



*An Integrated Marketing Strategy for
Agriculture, Forestry and Fisheries
Products in the
Republic of South Africa*

2012–2030



agriculture,
forestry & fisheries

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An Integrated Marketing Strategy for Agriculture, Forestry and Fisheries Products in the Republic of South Africa

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1. Aims and objectives

The overall aim of the integrated marketing strategy for agriculture, forestry and fisheries products is to minimise or eliminate market access constraints experienced by agricultural, forestry and fisheries producers and other value chain players in both the local and international markets and to lower transaction costs incurred in the marketing of agricultural, forestry and fisheries products. This Integrated Marketing Strategy for agriculture, forestry and fisheries products is developed to guide the implementation of the Agricultural Marketing Policy.

The strategy also serves as an important tool to achieve certain outcomes set out by government, specifically the following:

- Outcome 4: decent employment through inclusive economic growth;
- Outcome 5: skilled and capable workforce to support inclusive economic growth;
- Outcome 6: an efficient, competitive and responsive economic infrastructure network;
- Outcome 7: vibrant, equitable and sustainable rural communities with food security for all, and
- Outcome 10: environmental assets and natural resources that are well protected and continually enhanced.

The strategy also aims to assist in the attainment of the strategic vision of the DAFF, which is “a leading, dynamic, united, prosperous and people-centred sector”. The vision is to be achieved through developing and sustaining a sector that contributes to and embraces economic growth, job creation, rural development, sustainable use of natural resources, and the attainment of food security for all.

The specific objectives of the strategy regarding local market access constraints are to: –

- establish and strengthen commodity groups among producers of agricultural, forestry and fisheries products and facilitate integration with existing associations;
- guide the establishment of marketing institutions such as marketing cooperatives to support the development of smallholder producers and firms;
- guide investment in critical marketing infrastructure, particularly infrastructure that facilitates value addition and processing;
- direct the implementation of marketing skills development programmes that will help producers better to plan their production and marketing activities in accordance with market needs as well as to participate effectively in the markets;
- enhance the collection, dissemination and accessibility of marketing information to all producers and other role players through, among others, the marketing information system;
- identify agro-hubs for livestock, horticulture and field crops for appropriate and guided investment in agricultural marketing infrastructure;
- identify aquaculture and fisheries development zones for appropriate and guided investment in marketing infrastructure;
- identify forestry development zones for appropriate and guided investment, with particular focus on smallholder forestry producers;
- facilitate efficient flow of agricultural, forestry and fisheries products;
- direct the development of a credible programme of market research for agricultural, forestry and fisheries products to enhance competitiveness, value addition and future positioning in markets;
- establish the Marketing Assistance Scheme;
- guide and promote the establishment and proper functioning of value chain networks or roundtables for agriculture, forestry and fisheries subsectors;
- direct the development of a reliable, efficient and affordable programme for managing marketing risk for agricultural, forestry and fisheries products;
- direct the implementation of credible product safety and quality standards programmes to ensure that producers of agricultural, forestry and fisheries products meet quality grades and standards for the markets;

- guide the optimum utilisation of statutory measures in the development of different industries within the agriculture, forestry and fisheries sector, with particular emphasis on activities that promote the development of smallholder producers; and
- guide the effective functioning of industry trusts to ensure that their activities are development-oriented.

The specific objectives regarding international market access constraints are to: –

- set a basis for the establishment of partnerships with the private sector and other role players in the development and maintenance of an effective agricultural market research and intelligence system that will increasingly assist in proactive strategic positioning in global markets; and
- administer the allocation of import and export permits in line with South Africa – European Union (EU) Trade, Development and Cooperation Agreement (TDCA) as well as other trade agreements; and
- develop and implement export promotion programmes that will assist in the creation of export opportunities and increased exposure of foreign consumers for South African products, especially processed agricultural, forestry and fisheries products.

