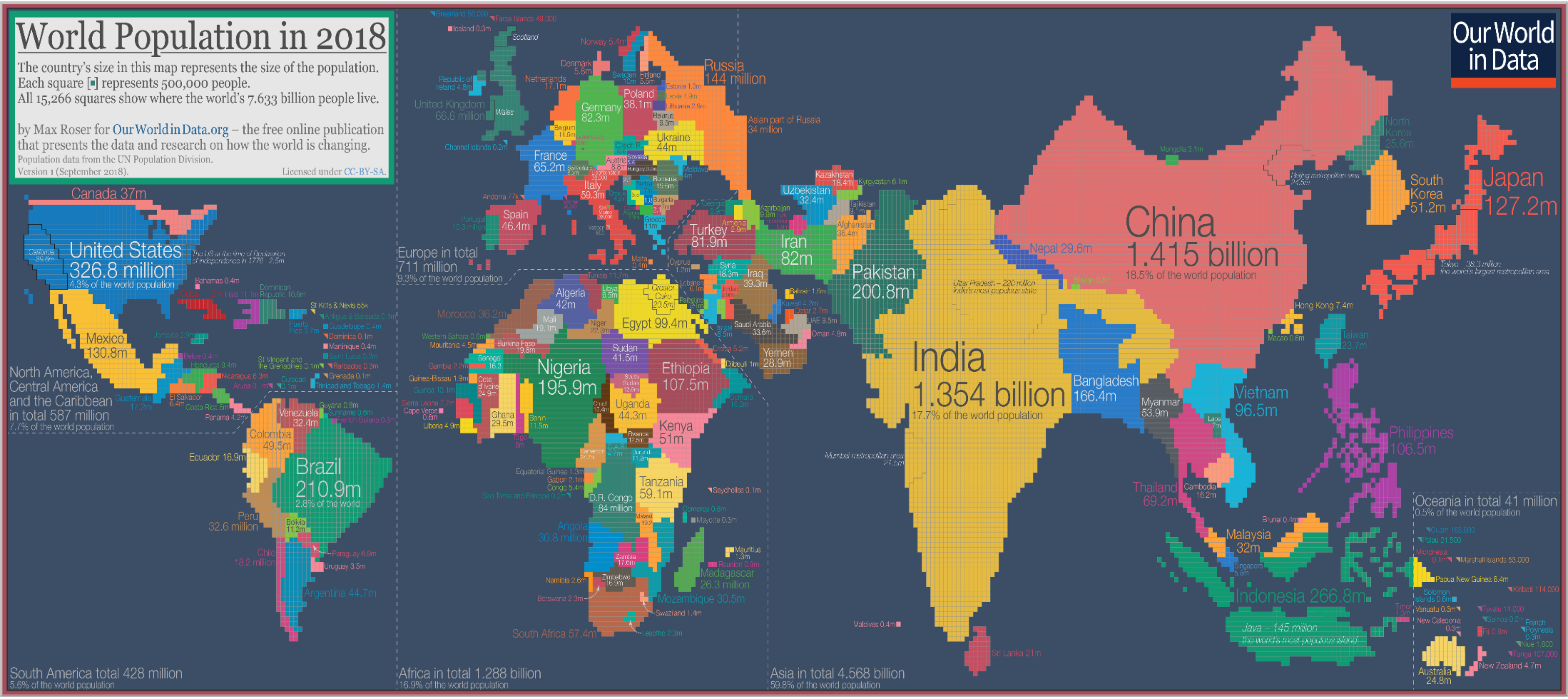
Challenging and complex environment evolving

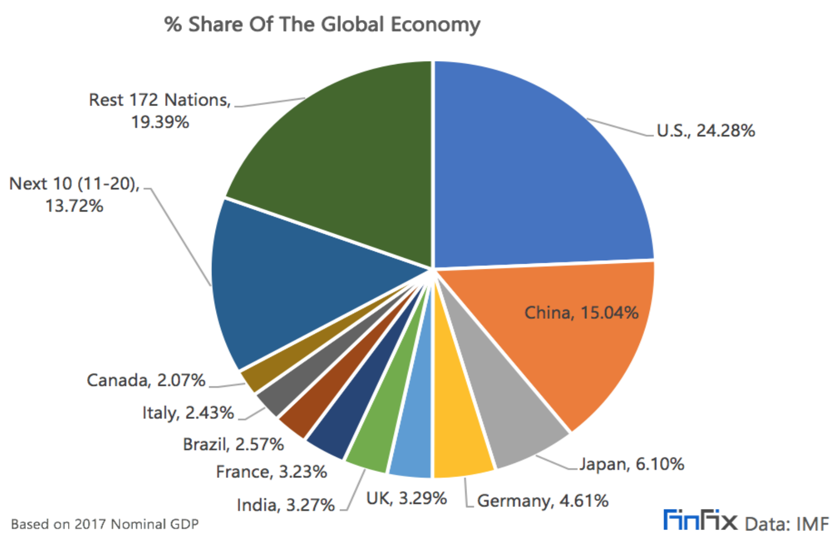
- **Global socio-political environment – a more uncertain world!**
- **Local socio-political environment – rollercoasting towards election**
- Consumer trends and activism – need to analyse facts, and act
- Technology dynamic – 4th Industrial Revolution: Jobs dynamic NB
- Climate Change – adaptation and mitigation: Weather variability?
- Increased regulation of agro-food system: Food safety, health, etc.
- Sustainable use of, and rights allocation to, water and land as critical natural resources – it will change: how to adapt?
- Utilisation of renewable energy sources – energy security
- "Trade wars are the wars of the future" – now fully with us
- Big Data – mine and analyse to drive efficiency
- Human capital and skills – the talent factor NB!

Global Socio-political Developments

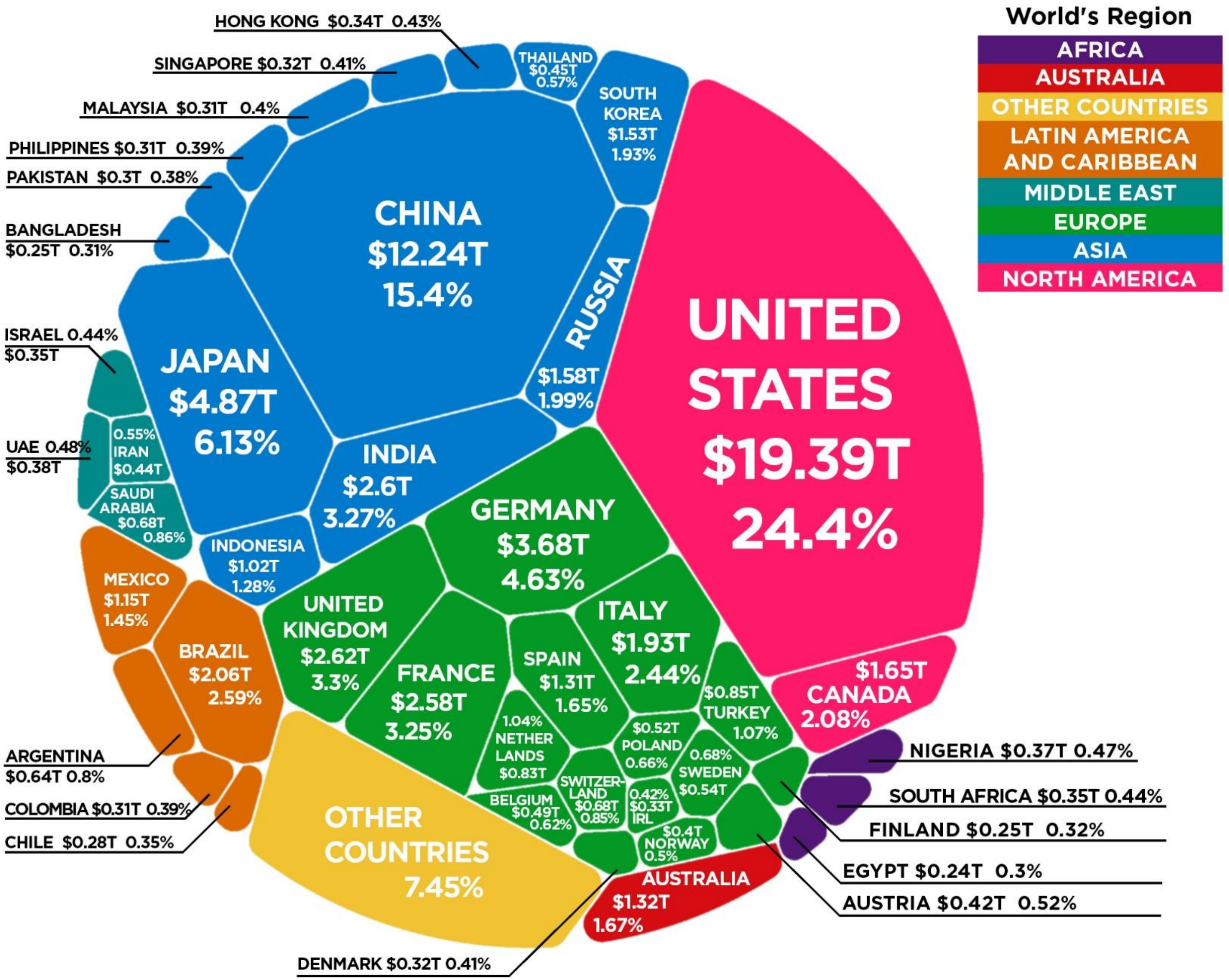
- Multi-polar global power dynamic – power shift to Asia (BRICS factor NB)
- Ambitions of China & Russia, also India & Japan: Geo-political positioning?
- Middle East catastrophe – migration effect to Europe and global destabilisation
- Religious fundamentalism still a factor, esp. in Africa (Boko Haram, Al Shabaab)
- Brexit and European Unity: major uncertainty remains, but also opportunity
- Donald Trump dynamic: USA nationalism and its impact
- **Global population & Africa's demographic 'dividend' and food insecurity**
- Globalisation and Interconnectivity still massive driver, despite protectionist efforts.

