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# Land Reform: Foresight – preparing for certainties and uncertainties

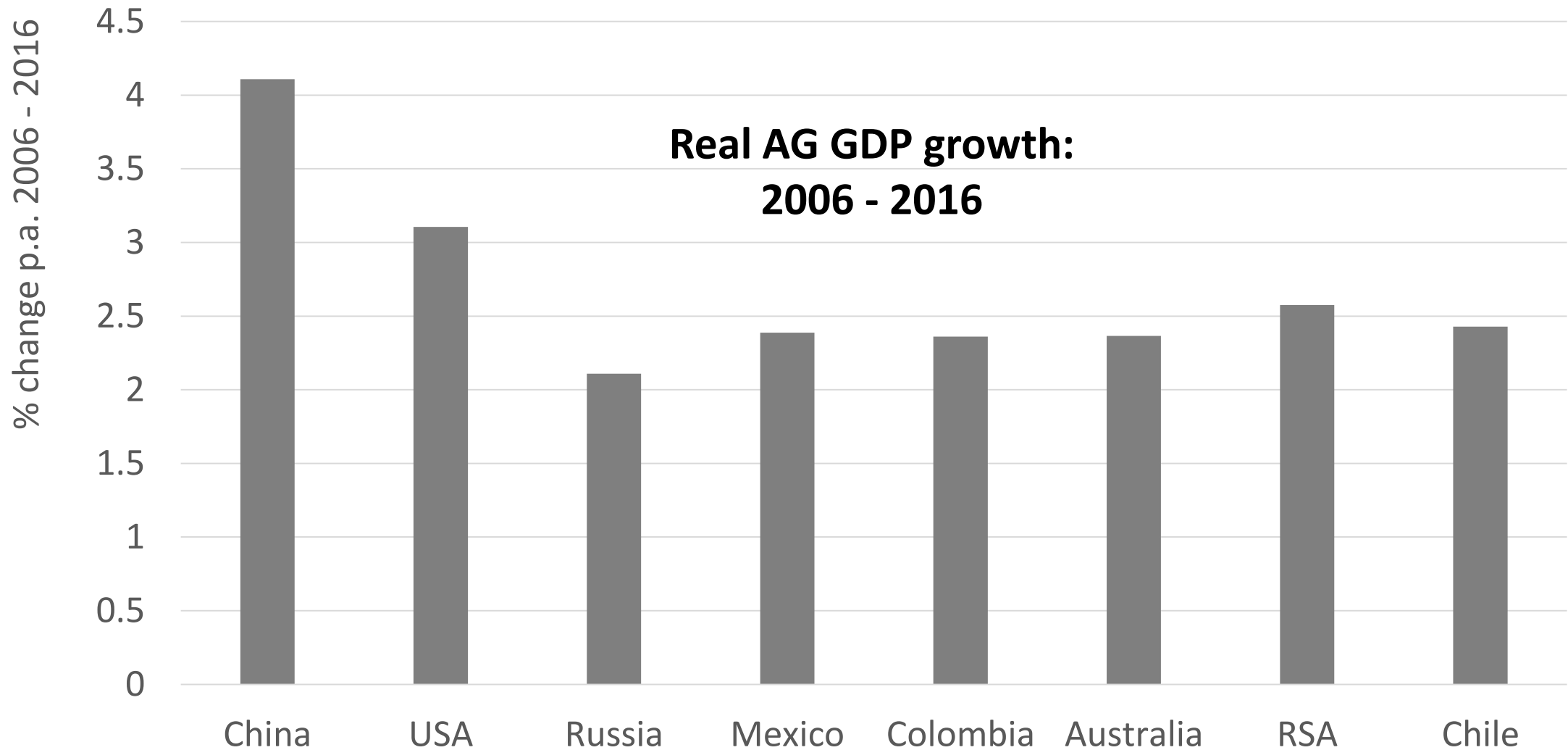
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Prof Ferdi Meyer

Mail & Guardian  
28 March 2019, Johannesburg

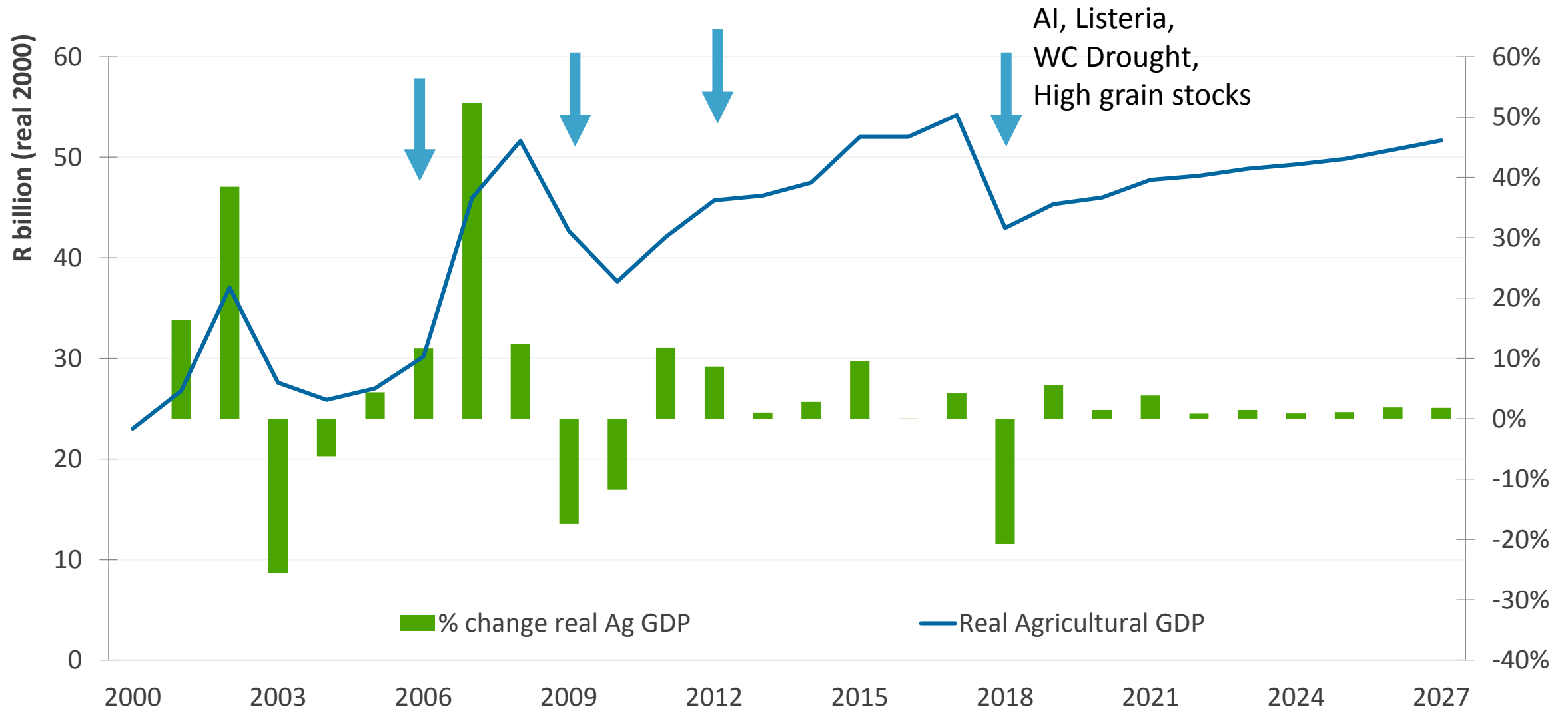
University of Pretoria  
&  
Bureau for Food and Agricultural Policy