2. Marketing support programmes

In arguing for government support to domestic agriculture, the World Trade Organization's (WTO) Agreement on Agriculture identifies subsidies according to 'boxes'. Annexure 2 of the Agreement on Agriculture defines 'green box' subsidies as those that must not distort trade, or at most cause minimal distortion to trade and production. These types of subsidies must be government-funded (not by charging consumers higher prices) and must not involve price support. Domestic support measures, for which exemption from the reduction commitments is claimed, shall conform to two basic criteria, viz:

- that the support in question shall be provided through a publicly-funded government programme (including government revenue foregone) not involving transfers from consumers; and
- that the support in question shall not have the effect of providing price support to producers.

These programmes include, but are not restricted to the following:

- research, including general research, research in connection with environmental programmes and relating to particular products;
- training services, including both general and specialist training facilities;
- marketing and promotion services, including market information, advice and promotion relating to particular products but excluding expenditure for unspecified purposes that could be used by sellers to reduce their selling price or confer a direct economic benefit to purchasers; and
- infrastructural services, including electricity reticulation, roads and other means of transport, market and port facilities, water supply facilities, dams and drainage schemes and infrastructural works associated with environmental programmes but not including subsidies to inputs or operating costs, or preferential user charges.

Consideration may also be given to some of the 'blue box' and 'orange box' measures. It is, however, important to note that fish and aquaculture products as well as forestry products are not covered under the Agreement on Agriculture. This means that no provisions of the Agreement on Agriculture apply to fish and fish products and forestry products.

According to the National Aquaculture Strategic Framework (NASF) for South Africa, the country's fisheries' sector is guided by the voluntary Food and Agriculture Organization's (FAO) Code of Conduct on Responsible Fisheries, the FAO Technical Guidelines for Aquaculture Development and the NEPAD 'Fish for All' Action Plan for the Development of African Fisheries and Aquaculture. The aim is to ensure that aquaculture development contributes to the realisation of the Millennium Development Goals (MDGs). It can, therefore, be argued that for the aquaculture and fisheries subsector to fulfil its developmental role, an efficient marketing system for aquaculture and related products is necessary.

¹See Annex 1 to the World Trade Organisation Agreement on Agriculture

The 2007 – 2009 State of the Forests Report (2011) indicates that the forest sector is a significant contributor to the economy, both through the supply of renewable raw materials and through value addition in a range of primary and secondary processing operations, with the commercial (exotic) plantations and associated processing plants being the major contributors. South Africa continues to be a net exporter of forest products and the major export products are paper, pulp and solid wood. One of the major threats to forests is the growing production and trade of forest products worldwide, which is fuelled by rising consumption in developing and developed countries. These pressures or threats necessitate an efficient marketing system of forest products in order to ensure sustainability and that local demand is met from available forest resources. Another major challenge in the forest sector is that more opportunities are available to mainly large-scale commercial producers, at the expense of smallholder producers. As a result, market access remains a major impediment to full participation of smallholder producers in the forest subsector.

The national Department of Agriculture, Forestry and Fisheries will, in collaboration with other departments and private sector role players, set a basis for the establishment of marketing support programmes for agriculture, forestry and fisheries products to support smallholder producers and firms.

To achieve this, the department will first identify agro-hubs (that will require shared agricultural marketing infrastructure) for livestock, horticulture and field crops for public investments in the relevant marketing infrastructure. The department will also identify aquaculture and fisheries development zones as well as forestry development zones for appropriate and guided investment in marketing infrastructure. Another programme would be the establishment and strengthening of marketing cooperatives that will be equipped with appropriate infrastructure to perform the following activities at central locations: provision of marketing services such as grading, packaging and storage, value addition and processing, product quality certification, provision of transport services and consolidation of products to make economic units for transportation. To this effect, a programme of linking producers with the markets will be developed and implemented in collaboration with the provincial departments of agriculture, commodity groups, the private sector and other relevant stakeholders.

Other programmes will include the establishment and promotion of commodity groups or associations among producers of agriculture, forestry and fisheries products, establishment of various industry value chain networks or round tables, development of a credible programme of managing marketing risks, development of guidelines for optimum utilisation of statutory measures within the marketing environment, as well as guidelines for effective functioning of various industry trusts. The marketing information system for agriculture, forestry and fisheries products will also be developed and properly maintained and various marketing skills development programmes within the various subsectors will be developed and implemented. Credible programmes for product safety and quality standards, market research, as well as export promotion will also be developed and implemented.