More interconnected → but greater uncertainty → less control → more risk → greater opportunity though → look for and exploit!





China and India = 36.2% of global population, but 18% of global GDP



Article and Sources:
https://howmuch.net/articles/the-world-economy-2017
http://databank.worldbank.org/data/download/GDP.pdf

howmuch.net

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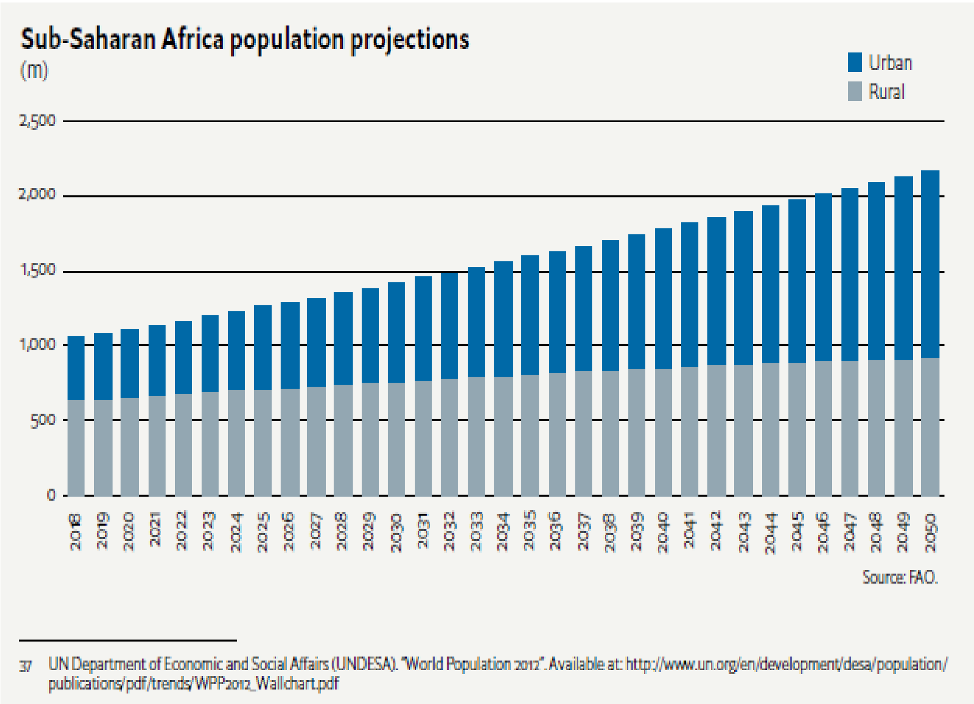
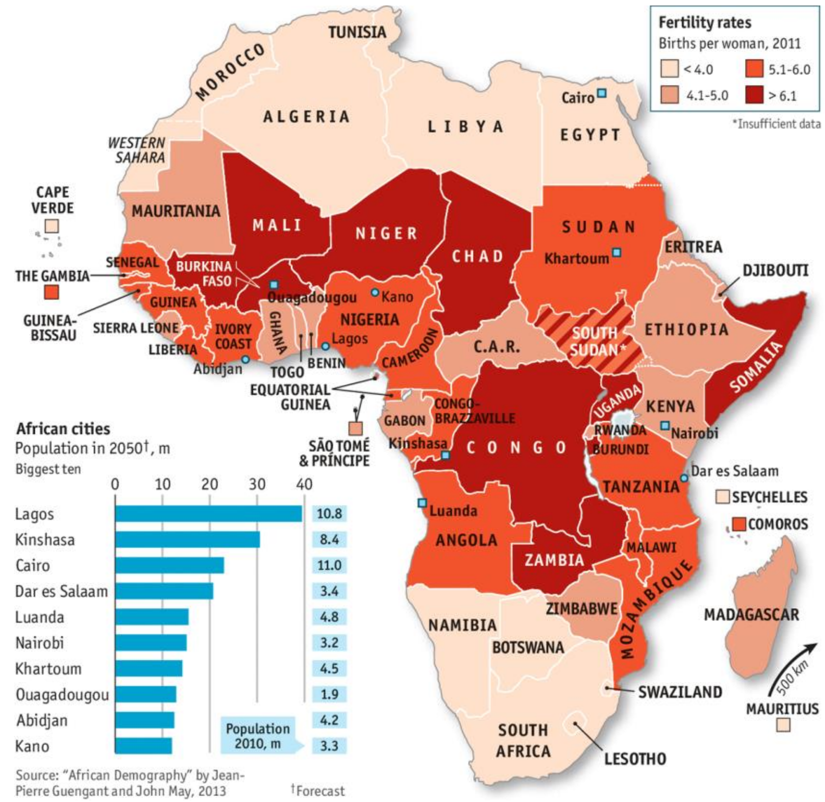
Urbanisation and Demographics.....





Either massive opportunity,
or a critical risk……!

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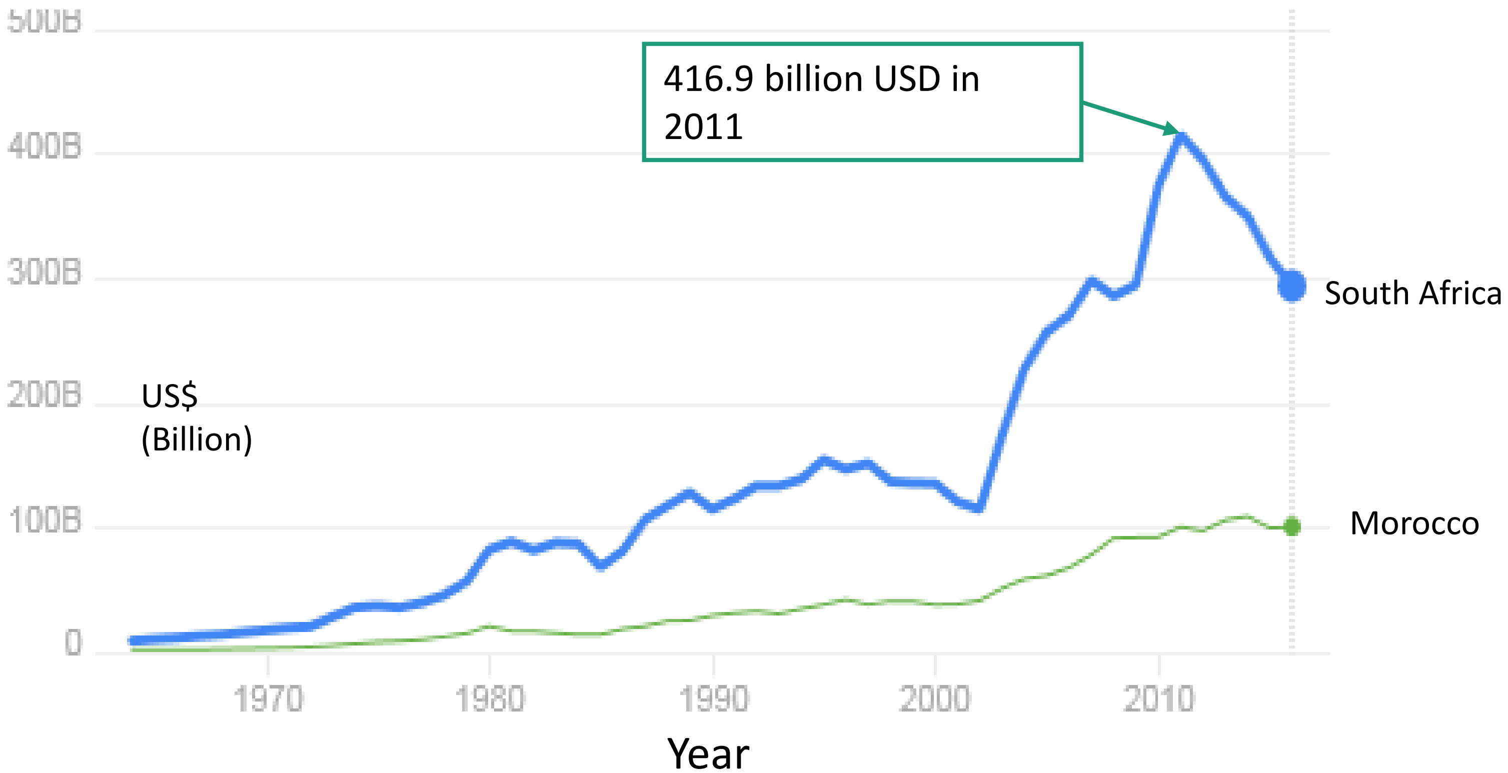
Local Socio-political Developments