# SA's performance in the global economy

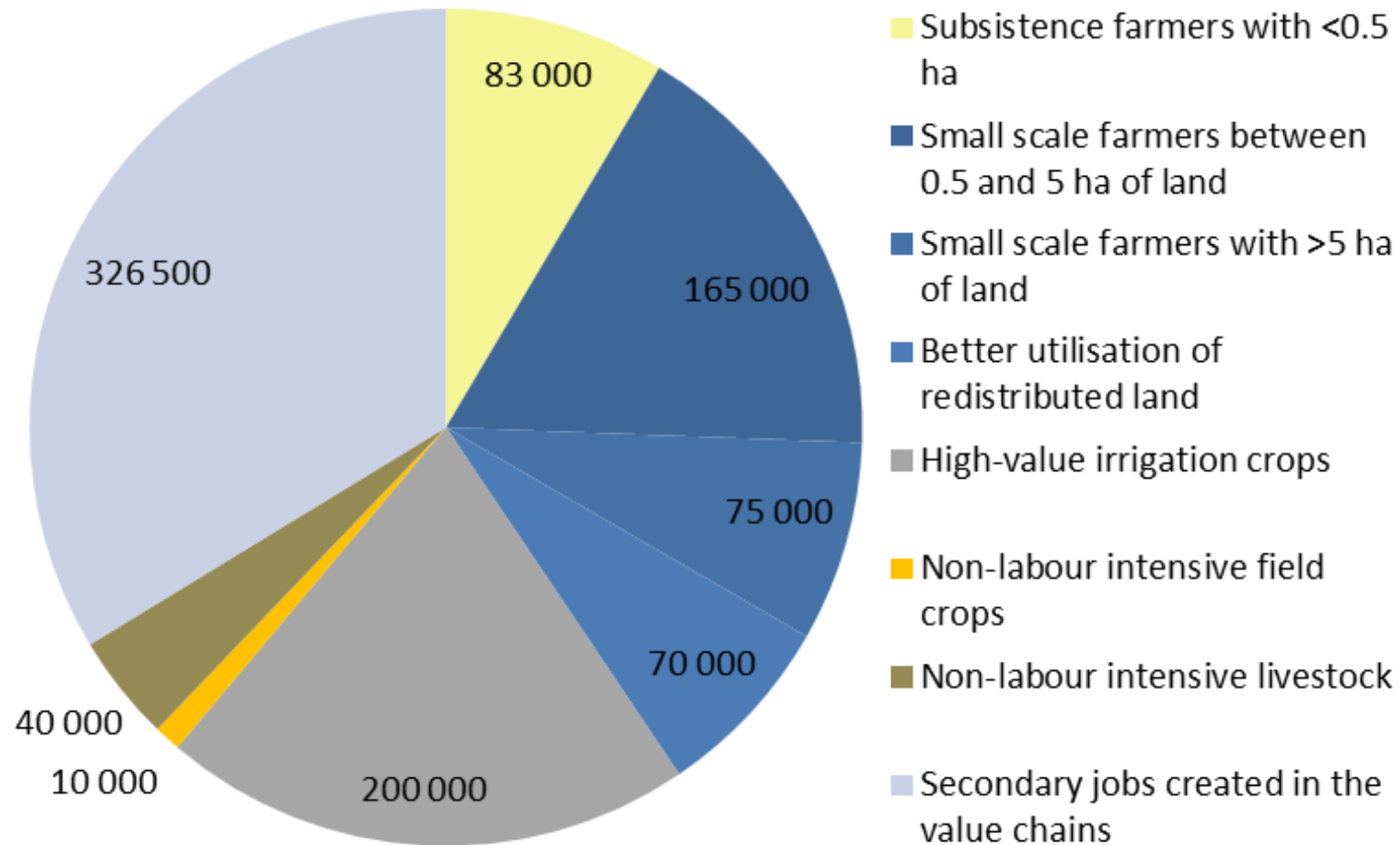


BFAP Baseline 2018

# Agricultural GDP in South Africa



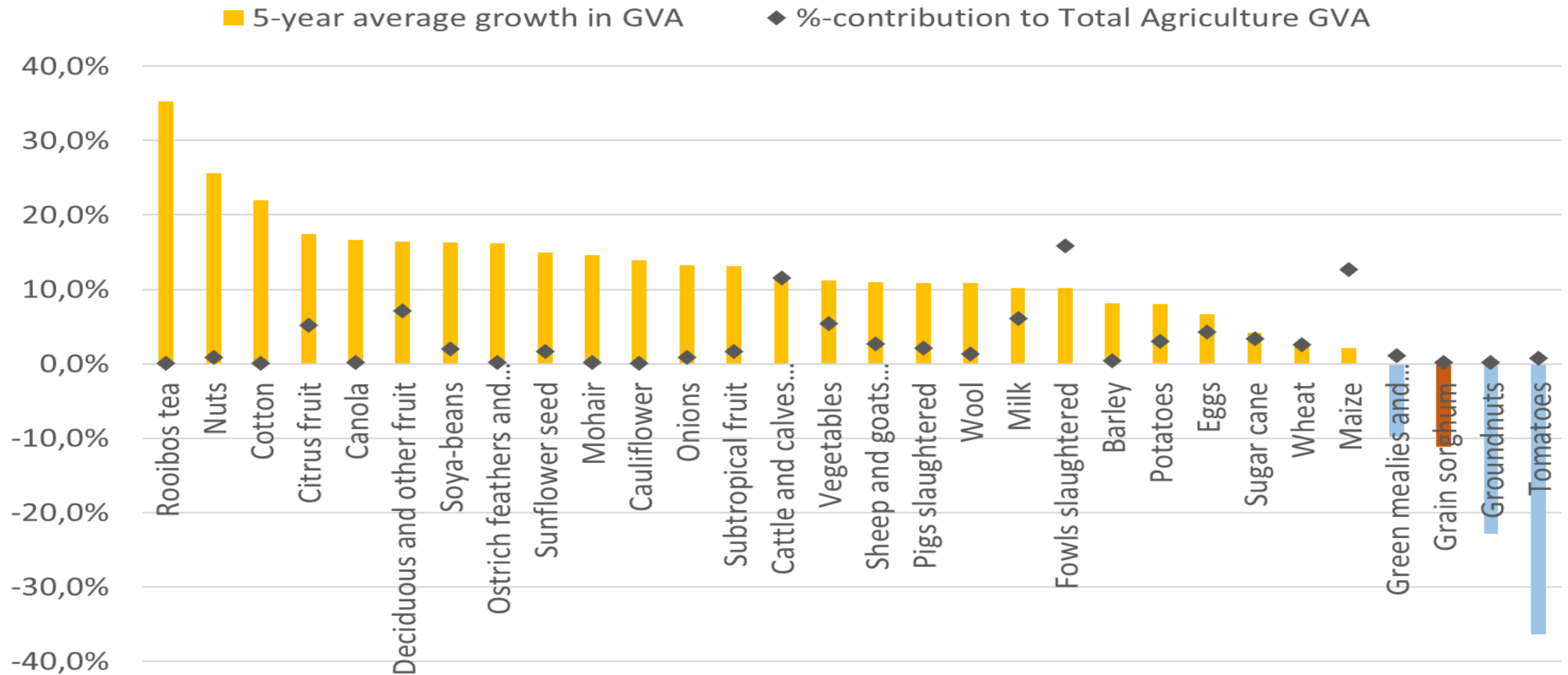
# NDP targets – Score sheet



**Irrigation expansion of 142 000 ha NOT 500 000 ha**

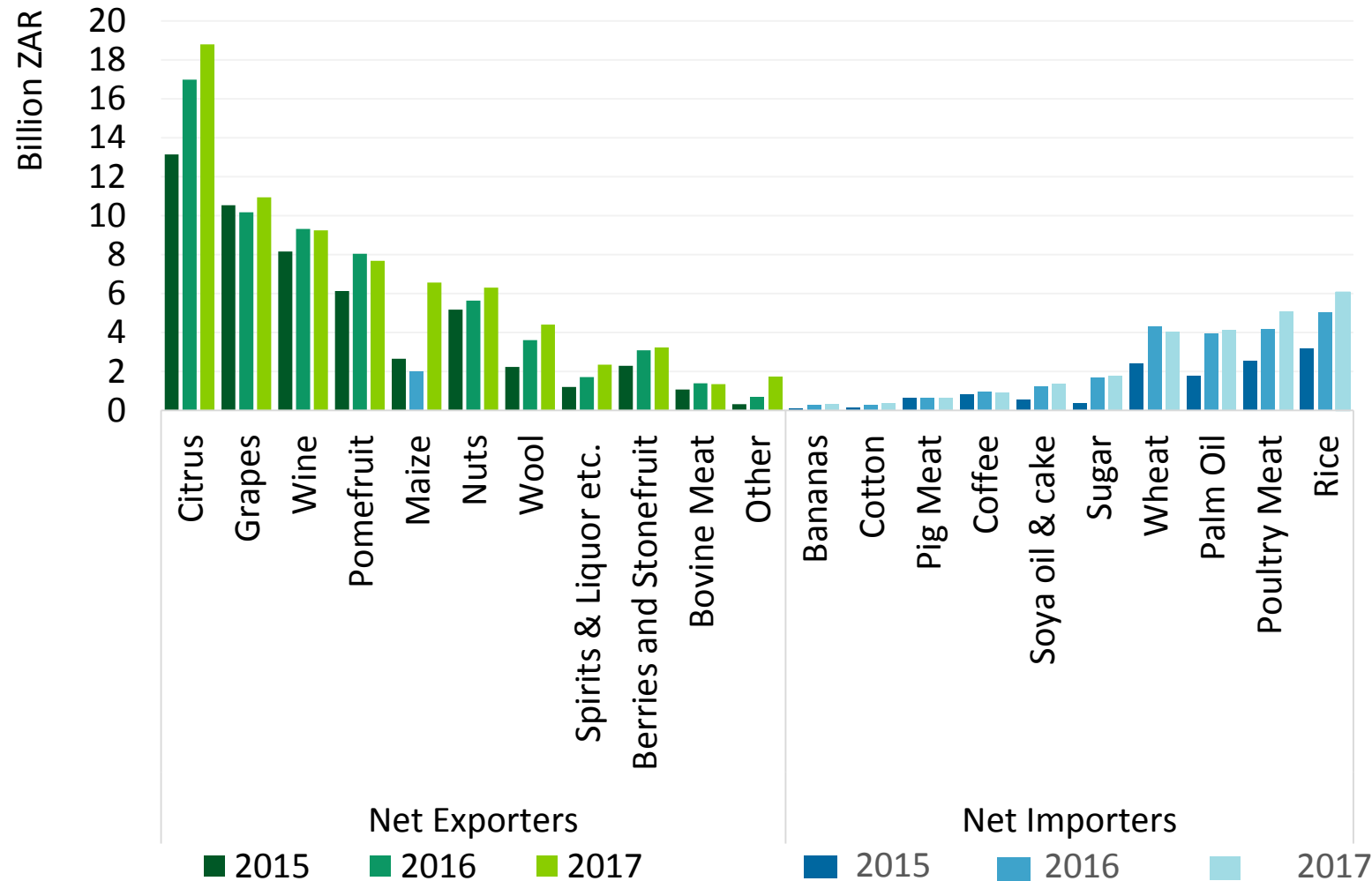
NDP Target	Indicator
Land reform	No
Jobs & growth: High value crops	Yes
Jobs & growth: Under-utilised land, homelands etc.	No
Jobs & growth Agro –processing	Yes

# High-growth industries are on track



BFAP Baseline 2018

# Export performance on track



- SA a net exporter of agricultural products
- Horticulture leading export performance – rapid growth in Citrus exports, nuts, wool
- Significant imports: rice, poultry, palm oil, wheat