2.1 COMMODITY GROUPS

Since deregulation, various agricultural industries (commercial farmers in particular) have successfully organised themselves into commodity associations as a service to their members. Among other things, market information is made available by these organisations. Post-deregulation, this information has become expensive and it can only be afforded by certain agricultural participants (mainly commercial producers), leaving the majority of smallholder producers with no access to this important marketing information. This critical challenge also manifests itself in various forms, both in the forestry and fisheries subsectors. Poor support to smallholder producers has led to a decline in productivity for different commodities in South Africa.

Realising this gap among smallholder producers and the importance of commodity groups, the Department of Agriculture, Forestry and Fisheries will:

- facilitate the formation of fully representative commodity groups among smallholder producers (without adopting a top-down approach);
- develop an integration model with the existing commodity associations for the future so that smallholder producers can also benefit from the services offered by these associations, new developments and opportunities;
- facilitate the establishment of small forestry grower associations within each of the grower districts/regions of the country and facilitate an affiliation to national grower associations;
- encourage cooperation among small processing plants to belong to processing plant associations to be able to negotiate with established forestry industry/companies on round-wood supplies and in improving technical and information services for their members; and

- encourage the establishment of a charcoal producers' organisation to represent the interests of charcoal producers in the forestry industry to promote the industry, shape the policy environment, secure access to support services (extension, funding, training) and establish joint ventures or cooperatives among small charcoal producers to add value to lump charcoal for local and export markets.

The long-term goal of this initiative is eventually to integrate these smallholder producers with the mainstream commodity associations formed by commercial producers. It is also in the interest of commercial producers to bring smallholder producers into commercial production to also improve their bargaining power. Skewed access to marketing information and other resources between well-established commercial producers and smallholder producers also necessitates the acceleration of transformation and broadening of participation by smallholder producers, especially youth, women and people with disabilities, in the mainstream value chains.

There are also protocols in export markets that exporters of agricultural, forestry and fisheries products must meet in order to access these markets, such as Marine Stewardship Council (MSC) certification, Aquaculture Stewardship Council (ASC), Forest Stewardship Council (FSC) certification, Global GAP and HACCP. The majority of commercial producers meet these requirements but smallholder producers may not have sufficient skills and production volumes to justify the cost of trying to meet these requirements. If smallholder producers produce for export markets then it may not be feasible to have each producer certified and therefore producers may need to form a cooperative in order to minimise costs.

With many smallholder producers producing for the market, 'horizontal' coordination in the form of farmers' associations can help create marketing opportunities. In instances where there are no producers' associations, the department will play a facilitatory role to support the establishment of some; while at the same time strengthening the existing associations among smallholder producers. The department shall collaborate with established agricultural, forestry and fisheries commodity associations in achieving this goal so that they may benefit from other producers' experiences.

2.2 MARKETING COOPERATIVES

The Department of Agriculture, Forestry and Fisheries recognises the important role that marketing cooperatives play as they allow producers to accomplish collectively what they cannot achieve individually. Most smallholder producers have relatively little or no bargaining power or influence with large buyers, agribusinesses, processors or food companies that purchase their products. Therefore, joining other producers in a cooperative and pooling their products together can give them greater bargaining power in the marketplace, be it in the agricultural, forestry or fisheries subsectors. Consistency in supply can be achieved and good prices negotiated, thereby improving their producers' relations with their buyers.

Additionally, marketing cooperatives can give producers an alternative marketing channel for their produce and reduce costs by shortening the marketing chain. Marketing cooperatives will assist in assembling products of a number of producers into larger lots to facilitate more efficient handling and competitive sales and then grade and transport these lots to the market. Some marketing cooperatives may perform first-stage processing while others may vertically integrate by processing products for the consumer or the industrial market. Marketing cooperatives can also negotiate with buyers, usually processors, on behalf of their producer members for prices and other terms of trade such as quality, quantity, form and timing of delivery (bargaining). The Department of Agriculture, Forestry and Fisheries therefore supports the establishment of marketing cooperatives that will be linked to an infrastructure base to accomplish these activities. A top-down approach to the establishment of marketing cooperatives will be avoided and marketing cooperatives in the different subsectors, i.e. agriculture, forestry and fisheries, will be established to suit the different environments and circumstances in respect of the different subsectors.