- ANC still in turmoil – divisions and distrust persist. CR consolidation?
- DA & EFF no longer viable ruling coalitions – plenty own problems as well
- Critical general election ~May 2019 - realignment post 2019 possible?
- Major political uncertainty, but not necessarily all bad. Hope springs!
- **Biggest concern: Lack of GDP growth and Competitiveness decline (WEF)**
- Massive unemployment (~27%), especially amongst the Youth (>50%)
- Inequality – SA top of GINI Coefficient: populist calls & demands
- Land & water reform will be at the centre of demands. Also banks & mines.
- Crime & Security factor, including corruption and farm/rural safety concern.

South Africa's GDP: 294,8 billion USD (2016)
347,7 billion USD (2018)



2011 GDP per capita (US$) = 8,066

2016 GDP per capita (US$) = 5,261

2018 GDP per capita (US$) = 6,180

Source: WEF Competitiveness Reports

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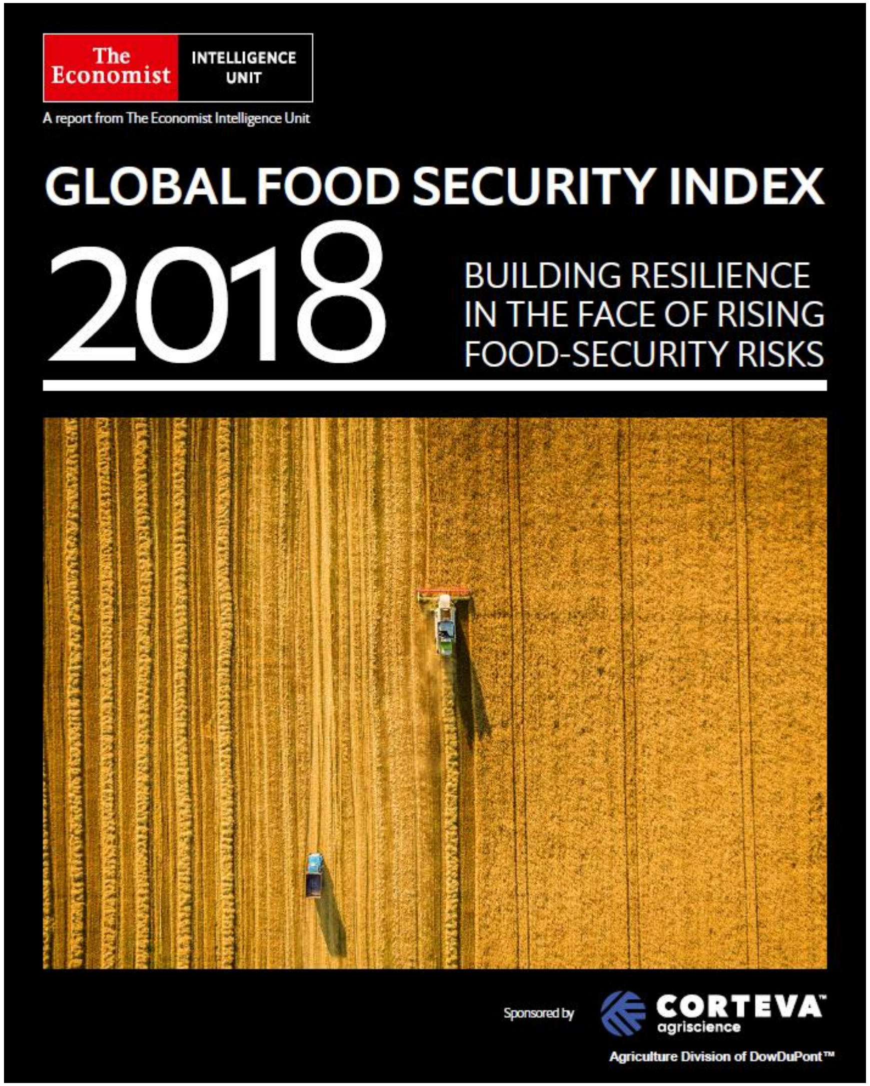
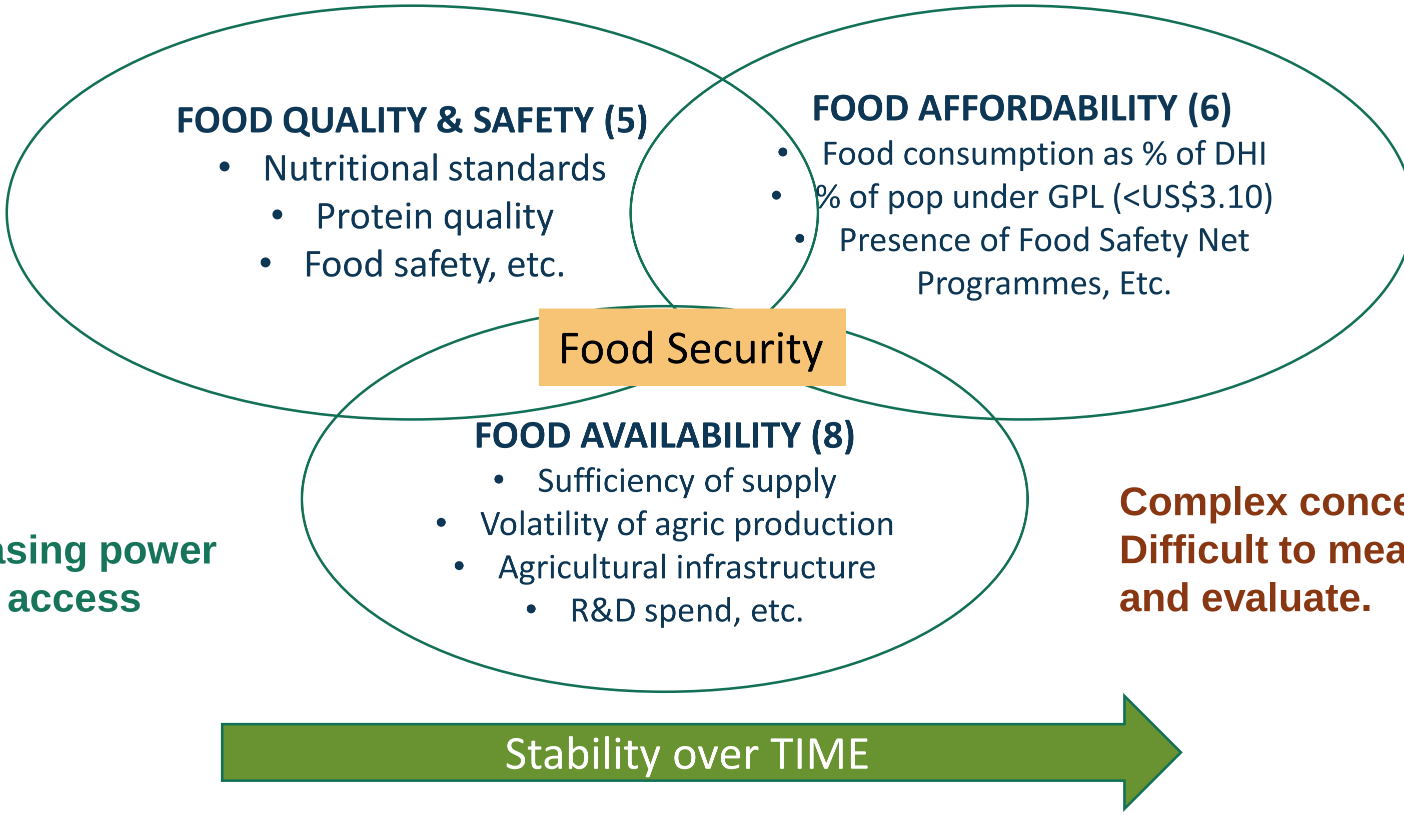
Food Security Imperative