# Market access for South African products

**SACU:** Southern African Customs Union

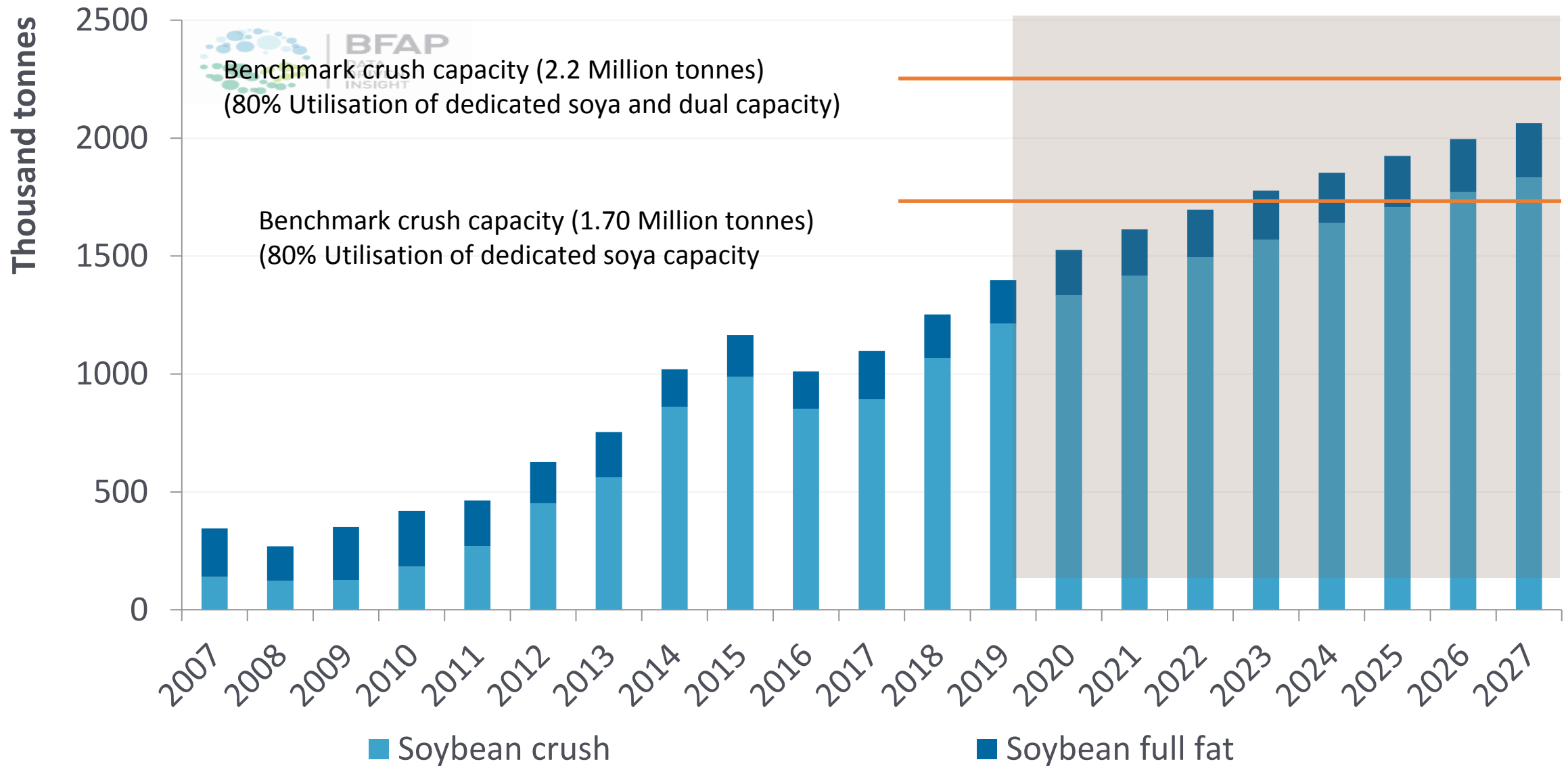
**GSTP:** Global System of Trade Preferences among developing countries

**PTN:** Protocol on Trade Negotiation

Source:  
SHAFPE, 2018

	South Africa	Australia	New Zealand	Peru	Chile	Argentina	Uruguay
<b>China</b>		Bilateral	Bilateral	Bilateral	Bilateral		
<b>Hong Kong (China)</b>					Bilateral		
<b>India</b>	SACU (Plurilateral)			GSTP	Bilateral GSTP	GSTP Mercosur-India Bilateral	GSTP Mercosur-India Bilateral
<b>Indonesia</b>		ASEAN-Australia-New Zealand	ASEAN-Australia-New Zealand	GSTP	GSTP	GSTP	
<b>Japan</b>		Bilateral		Bilateral	Bilateral		
<b>South Korea</b>		Bilateral		Bilateral GSTP PTN	Bilateral GSTP PTN	GSTP	PTN
<b>Malaysia</b>		Bilateral ASEAN-Australia-New Zealand	Bilateral ASEAN-Australia-New Zealand	GSTP	Bilateral GSTP	GSTP	
<b>Philippines</b>		ASEAN-Australia-New Zealand	ASEAN-Australia-New Zealand	GSTP PTN	GSTP PTN	GSTP	PTN
<b>Thailand</b>		Bilateral ASEAN-Australia-New Zealand	Bilateral ASEAN-Australia-New Zealand	GSTP	GSTP	GSTP	
<b>Vietnam</b>		ASEAN-Australia-New Zealand	Bilateral ASEAN-Australia-New Zealand	GSTP	Bilateral	GSTP	