The Department of Agriculture, Forestry and Fisheries will:

- in cooperation with the provincial departments of agriculture, producers' and commodity organisations and other institutions, disseminate information among producers concerning the advantages, establishment and management of marketing cooperatives;
- in collaboration with the private sector in agriculture, forestry and fisheries, provide advice and training on leadership and management of marketing cooperatives; and
- encourage and promote joint marketing and value adding services of timber through grower cooperatives, small processing plants, cooperatives or as joint ventures between large and small-scale millers.

Points can also be earned for agri-industry's contribution to enterprise development, rural development or skills development on their AgriBEE scorecard while at the same time marketing opportunities will have been created for the private sector. Private sector role players in the forestry subsector can earn points on their scorecards as per the Forest Sector Charter while role players in the fisheries subsector may use the generic scorecard to guide and determine their contribution towards the transformation and development of the fisheries subsector.

2.3 MARKETING INFRASTRUCTURE

Agricultural marketing infrastructure is generally defined as any facility or tool that can be used by producers and traders to facilitate trade, transform raw agricultural products into value-added products through processing and packaging, storing agricultural products to smooth out supply and fulfil demand, transporting agricultural products to satisfy demand, collecting, collating, synthesising and disseminating market-related information. Among other things, marketing infrastructure comprises the following: storage units, including cold storage and regular ambient storage, ripening chambers and ice plants; grading facilities for specific qualities of produce; facilities for washing (cleaning) of fruit and vegetables; communication facilities (telephones, faxes, internet access, etc.); abattoirs and other processing facilities; livestock auctioneering facilities; wool shearing, cleaning and grading sheds; loading pens or ramps; marketing information accumulation and dissemination facilities such as computers; and any other relevant facility required by farmers and traders for marketing purposes (Department of Agriculture, 2006).

In the same breath, marketing infrastructure for fisheries and forestry products is defined as any tool or facility that can be used by producers and traders to facilitate the marketing and trading of raw fisheries and forestry products and products derived from them from the points of production and/or processing up until they are finally utilised by final consumers or industrial users. Such infrastructure may, in the case of fisheries products, include storage, packaging, processing and distribution equipment and facilities. In the forestry subsector, critical marketing infrastructure include value-adding and processing equipment and facilities such as pole treatment plants, furniture manufacturing plants, extraction and bottling equipment for honey, and processing plants for processing activities and fibre production and the subsequent distribution of the final products to the relevant markets at the right time, in required quantities and at the right price.

In the implementation of the marketing infrastructure development programme for agriculture, forestry and fisheries products:

- the Department of Agriculture, Forestry and Fisheries in partnership with the private sector will facilitate investment in critical marketing infrastructure, particularly infrastructure that facilitates value addition and processing;
- the government will provide the required funds, with co-financing from the private sector and development finance institutions to establish the infrastructure while its control and management will rest with the commodity or producer groups or relevant marketing cooperative;
- where appropriate, consideration will be given to the establishment of local depots/collection points to help assemble small volumes of produce from smallholder producers and then provide skills for these producers to improve and test for quality;
- opportunities for small processing plants to pool their resources to add value to their timber should be exploited, such as the establishment of centrally located kiln drying and treatment plants, the marketing of timber waste and value addition through small-scale furniture manufacturing; and
- small processing plants will be encouraged to participate in processing activities of large processing plants such as to fell, saw-up and sell certain sizes of timber in the value chain of large processing plants that can best be done through small-scale operations.

The state and its public entities shall identify opportunities to engage agribusiness companies and other companies in the forestry and fisheries subsectors in the establishment of depots or collection points. Agribusiness companies that support the establishment of marketing infrastructure for smallholder producers shall also be entitled to points on their AgriBEE scorecards for the enterprise development/rural development element. Similarly, private sector companies in the forestry subsector that support the establishment of marketing infrastructure can earn points on their scorecards as per the Forest Sector Charter while those in the fisheries subsector may use the generic scorecard.