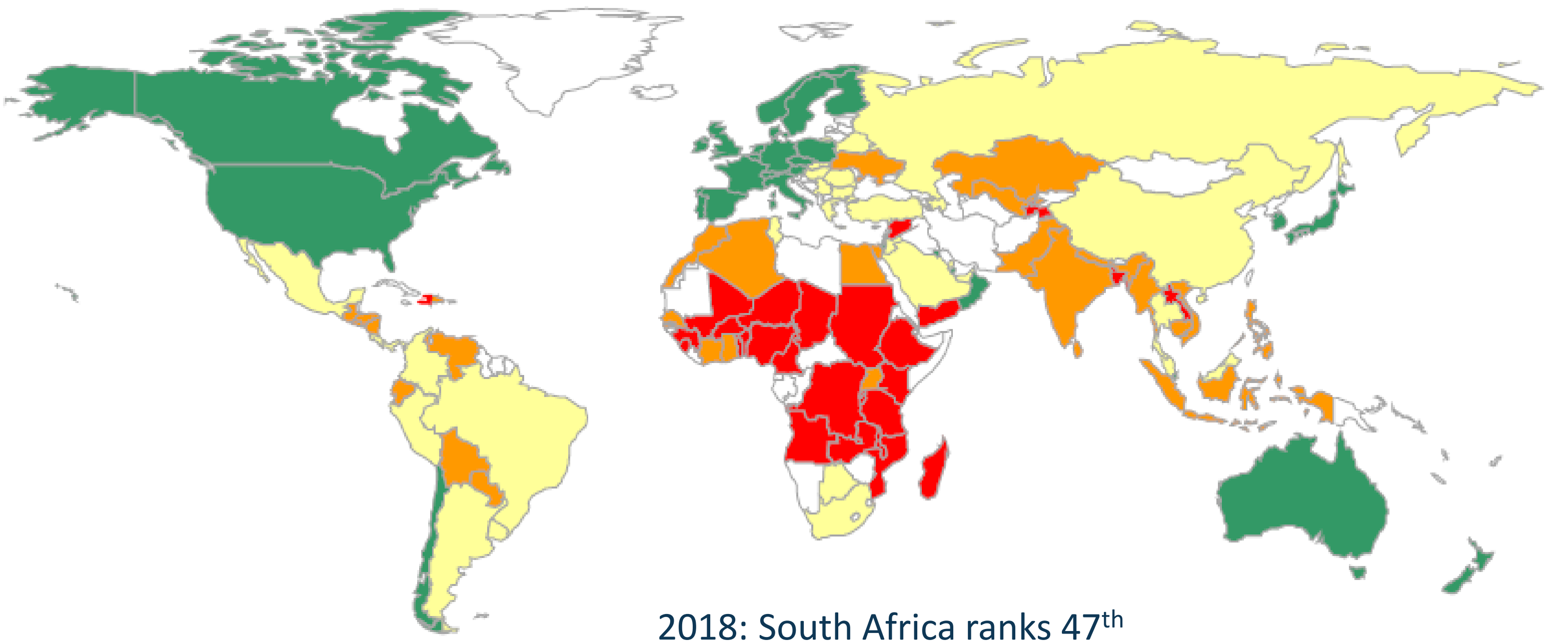
Components of Food Security



Purchasing power key to access

Complex concept: Difficult to measure and evaluate.

2017 Global Food Security Index



2018: South Africa ranks 47th

Score = Score in 2017, 0-100 where 100=best

Δ = Change in 2017 score compared with 2016

Green= score improved this year

Red = score deteriorated this year

VERY GOOD (TOP QUARTILE)		GOOD (3RD QUARTILE)		MODERATE (2ND QUARTILE)		WEAK (BOTTOM QUARTILE)	
Score	Δ	Score	Δ	Score	Δ	Score	Δ

SA Household Food Security a risk: ~20% of households food insecure

Source: Economist Intelligence Unit/DuPont

http://foodsecurityindex.eiu.com.

Competitiveness Imperative

WORLD ECONOMIC FORUM

COMMITTED TO IMPROVING THE STATE OF THE WORLD

Insight Report

The Global Competitiveness Report 2018

The Global Competitiveness Index 4.0 2018 Rankings

Covering 140 economies, the Global Competitiveness Index 4.0 measures national competitiveness—defined as the set of institutions, policies and factors that determine the level of productivity.

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Rank	Economy	Score[1]	Diff. from 2017[2] Rank	Diff. from 2017[2] Score
1	United States	85.6	—	+0.8
2	Singapore	83.5	—	+0.5
3	Germany	82.8	—	+0.2
4	Switzerland	82.6	—	+0.2
5	Japan	82.5	+3	+0.9
6	Netherlands	82.4	–1	+0.2
7	Hong Kong SAR	82.3	—	+0.3
8	United Kingdom	82.0	–2	–0.1
9	Sweden	81.7	—	+0.1
10	Denmark	80.6	+1	+0.7
11	Finland	80.3	+1	+0.5
12	Canada	79.9	–2	–0.1
13	Taiwan, China	79.3	—	+0.1
14	Australia	78.9	+1	+0.7
15	Korea, Rep.	78.8	+2	+0.8
16	Norway	78.2	–2	–0.8
17	France	78.0	+1	+0.6
18	New Zealand	77.5	–2	–0.6
19	Luxembourg	76.6	+3	+0.6
20	Israel	76.6	—	+0.4
21	Belgium	76.6	–2	—
22	Austria	76.3	–1	+0.2
23	Ireland	75.7	—	–0.3
24	Iceland	74.5	—	–0.1
25	Malaysia	74.4	+1	+1.1
26	Spain	74.2	–1	+0.4
27	United Arab Emirates	73.4	—	+1.1
28	China	72.6	—	+0.9
29	Czech Republic	71.2	—	+0.3
30	Qatar	71.0	+2	+0.6
31	Italy	70.8	—	+0.3
32	Estonia	70.8	–2	—
33	Chile	70.3	+1	+0.9
34	Portugal	70.2	–1	+0.5
35	Slovenia	69.6	—	+1.1
36	Malta	68.8	—	+0.3
37	Poland	68.2	—	+0.2
38	Thailand	67.5	+2	+1.3
39	Saudi Arabia	67.5	+2	+1.6
40	Lithuania	67.1	–2	+0.7
41	Slovak Republic	66.8	–2	+0.6
42	Latvia	66.2	—	+1.4
43	Russian Federation	65.6	+2	+1.7
44	Cyprus	65.6	–1	+0.9
45	Indonesia	64.9	+2	+1.4
46	Mexico	64.6	–2	+0.5
47	Oman	64.4	+14	+3.4
48	Hungary	64.3	—	+0.9
49	Mauritius	63.7	—	+0.8
50	Bahrain	63.6	–4	–0.2
51	Bulgaria	63.6	—	+1.2
52	Romania	63.5	—	+1.3
53	Uruguay	62.7	–3	—
54	Kuwait	62.1	+2	+0.5
55	Costa Rica	62.1	–1	+0.4
56	Philippines	62.1	+12	+2.3
57	Greece	62.1	–4	+0.3
58	India	62.0	+5	+1.2
59	Kazakhstan	61.8	—	+0.7
60	Colombia	61.6	–3	+0.1
61	Turkey	61.6	–3	+0.2
62	Brunei Darussalam	61.4	+2	+1
63	Peru	61.3	–3	+0.2
64	Panama	61.0	–9	[illegible]
65	Serbia	60.9	[illegible]	[illegible]
66	Georgia	60.9	[illegible]	[illegible]
67	South Africa	60.8	[illegible]	[illegible]
68	Croatia	60.1	[illegible]	[illegible]
69	Azerbaijan	60.0	[illegible]	[illegible]
70	Armenia	59.9	+2	[illegible]
71	Montenegro	59.6	+2	+1.4
72	Brazil	59.5	–3	–0.2
73	Jordan	59.3	–2	+0.1
74	Seychelles	58.5	+10	+3.3
75	Morocco	58.5	+2	+0.8
76	Albania	58.1	+4	+0.8
77	Viet Nam	58.1	–3	+0.1
78	Trinidad and Tobago	57.9	–2	+0.1
79	Jamaica	57.9	–1	+0.5
80	Lebanon	57.7	–5	–0.1
81	Argentina	57.5	–2	+0.1
82	Dominican Republic	57.4	—	+1.8
83	Ukraine	57.0	+6	+3.1
84	Macedonia, FYR	56.6	n/a	n/a
85	Sri Lanka	56.0	–4	–0.4
86	Ecuador	55.8	–3	+0.4
87	Tunisia	55.6	–1	+1
88	Moldova	55.5	–1	+0.9
89	Iran, Islamic Rep.	54.9	–1	+0.4
90	Botswana	54.5	–5	–0.5
91	Bosnia and Herzegovina	54.2	–1	+0.3
92	Algeria	53.8	—	+0.3
93	Kenya	53.7	—	+0.4
94	Egypt	53.6	—	+0.4
95	Paraguay	53.4	+1	+0.5
96	Guatemala	53.4	–5	–0.1
97	Kyrgyz Republic	53.0	+3	+1.1
98	El Salvador	52.8	—	+0.4
99	Mongolia	52.7	–4	–0.2
100	Namibia	52.7	–1	+0.3
101	Honduras	52.5	+2	+1.2
102	Tajikistan	52.2	–5	–0.6
103	Bangladesh	52.1	–1	+0.7
104	Nicaragua	51.5	–3	—
105	Bolivia	51.4	n/a	n/a
106	Ghana	51.3	–2	+1.4
107	Pakistan	51.1	–1	+1.3
108	Rwanda	50.9	–1	+1.3
109	Nepal	50.8	–1	+1.3
110	Cambodia	50.2	–1	+0.8
111	Cape Verde	50.2	–6	+0.4
112	Lao PDR	49.3	–2	+0.7
[illegible]	[illegible]	49.0	–2	+0.6
[illegible]	[illegible]	47.6	n/a	n/a
[illegible]	[illegible]	47.5	–3	–0.5
116	Tanzania	47.2	–2	+0.8
117	Uganda	46.8	–4	–0.2
118	Zambia	46.1	–3	+0.6
119	Gambia, The	45.5	—	+0.8
120	Eswatini	45.3	–4	+0.2
121	Cameroon	45.1	–3	+0.2
122	Ethiopia	44.5	–2	+0.6
123	Benin	44.4	–1	+0.8
124	Burkina Faso	43.9	n/a	n/a
125	Mali	43.6	–4	–0.1
126	Guinea	43.2	–3	+0.3
127	Venezuela	43.2	–10	–1.9
128	Zimbabwe	42.6	–4	+0.6
129	Malawi	42.4	—	+1.8
130	Lesotho	42.3	–4	+0.9
131	Mauritania	40.8	–3	+0.1
132	Liberia	40.5	–2	+0.6
133	Mozambique	39.8	–8	–2.1
134	Sierra Leone	38.8	–3	+0.1
135	Congo, Democratic Rep.	38.2	–8	–2.6
136	Burundi	37.5	–4	–1.0
137	Angola	37.1	n/a	n/a
138	Haiti	36.5	–5	+0.7
139	Yemen	36.4	–4	+0.9
140	Chad	35.5	–6	—