# Major investments in Ag-processing on track

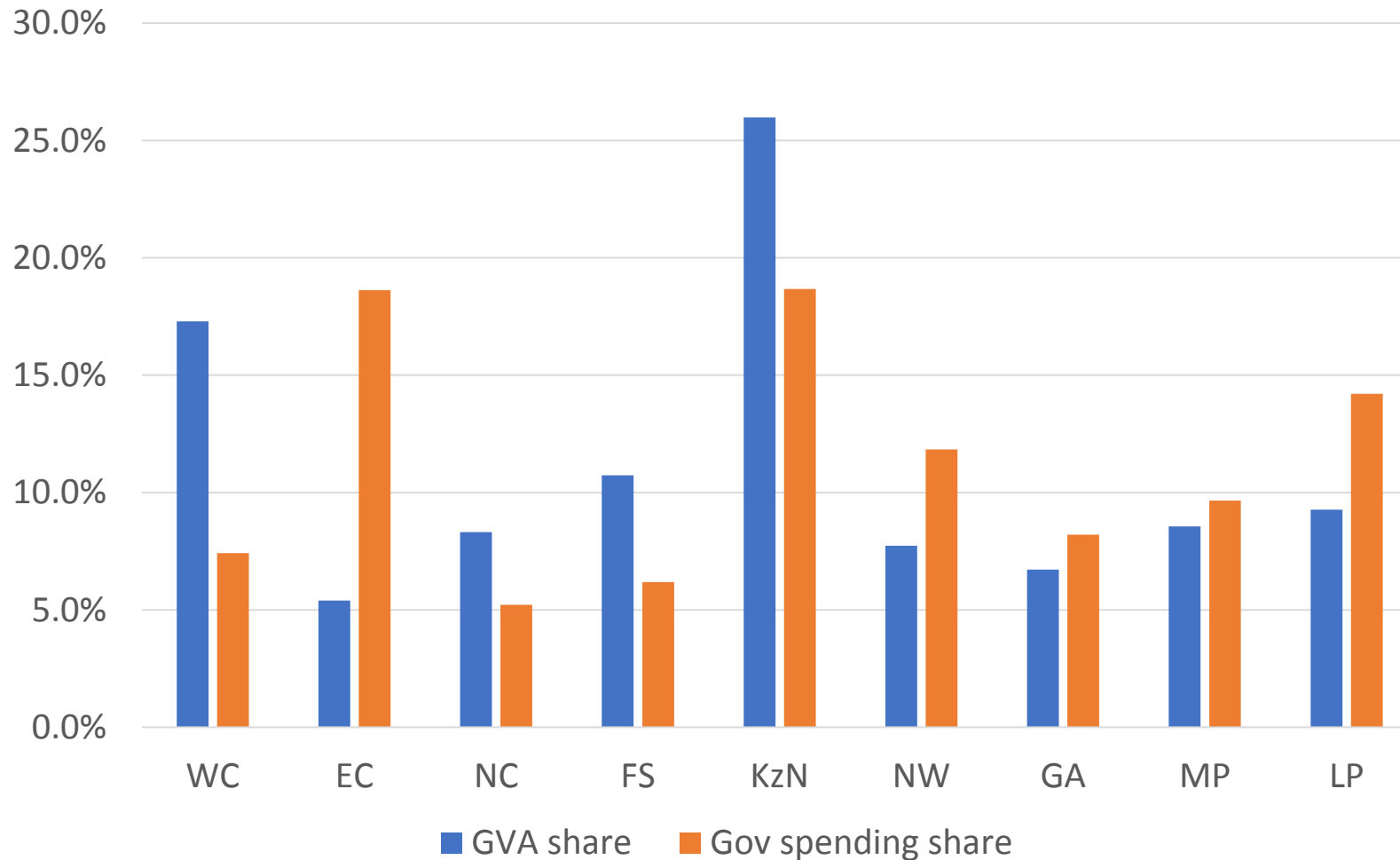




# Land-reform & farmer support **not on track**

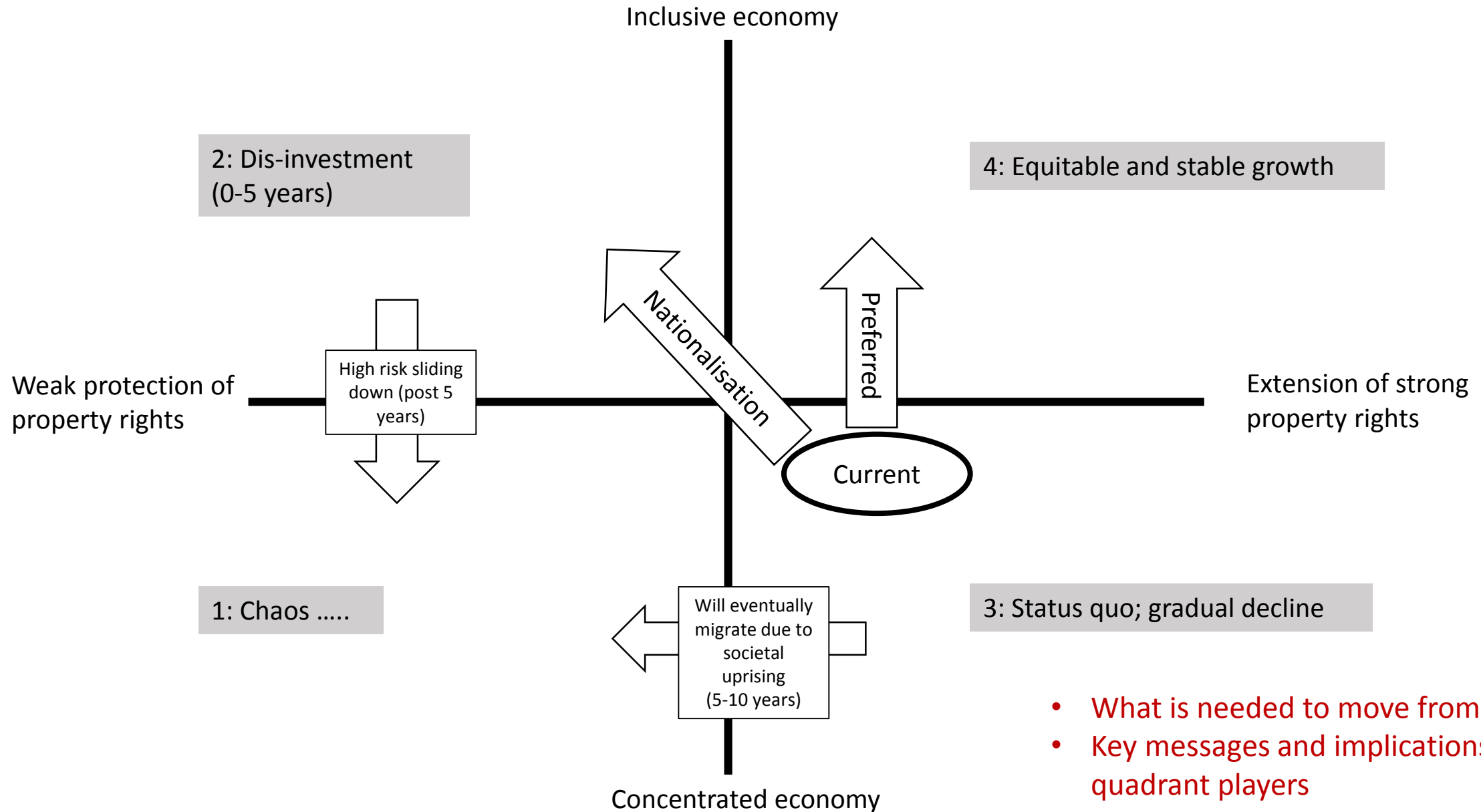


Agric GVA share versus Gov spending share



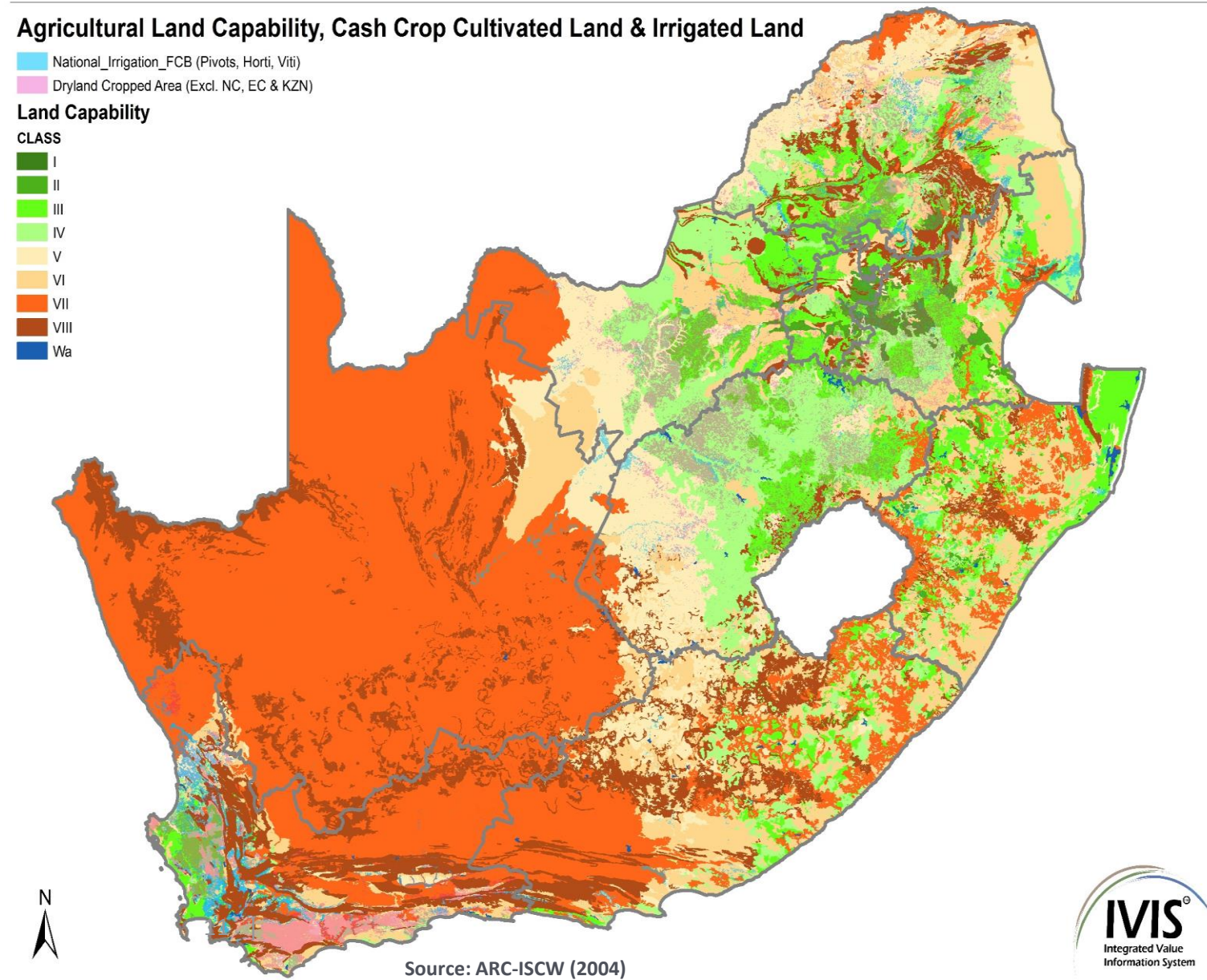
- DAFF spends R11 billion per annum
- Strong focus on smallholder farmer, but support programmes lack coordination, focus, effective management etc.

# Land reform scenario matrix



- What is needed to move from 3 to 4?
- Key messages and implications to quadrant players

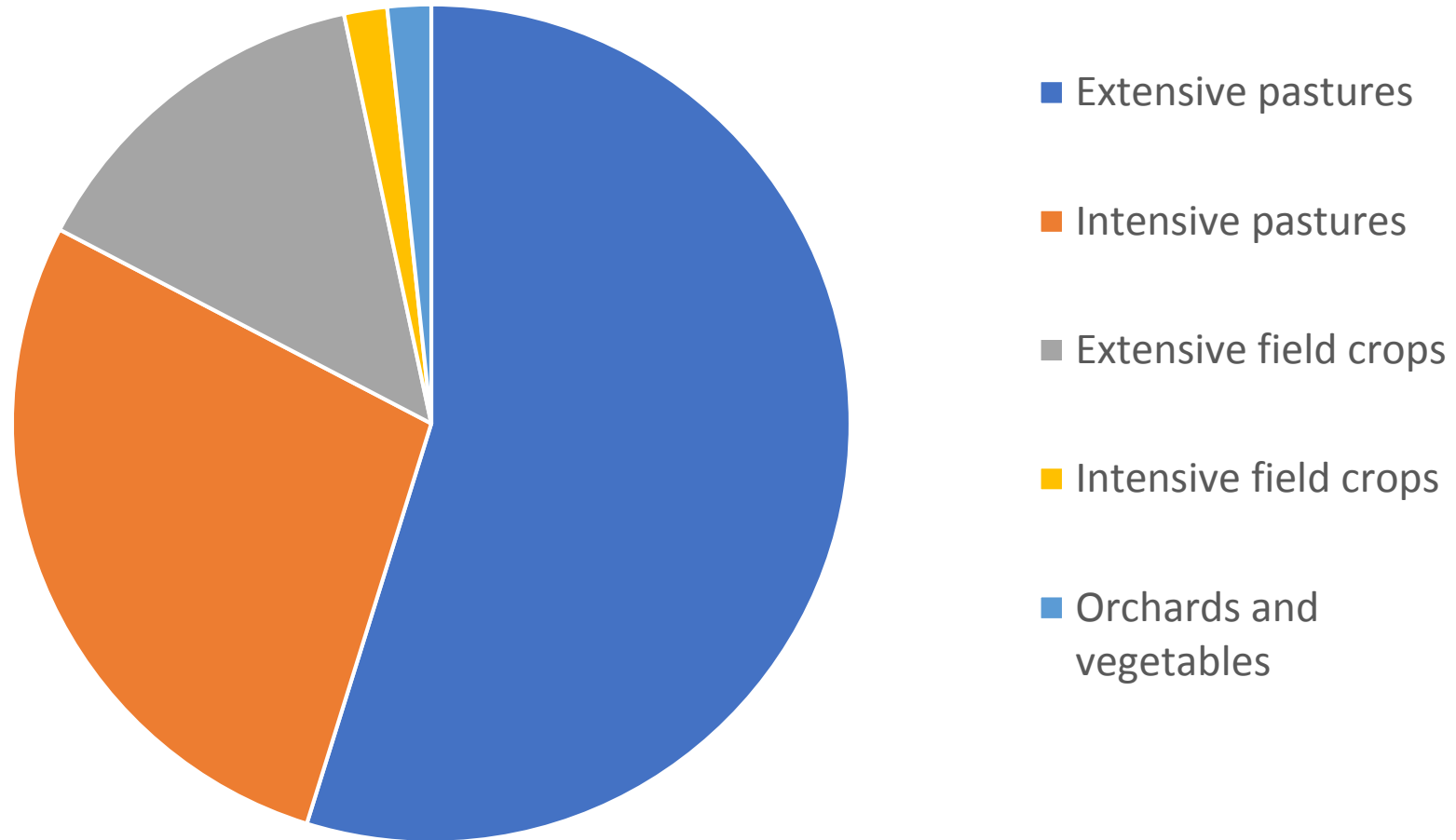
# Natural Resource Base & taking stock



- SA total area: 122 million
- Agricultural land: 93 million
  - Freehold: 77 mil ha
  - Former homelands: 15.5 mill ha (50 000 irrigation)
  - Land already transferred to state or people of colour: 11.44 million.
  - 66 million ha in white ownership
  - 3.9 million ha owned by state and municipalities
  - 1.26 Trancraa lands