The approved National Guidelines (norms and standards) for Public Investment in the establishment of Agricultural Marketing Infrastructure shall form the basis for implementation.

2.4 AGRO-LOGISTICS

The Department of Agriculture, Forestry and Fisheries in collaboration with the agricultural, forestry and fisheries industry and the private sector will implement a logistics strategy with the following aims:

- to facilitate the development of solutions for logistical problems in the freight corridors and development zones with high production potential;
- to facilitate innovative solutions to solve the problem of deep rural freight transport;
- to create economically sustainable models for marketing infrastructure ownership;
- to facilitate innovative solutions to deal with infrastructure congestion;
- to make value-adding logistical services available to smallholder producers to improve market access; and
- to lobby for upgrading of road infrastructure that negatively impacts on harvesting of forest plantations and veld fire control.

2.5 MARKETING INFORMATION

Market information is essential for producers of any produce who wish to become fully competitive and ensure that their production is in line with market demand. The availability of reliable market information can help producers to reduce the risks associated with marketing, decide where to sell their produce, check whether or not the prices they are offered are in line with market prices, decide to store or not, produce products "out of season" or produce different products. Reliable market information also improves market transparency and producers' bargaining power. Producers are mainly interested in market information on product prices, price trends and buyers for their products. Producers can use market information in several ways. Current or immediate information can be used first to decide what to produce and to negotiate with buyers or traders, to decide whether or not to go to a market and, in some cases, to decide which market to supply. Historical information, such as time series data of prices over several years, can be used to make decisions regarding product diversification or the production of out-of-season products. It may even help producers identify opportunities for cash income.

At the basic level, availability of market information can enable producers to check on the prices they receive, vis-à-vis the prevailing market prices (Shepherd, 1995). Commercial producers are capable of sourcing price and buyer information from websites, publications and commodity groups while smallholder producers rely on other producers and government extension staff for the same information. There is a great need to make information available to smallholder producers at the right time and place. In response to this challenge the Department of Agriculture, Forestry and Fisheries shall:

- analyse various marketing value chains in the agricultural, forestry and fisheries subsectors and make this information available to stakeholders as market value chain/commodity profiles on an annual basis; and
- develop and distribute quarterly market analysis bulletins for key commodities within the three subsectors (agriculture, forestry and fisheries).

Furthermore, the Department of Agriculture, Forestry and Fisheries has developed a marketing information system (MIS) to disseminate a variety of marketing information to producers. The system is currently web-based and the following alternative networks can be used to disseminate market information, even to the remote rural areas, as a way of expanding the marketing information system:

- cellphone technology through the use of the Short Message System or SMS (this tool will be able to disseminate the most crucial information on prices to producers);
- radio broadcasts (market prices for various products can be broadcast daily on radio stations for all major production areas or markets, especially for agricultural and fisheries products. Broadcasts should be in a form that is suitable for most producers as some are illiterate, should be in various local languages and at the most convenient time for producers to be listening. Radio stations should be convinced to see market information as a public service, equivalent to news broadcasts, and not paid advertisements. The Department of Agriculture, Forestry and Fisheries or designated body should take the responsibility to monitor the relevant website/s and forward this information by e-mail or fax to each station. If the MIS is to have an impact on smallholder producers, the provision of market information must be accompanied with the provision of advice for the producers on interpreting the information. Ideally, special radio and television programmes to explain the MIS, the information provided and how to use it should be prepared and aired at least once a quarter. The MIS Unit can also prepare training materials to

carry out the training programme themselves or train the trainers in the provinces and districts, who should ideally be agricultural economists;

- the Display Technology System (DTS), which uses plasma displays (ideally situated in the provincial and district offices of the DAFF, multipurpose community centres and agricultural, forestry and fisheries development centres), connected centrally to computers which are linked by a network to a central computer from where the system is managed and updated daily. This system can display daily prices of products, commodity prices, exchange rates, weather conditions, fuel prices and any other important information the department and producers see fit;
- newspapers or the print media; and
- social networks such as Facebook, twitter, mxit, whatsapp, etc. (accounts can be opened on these networks and market information can be posted on a regular basis from a central point by dedicated personnel in different districts, provinces and nationally).