South Africa

Selected contextual indicators

Population millions	56.5
GDP per capita US$	6,179.9
10-year average annual GDP growth %	1.7
GDP (PPP) % world GDP	0.60
Unemployment rate %	27.3
5-year average FDI inward flow % GDP	1.1

2016 = 47th
2017 = 61st
2018 = 67th

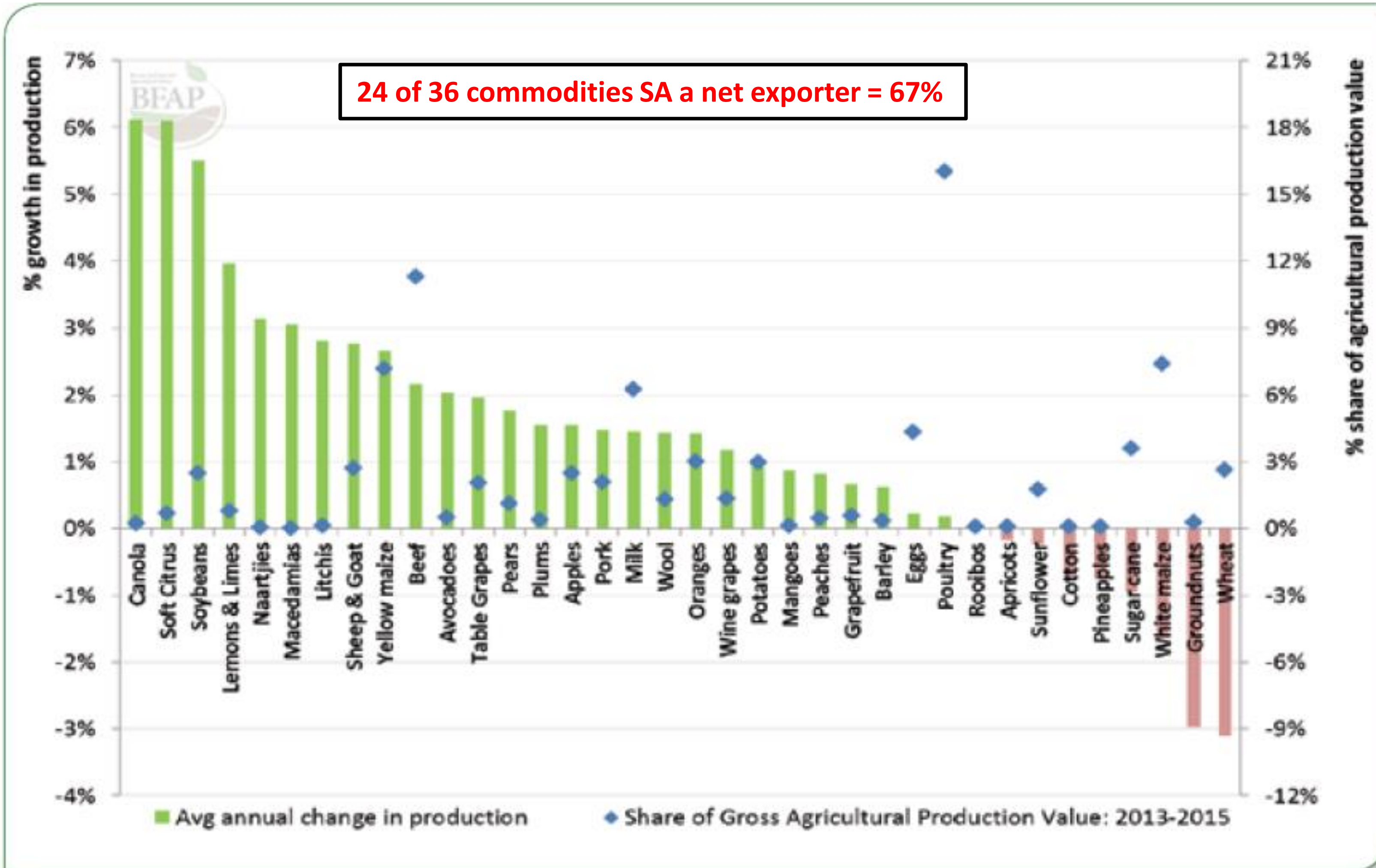
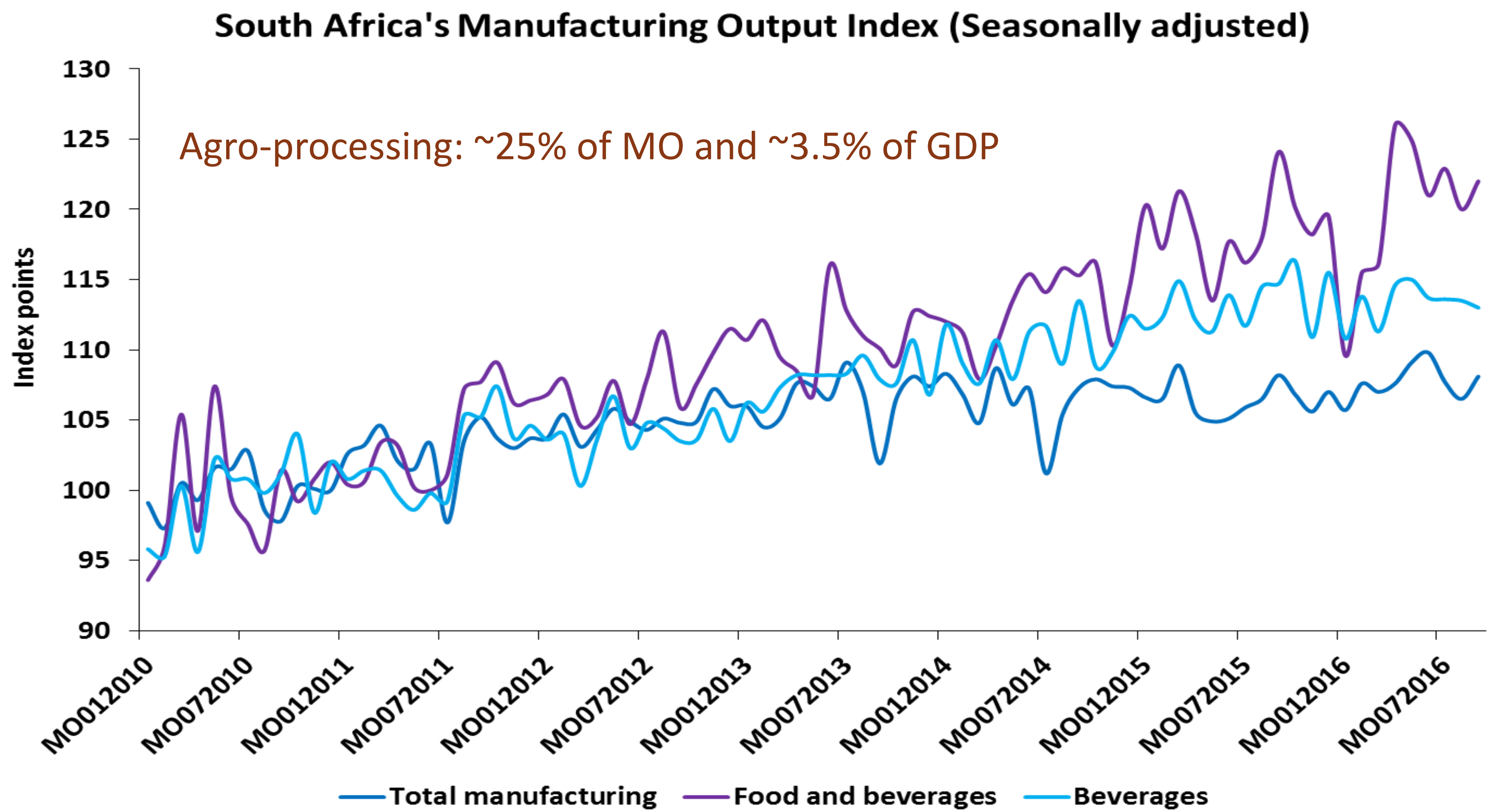