# Land categories based on natural resources

Category of land based natural resource base

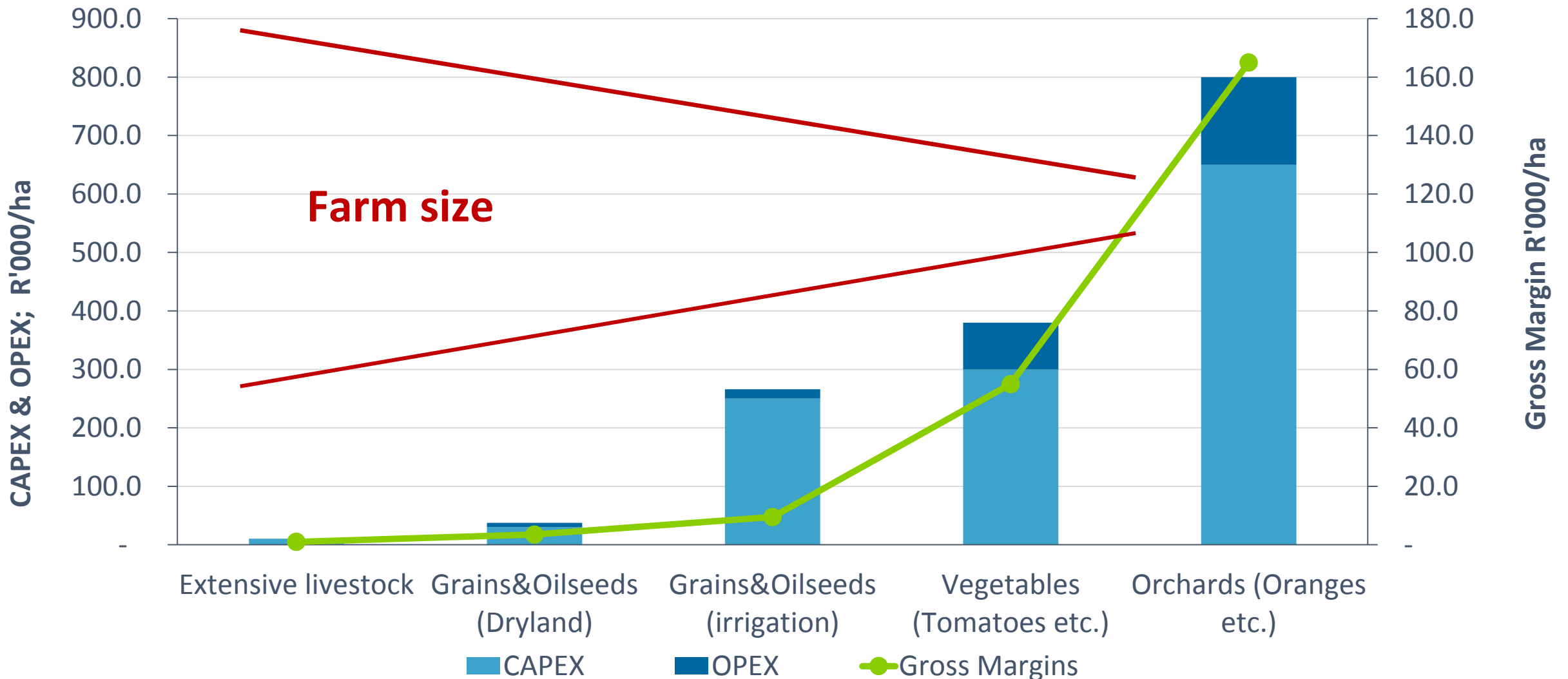


# Land Reform: One size does **NOT** fit all!



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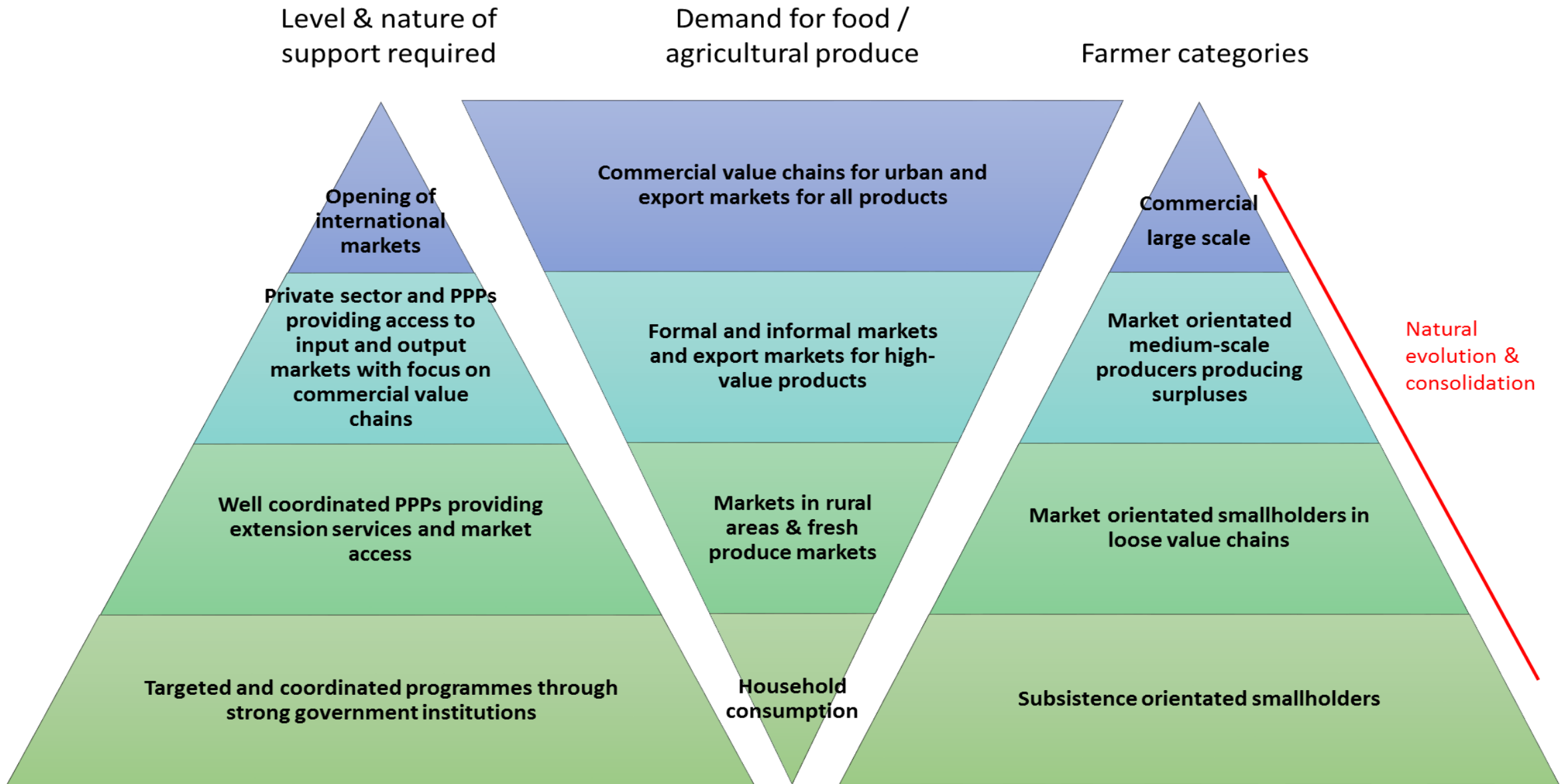
Net revenue per hectare (National 5-year averages)



# Food security - portfolio approach critical



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# Platform towards integrated support

Grain SA - Jobs Fund Fields

Mabizela Zehlele Ignatia (021100397003)

**FIELD INFORMATION**

Mentor Identification	Wiggill Paul
Crop planted last season	White Maize
Crop to be planted on this field	White Maize
Area	1.50
Latitude	-28.7697
Longitude	29.2011

**Map Information**

Base Layers

Active Layers

Active Features

☐ Show/Hide All

**Map Legend**

Jobs fund fields 2016/2017

Jobs fund fields 2016/2017

**Satellite view of field crop boundary**

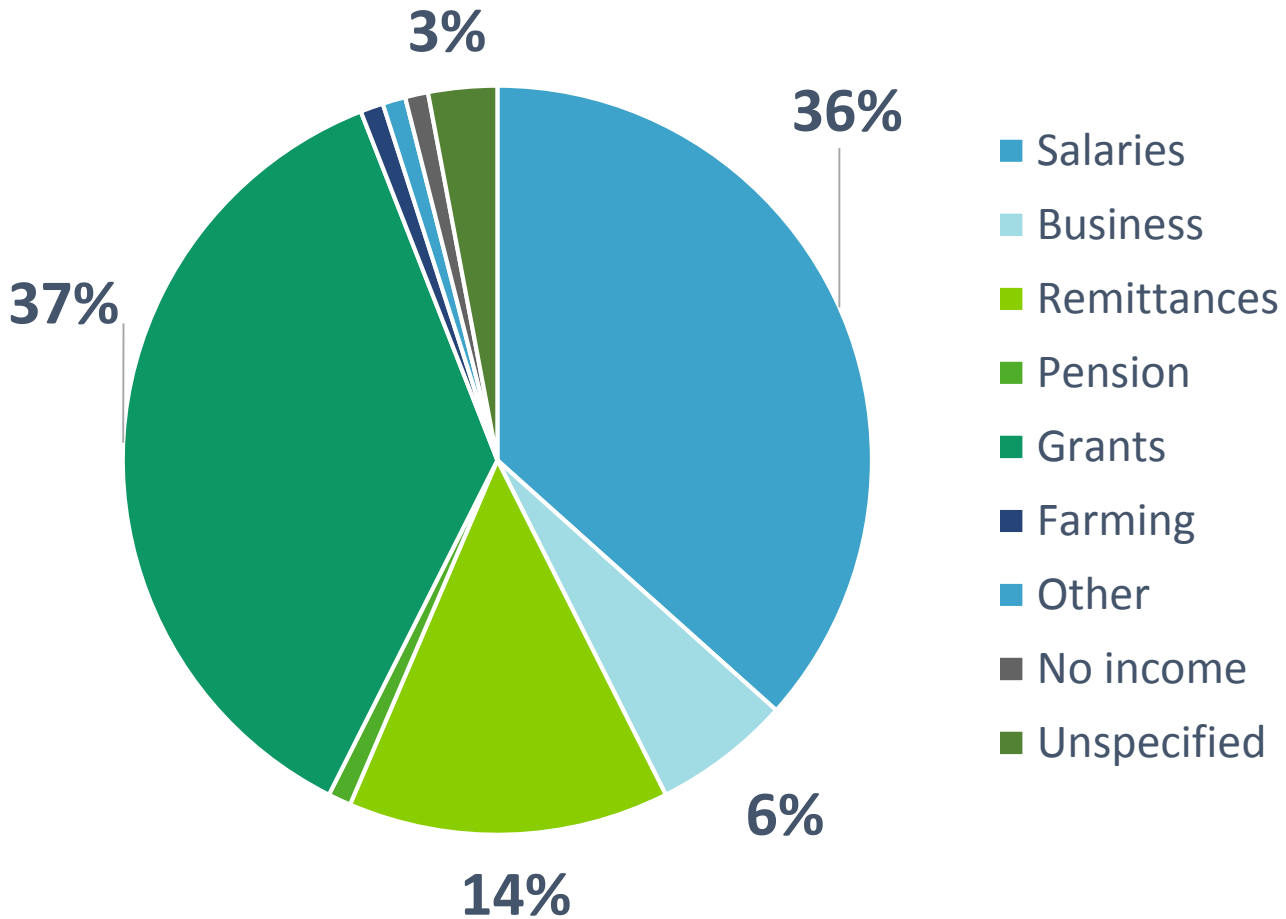
**photo**

**land**

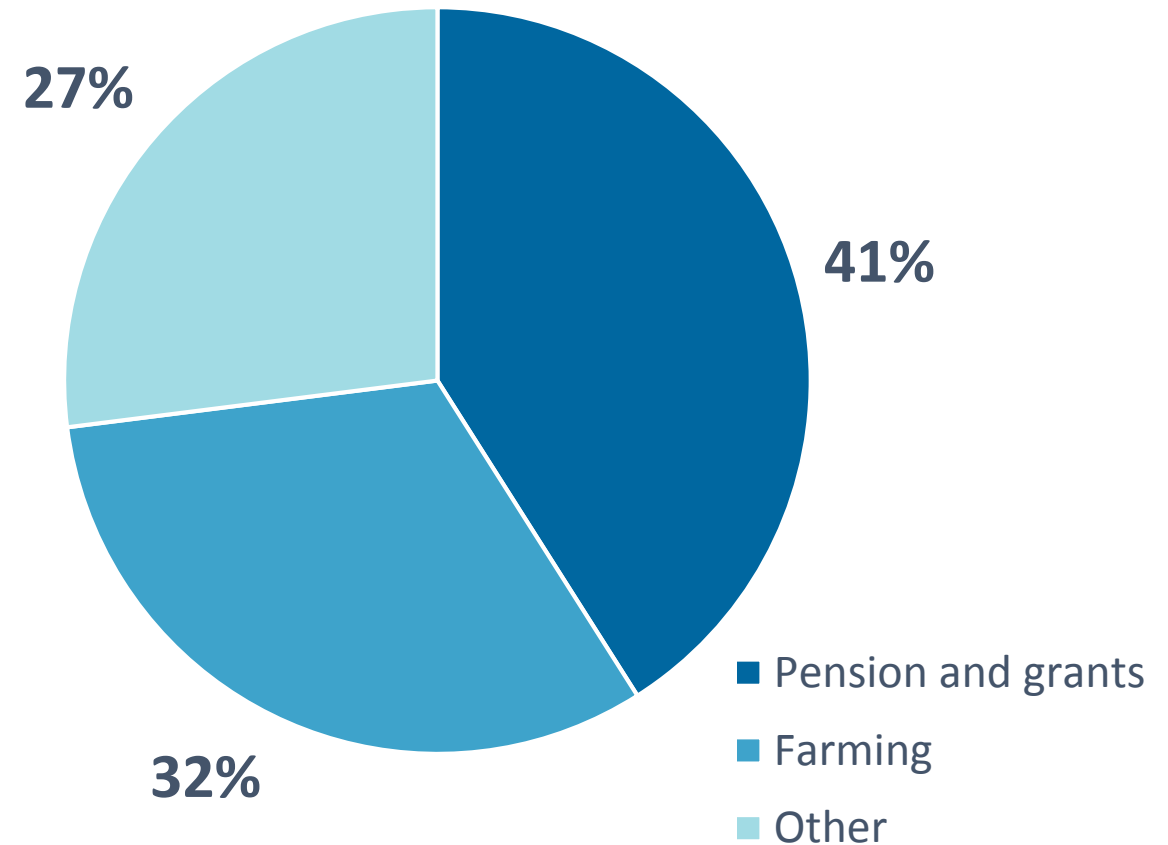
**Description of photo:**

# Farming as a source of income

**StatsSA 2015 Household survey**



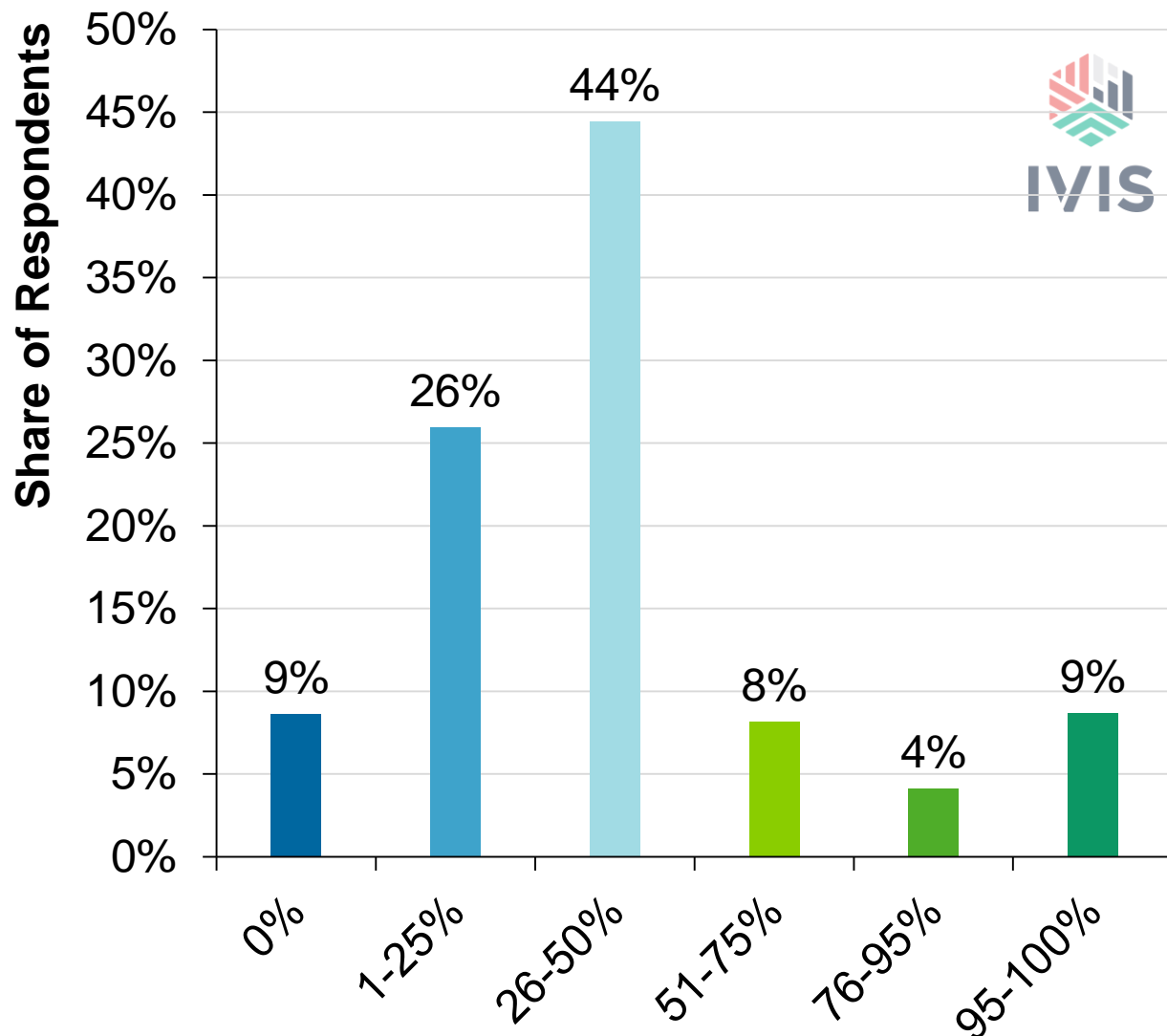
**2016/17 Jobs Fund – Targeted support programmes for developing farmers**