Figure 2: Agricultural performance: growth in production (2011-2015) and share of agricultural production value of selected industries (2013-2015)

Source: BFAP, 2016

Indexed GDP: Agro-processing vs Manufacturing Output



Source: Stats SA, Agbiz Research

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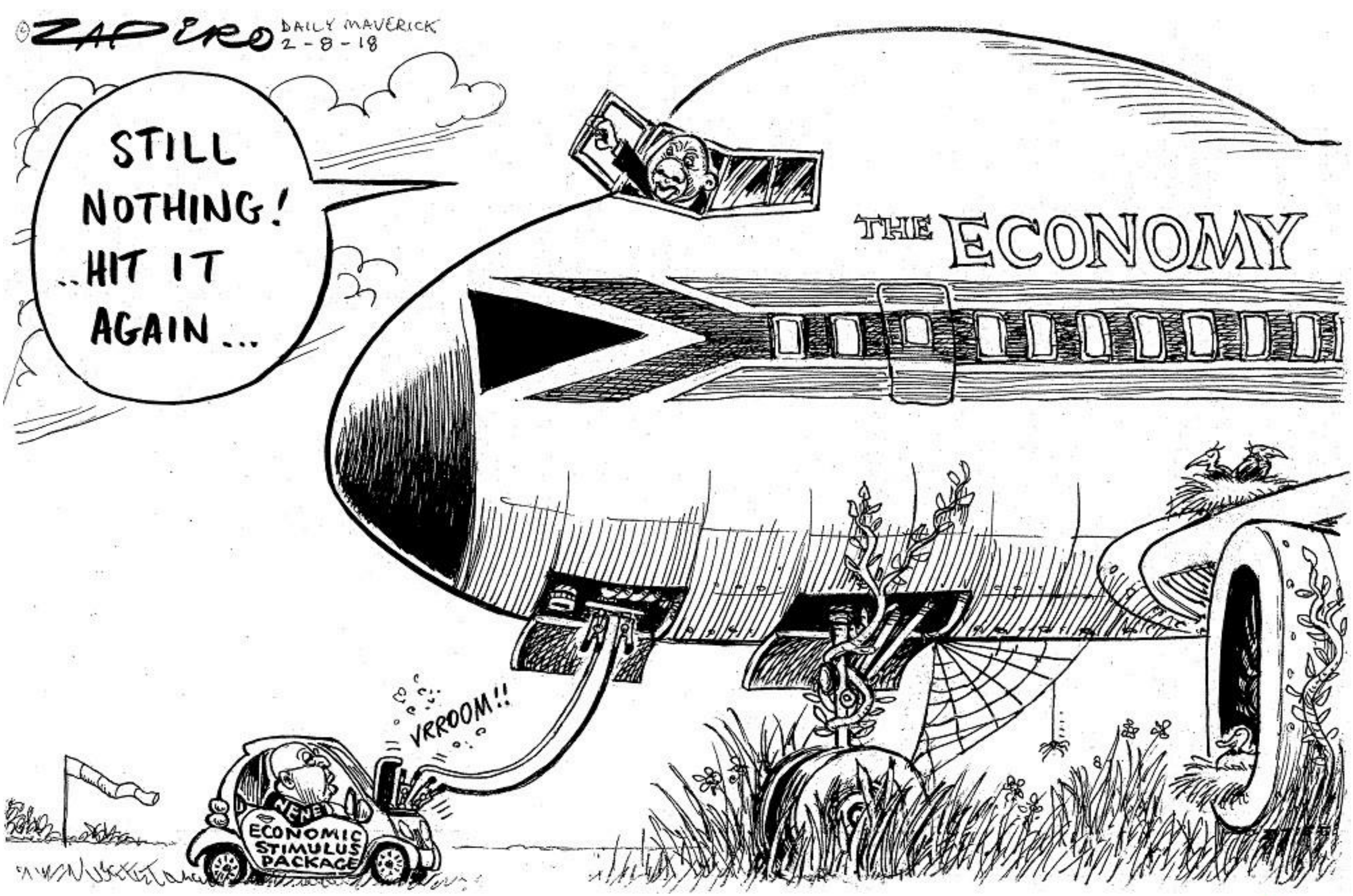
Way forward………

1. Engagement with President Ramaphosa (21 August 2018) and Min Dlamini-Zuma (DPME). Again 27 November 2018.

2. Jobs Summit (Nedlac process)

3. Investment Summit

4. Stimulus package


©ZAPIRO DAILY MAVERICK 2-8-18
STILL NOTHING! ..HIT IT AGAIN...
THE ECONOMY
VRROOM!!
NENE
ECONOMIC STIMULUS PACKAGE

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Major policy and regulatory uncertainty issues

1. **Credit legislation, with specific reference to problems with the National Credit Act:**
   - Affordability assessment criteria contained in Regulation 23A to the NCA
   - The template for reporting credit information in terms of Regulation 19(13) of the NCA
   - The new, compulsory disability cover requirement as part of the credit life insurance requirement;
2. **Climate change mitigation framework**
   - Carbon Tax Bill
   - Climate Change Bill
3. **Water rights:**
   - Regulations to the National Water Act prescribing the procedure to apply for a water licence
   - Water and Sanitation Master Plan and water sector transformation
4. **Land reform:**
   - **Expropriation without Compensation**
   - Regulation of Agricultural Landholdings Bill
   - Draft Property Valuation Regulations (Property Valuation Act)
   - Communal Land Tenure Bill
   - Communal Property Association Amendment Bill
   - Preservation & Development of Agricultural Land Framework Bill
   - PLAS
   - State land lease & disposal policy
   - Agriparks
   - Land Audit (e-cadastre)

Major policy and regulatory uncertainty issues (Cont.)

5. **Environmental legislation**
   - EIA regulations to the NEMA
   - Listing of certain aquaculture and wildlife ranching species in draft NEMBA AIS Regulations
   - Definition of prescribed 'control methods' in the draft NEMLA.