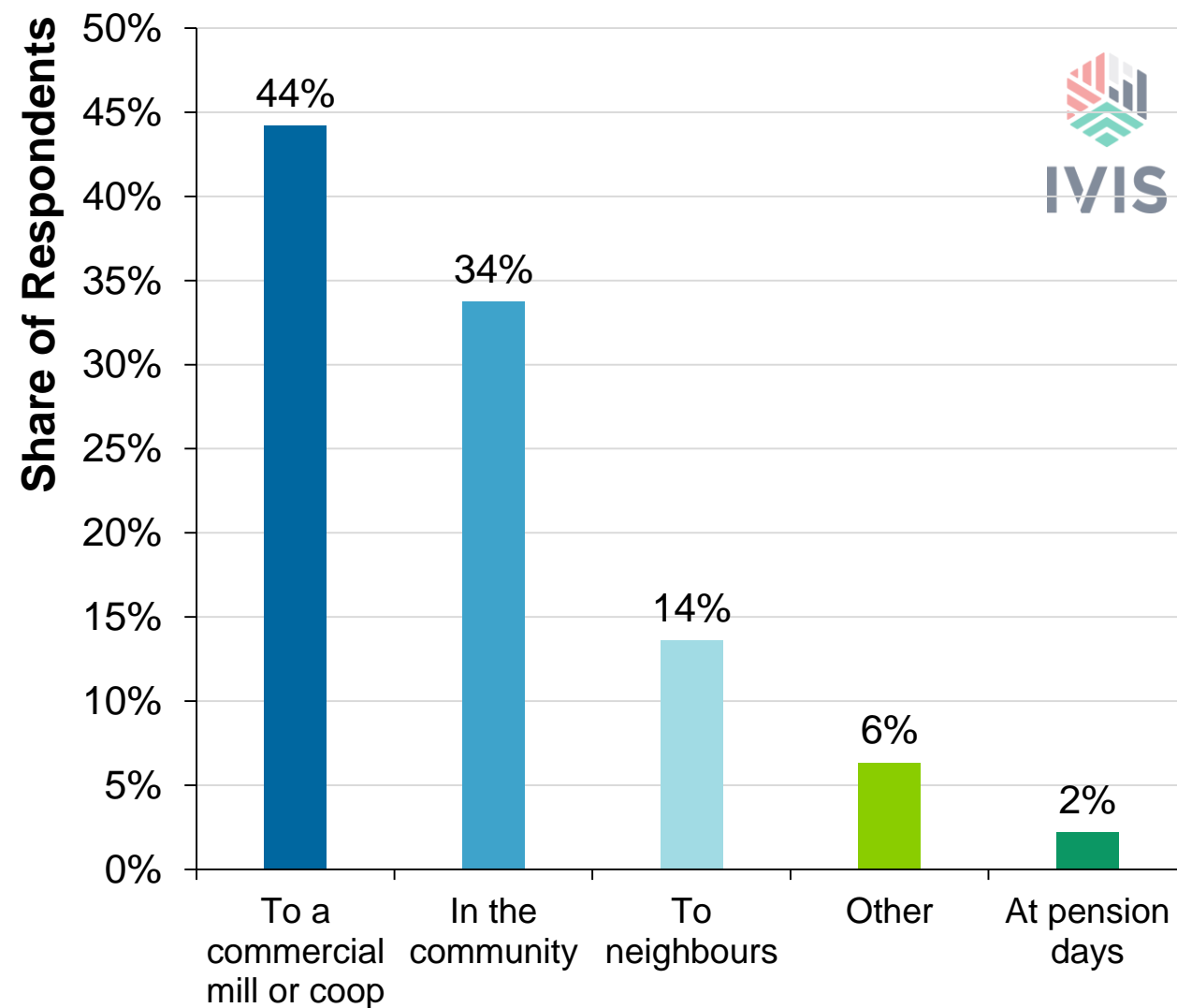


# Maize consumption & marketing

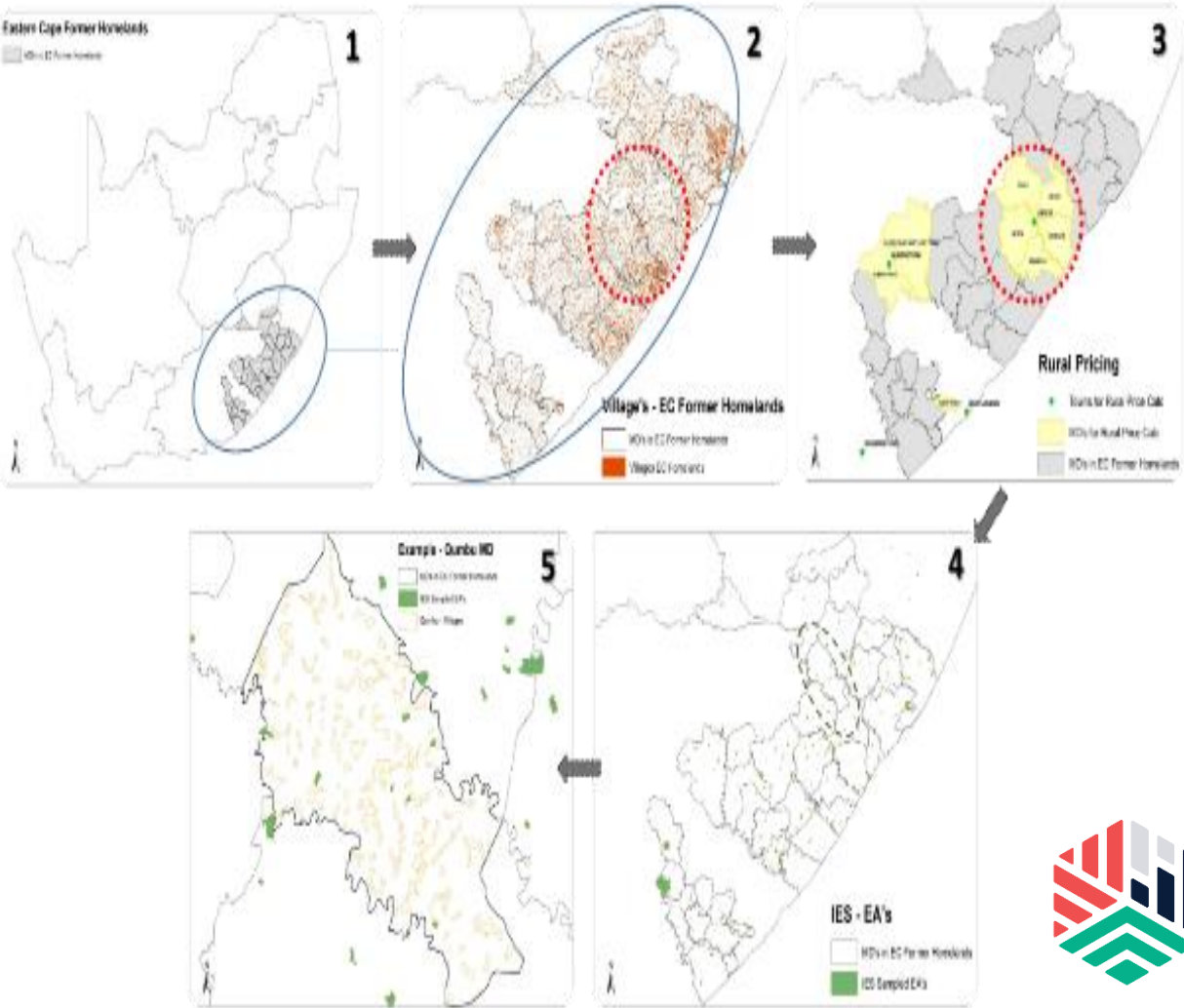
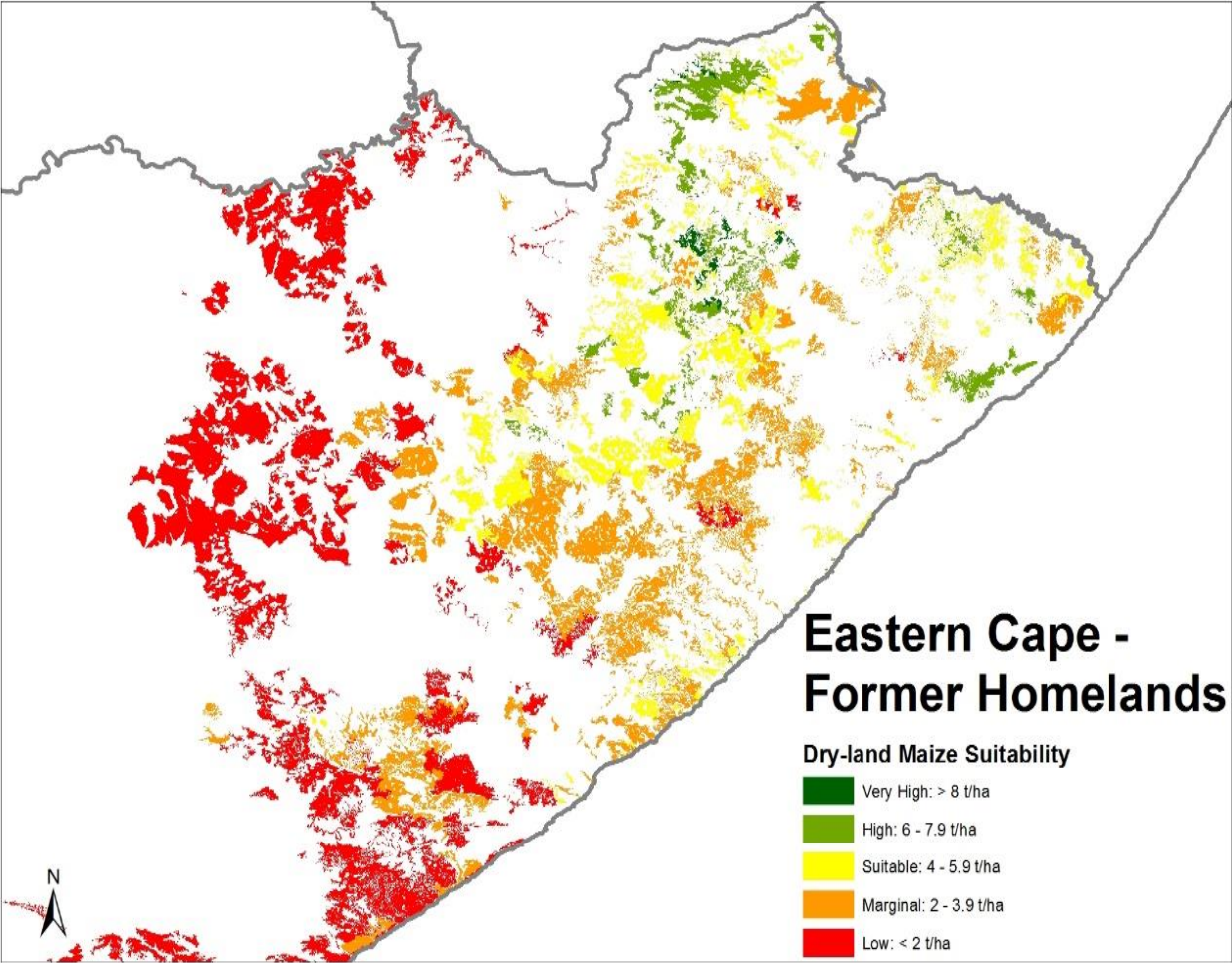
## Share of harvest consumed in the household