6. **Agricultural, agribusiness sustainability**
   - Biosecurity (Plant & Animal Health)
   - Trade environment (demand-side management) (Trust between Govt & PrivateSector)
   - Aquaculture Bill
   - Tariff policy, and specifically tariff regime with wheat and sugar, including SADC-EPA wheat quota issue and BLNS Rebate issue
   - Renewal of Crop Estimate Consortium Contract (Administrative issue)
   - Levying of testing fees under the Agricultural Products Standards Act (APSA)
   - SME participation
   - Actions to unblock rural & urban infrastructure constraints, including financing
   - Skills and 4th Industrial Revolution

Needs & requirements from Industry

- **Policy certainty, an enabling regulatory environment, government service delivery & registration** (information included), especially as relates to:

  - Land
  - Water
  - Demand-side management & market access, incl. PTA/FTA trade agreements with major ME and Asian countries, etc.
  - Ensuring transparent and credible local markets run by private sector
- **Infrastructure maintenance and development** (unblock constraints):

  - Energy, incl. electricity, PV, transport fuel, waste management, etc.
  - Water & sanitation
  - Logistics (Road, Rail and Ports)
  - IT (IoT) Telecommunications, precision farming, EO, etc.
- **Development finance and insurance**, including Land Bank's mandate & role
- **Skills development** – many facets
- Exclude agriculture/agribusiness from **Carbon Tax legislation**
- Food Control Agency (Food safety NB)

Needs & requirements from Industry (Cont.)

- **Smallholder and developing farmer support for commercialization**

  - access to finance (Development Finance Agency)

  - access to markets (totally revisit current Agriparks model – be market-driven)

  - access to technology & training

  - access to infrastructure

  - access to resources (title deed, tradeable lease or any tenure security model that can attract finance)

  - Identify scale neutral commodities/products for development purposes

  - Develop **partnerships** with private sector/agribusinesses to ensure aggregation models are feasible and sustainable

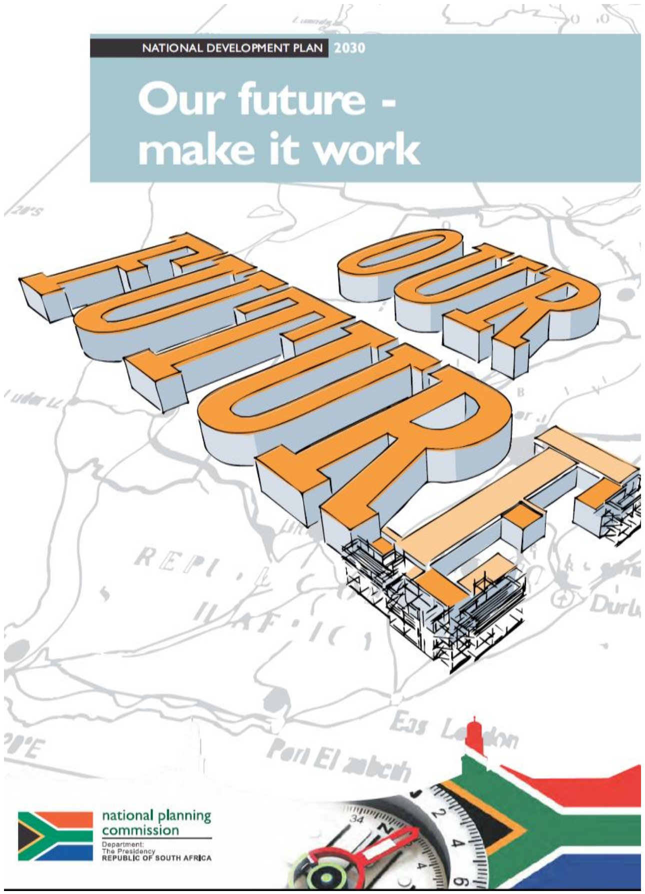
Proposed Growth and Development Plan for South African Agriculture and Agribusiness

Meeting with Minister Nkosazana Dlamini-Zuma, DPME

John Purchase, Jannie de Villiers & Omri van Zyl

21 September 2018

Take our cue from National Development Plan



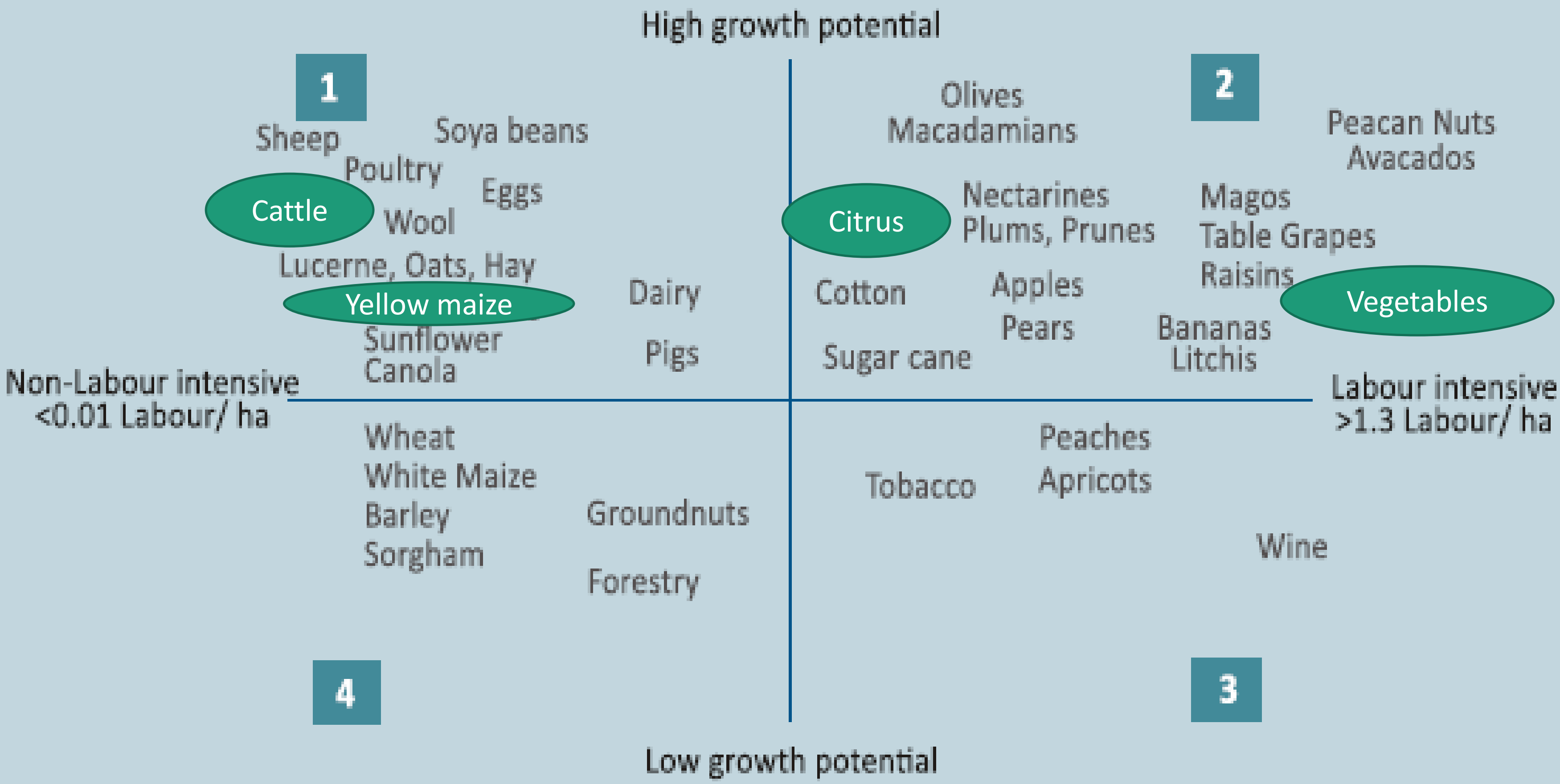
CHAPTER SIX

An integrated and inclusive rural economy

KEY POINTS

- Rural communities require greater social, economic and political opportunities to overcome poverty.
- To achieve this, agricultural development should introduce a land-reform and job-creation/livelihood strategy that ensures rural communities have jobs.
- Ensure quality access to basic services, health care, education and food security
- Plans for rural towns should be tailor-made according to the varying opportunities in each area. Intergovernmental relations should be addressed to improve rural governance.

FIG 6.3 AGRICULTURAL GROWTH AND EMPLOYMENT POTENTIAL



Source: Bureau for Agricultural Policy, 2011[5]

FIG 6.1 THE EMPLOYMENT CREATION POTENTIAL OF SOUTH AFRICAN AGRICULTURE

Target group	Primary jobs created	Secondary jobs created	Assumption
Subsistence farmers with <0.5 hectares	83 000	41 500	The livelihoods of one in 10 of the farmers in this category are improved.
Small-scale farmers with between 0.5 and 5 hectares of land	165 000	82 500	The livelihoods of half the farmers in this category are improved.
Small-scale farmers with >5 hectares of land	75 000	37 500	These farmers employ themselves and two others.
Better use of redistributed land	70 000	35 000	Redistribution beneficiaries employ themselves and two others; one in 10 restitution beneficiaries become self-sufficient.
Labour-intensive winners	200 000	100 000	Critically, this requires investment in irrigation, support to smallholder farmers and their ability to grow their businesses.
Labour-extensive field crops	10 000	5 000	This reflects a "high road" or optimistic scenario and assumes that the current decline in employment in commercial farming is halted.
Labour-extensive livestock	40 000	25 000	This reflects a "high road" or optimistic scenario and assumes that the current decline in employment in commercial farming is halted.
Total	**643 000**	**326 500**	**969 500**

Note: The employment multiplier between agriculture and its upstream and downstream industries has been taken at a conservative estimate of 0.5 for small-scale farmers.

Many plans:

- National Development Plan
- New Growth Path (Not Agriculture specific)
- Integrated Growth and Development Plan (IGDP) of DAFF
- Agricultural Policy Action Plan (APAP) of DAFF
- Operation Phakisa (Agriculture, Land Reform and Rural Development)
- DAFF Strategic Plan 2015/16 – 2019/20

Need proper PPP Implementation Plan

+ PPP M&E structure

Imperatives for SA Growth Plan for Agriculture/Agribusiness

Cross cutting imperatives:

- *Conducive and enabling investment environment;*
- *Inclusive economic growth and development;*
- *Open, competitive market-driven system;*
- *Market access and demand-side management*
- *Commercial and development finance;*
- *Producer support systems (Esp. rural communities);*
- *HR capacity development (Govt services)*
- *Labour matters;*
- *Infrastructure, including rural development investment,;*
- *Sustainable use of natural resources & biodiversity and ecosystems;*
- *Sustainable Land Reform*
- *Sustainable Water Reform*
- *Rural safety*

Indicators NB

Imperative of Competitive Value Chains

- *Poultry industry*

  - Broiler production

  - Egg production
- *Red meat,*
- *dairy*
- *Wool & Mohair*
- *Grain and oilseed industries*
- *Fruit industries*
- *Vegetable industries*
- *Beverage industries*
- *Industrial crops (Sugar, cotton, etc.)*
- *Others (CGCSA, AFASA, AgriSA, NAFU, TLUSA)*

PARTNERSHIPS & GOVERNANCE CRITICAL

Organised Agriculture's 5 year plan to revive the economy
and develop more Black Farmers in South Africa

NDP GOALS

1. 1 Million jobs
2. 500 000 ha under irrigation
3. Underused land in communal areas
4. Value chain approach to job creation

CURRENT STATE

Agriculture's Contribution to GDP

2.4 % Primary
± 12.6 % Secondary

± 15 %

GOAL

1. **Primary + Secondary = 20% to GDP**
2. Agrarian Transformation
3. "Agri Singapore of Africa"

DEVELOPMENT COMPONENT

A Agricultural Development Fund (DAFF, DRDLR)

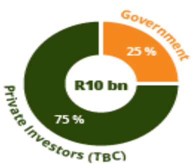
Finance

Principles of the ADF

- Blended finance model (grant funding & private equity fund)
- Farmers want: finance at discounted rate, access to a production loan, access to subsidised interest rates.
- Based on the partnership principle
- Incentivise farmers to invest (tax incentives, Agri BBBEE)
- A value chain approach to development

The ADF leverage model

Proposed Proportional Contribution



Implementation

Public Private Partnership

- Producer Support
- Extension Services
- Research & Development
- Advisory Services
- Genetics
- Technology

Agri Value Chain

- 28 000 Farmers
- 30 Commodities
- > 100 Agri Companies

Facilitate Trade (DTI)

ATF | SPS | PPECB | FTA | PTA

B Beneficiaries (DRDLR)

1. Communal Areas

± 17 million ha

Commodity Focused Approached
± 2,5 million people could benefit

2. Existing Land Reform Projects
3. Current Projects (Mega and small)
4. Partnerships

C Demand Led Market Development

1. International new market access and existing market development
2. Focus on high value commodities and commodity specific market growth e.g livestock, grain, wool

COMMERCIAL COMPONENT

A Demand Led Market Development

C Local & International Investment in Sector Focus

Singapore Concept

B Policy Certainty

- Secure Property Rights (EWC + market related compensation)
- Tax Incentives
- Regulatory Streamlining

=

OUTCOMES

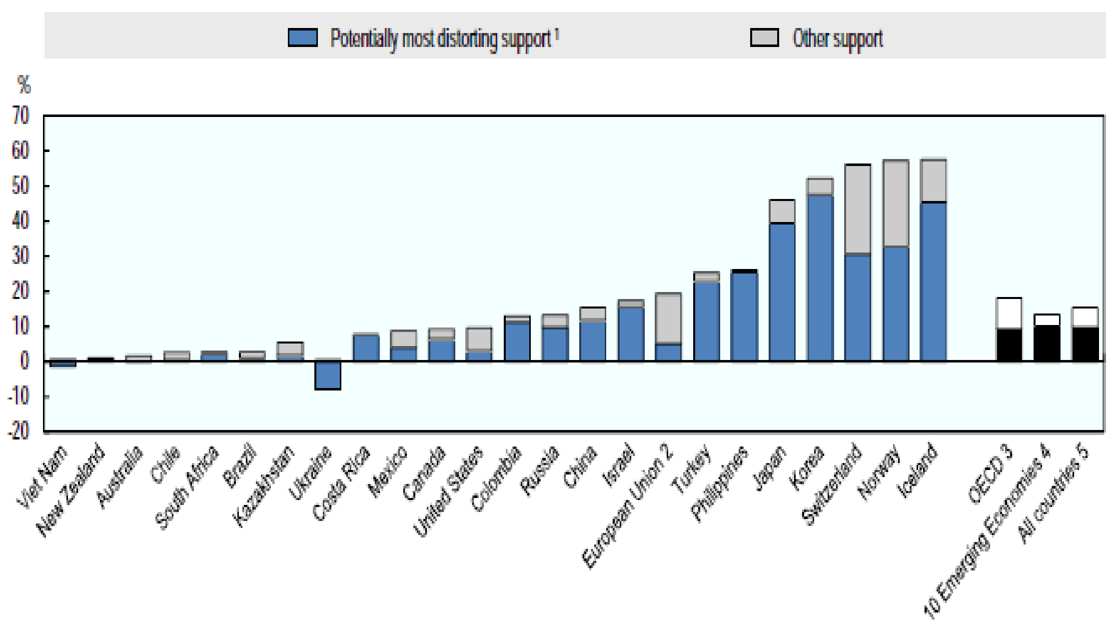
- Food Security
- Job Growth
- Transformation
- Household Income
- Sector Investment
- Etc.

agbiz

South Africa’s Producer Support Estimate (PSE) is not competitive.

Figure 1.8. Composition of the Producer Support Estimate by country, 2015-17

Percentage of gross farm receipts



Source : OECD (2018)

1. Grant-based programmes have limited reach: Producer Support Estimate declined from 0,26% to 0,14% of GDP in 2016. Comparatively speaking South Africa remains at a disadvantage with EU at 0,61%; Brazil (0,42%); China (1,91%) and Russia (0.94%).
2. Only 11,1% of the households involved in agriculture reported getting agricultural-related support from the government. Nationally, slightly more than two per cent (2,2%) of the households reported receiving training and 7,0% received dipping/ livestock vaccination services (GHS, StatsSA, 2016)
3. Market and wealth concentration. SMMEs including smallholder farmers are not favoured by the market. Poor access to financial and efficient business support services.

MORE IS NEEDED TO SUPPORT SOUTH AFRICAN PRODUCERS

For today…….

1. Challenging and complex environment evolving
2. Food Security and Competitiveness imperative
3. Engagement with President Ramaphosa and DPME
4. **Wrap up**

Wrap up…….

1. Business Confidence in the Agricultural Sector and Opportunities for Growth – Wandile Sihlobo
2. Challenges and changes in the Policy and Legislative Environment – Theo Boshoff
3. BFAP 2018 Baseline: Investment environment and Commodities Outlook – Prof Ferdi Meyer

Our Goal:

Empower you with the best information and intelligence possible!

Thank you