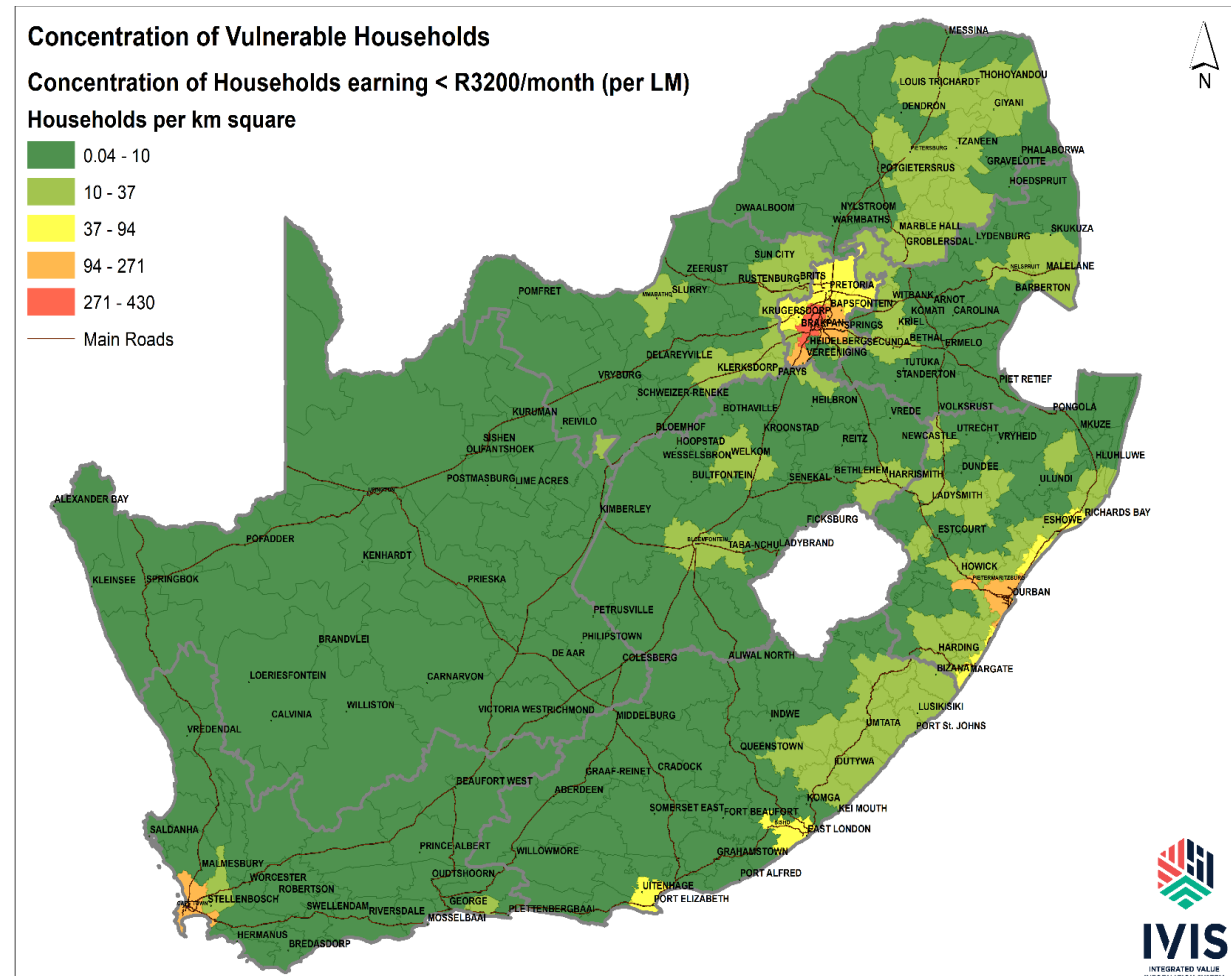
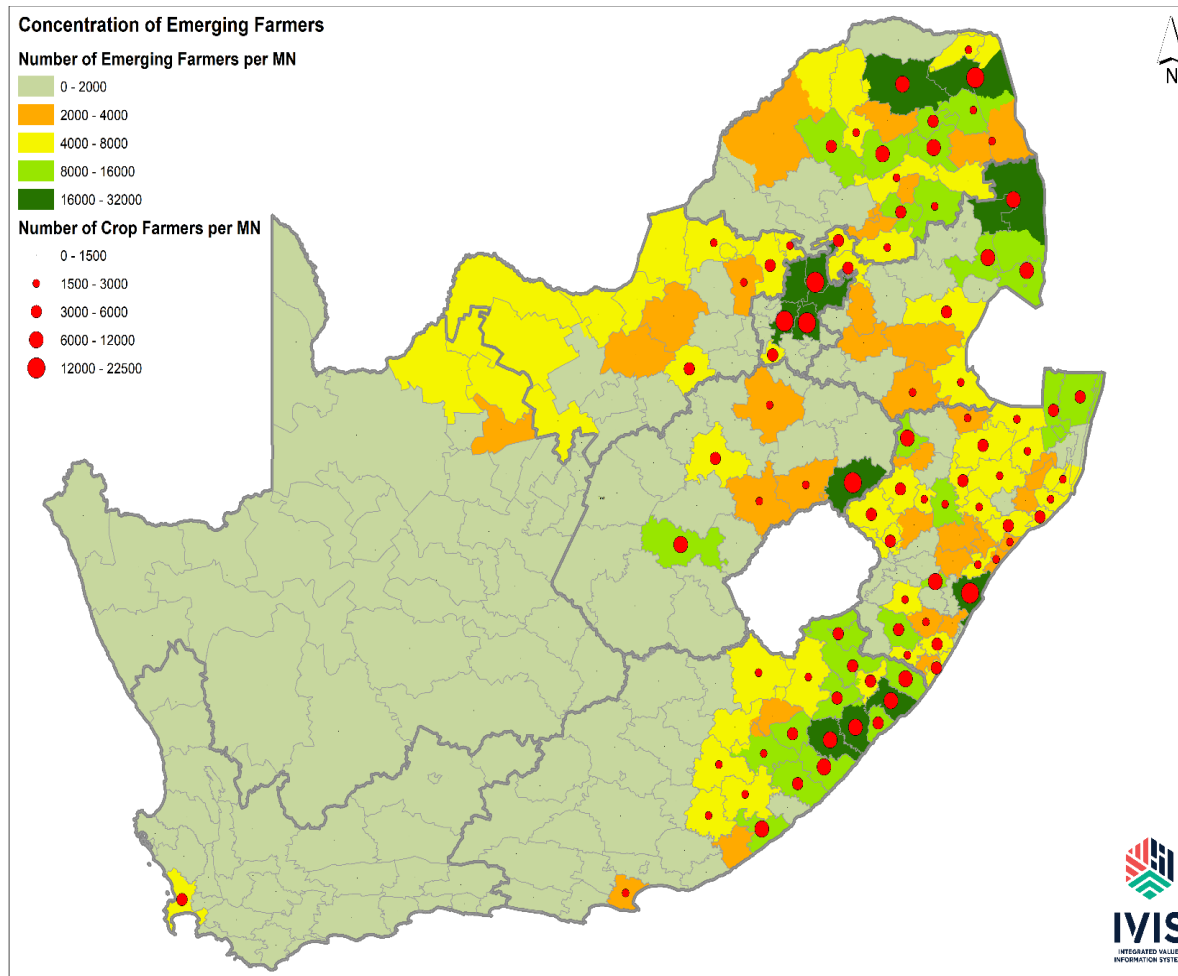
## Where farmers sold their 2016/17 grain



# Spatial Targeting: 300 000 ton market

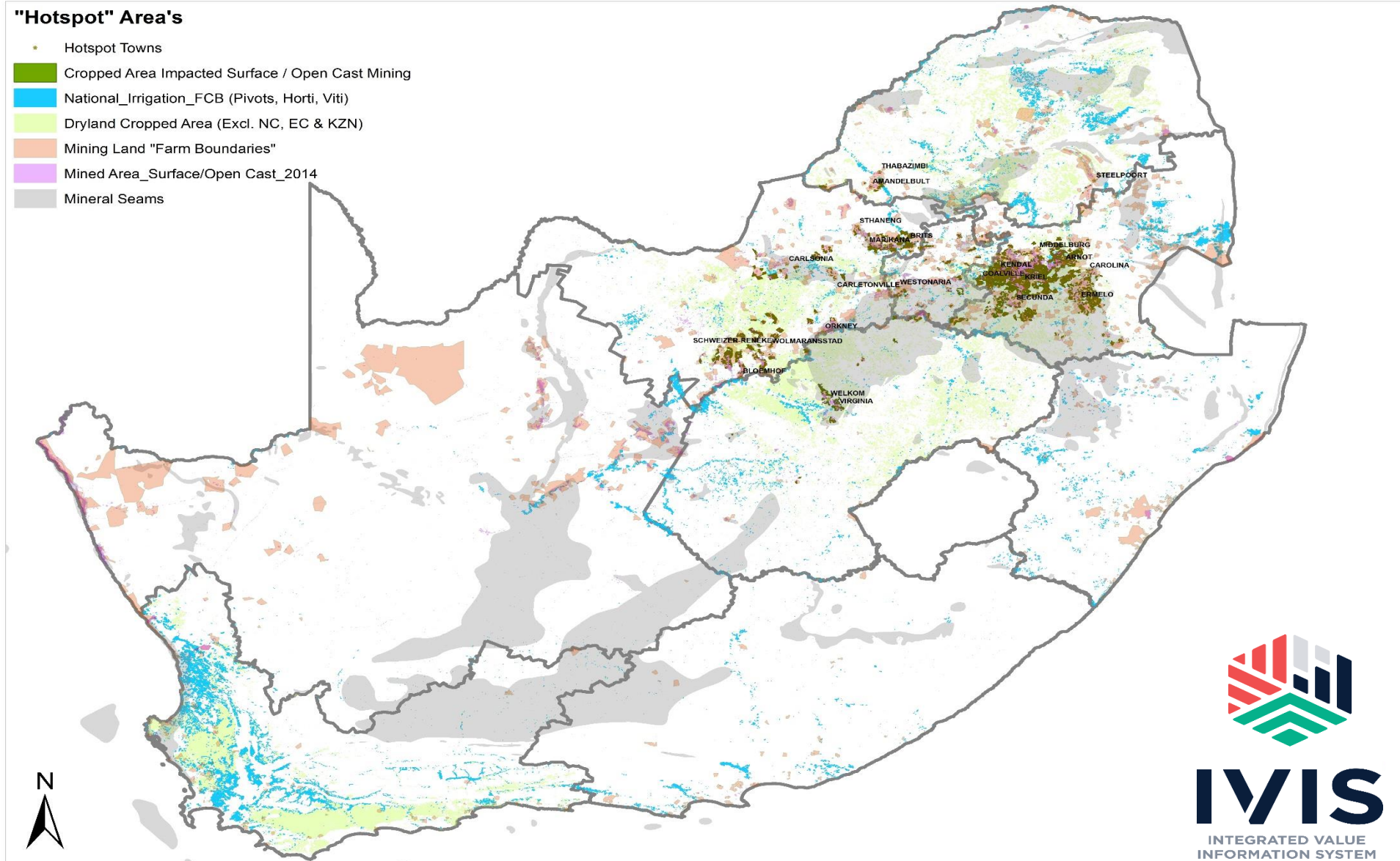


# Spatial Targeting: Emerging farmers & households





# Land-use Competition



Transformation in SA is about:

- The people
- The economy
- The environment

THANK YOU



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