In addition to the expansion of the MIS, both the department and the entire agricultural, forestry and fisheries industry realise the importance of reliable information for efficient functioning of markets and therefore the department will:

- facilitate a process leading to the establishment of information platforms similar to SAGIS (South African Grain Information Service) in the livestock, horticulture, aquaculture, fisheries and forestry industries to provide these industries with vital marketing information;
- establish a fully fledged MIS Unit to undertake collection, collation and dissemination of marketing information;
- In collaboration with the aquaculture industry, enable access to information on aquacultural products wholesale, retail and feed ingredient prices from the main domestic and international markets to aquaculture producers, processors, feed manufacturers and consumers;
- collaborate with the aquaculture industry in the establishment and operation of an Aquaculture Information Unit (AIU) which will serve as a primary repository for South African aquaculture information;
- support initiatives aimed at increasing domestic consumption of aquaculture products; and
- collaborate with industry in improving marketing education for producers, processors and consumers relating to characteristics and handling of aquaculture and seafood products.

It is further proposed that SAGIS be expanded to cater for the information needs of other field crops that are currently not covered.

To achieve this, the Department of Agriculture, Forestry and Fisheries shall collaborate with the latter four sub-industries or subsectors and the respective industry trusts. All agricultural industries that collect statutory levies and have industry trusts shall be encouraged to create these information platforms and hyperlink them to the department's MIS.

2.6 MARKETING SKILLS DEVELOPMENT

Access to marketing skills is one of the critical requirements in moving smallholder producers towards the desired level of commercialisation. The Department of Agriculture, Forestry and Fisheries shall therefore implement a marketing skills development and capacity-building programme to help smallholder producers to better plan their production and marketing activities in accordance with the market requirements, as well as to participate effectively in the mainstream agricultural, forestry and fisheries markets. All players in the different commodity value chains, including producers, processors and consumers need marketing skills for efficient trading and flow of products, be it agricultural, forestry or fisheries products.

To achieve this, the Department of Agriculture, Forestry and Fisheries in collaboration with producer bodies shall develop and implement marketing skills development and market access capacity-building programmes by: –

- developing, continuously refining and updating the marketing training materials;
- using the accredited marketing training materials to facilitate and conduct training for smallholder producers;
- establishing links with training institutions that provide marketing skills development and market access training needs and collaborate in providing training to producers;
- liaising with training colleges/development institutes, commodity organisations and other organised formations within the agriculture, forestry and fisheries sector to develop and facilitate or offer market access training as required;

- collaborating with industry organisations, producers and provincial departments responsible for agriculture, forestry and fisheries in understanding producers' needs in terms of market development and access and developing remedial training programmes;
- entering into agreements with other institutions and/or organisations to perform these functions;
- encouraging research into marketing skills and capacity building; and
- using formalised mentorship programmes as part of the capacity-building tools for developing smallholder producers.

When companies in the agriculture, forestry and fisheries sector dedicate resources to collaborate with the state in the provision of marketing skills for smallholder producers, they can also claim points for compliance with the skills development element of either the AgriBEE scorecard or generic BBBEE scorecard.

2.7 MARKET RESEARCH AND MARKET INTELLIGENCE

Market intelligence is about providing a company with a realistic view of a specific market, using existing sources of information (which may be external or internal data) for a better understanding of what is happening in the market place, what the main issues are and what the likely market potential is. Market intelligence can be gathered through desk research and by identifying competitors and analysing their market position, identifying market prospects and partners and collecting information on competitors. Market intelligence studies should therefore occur at industry level by the private sector. Market research helps companies understand markets and customers' needs and wants (demand) to improve business and marketing effectiveness. The agricultural, forestry and fisheries sector and the department realise the importance of market intelligence and market research.

The Department of Agriculture, Forestry and Fisheries will support industry-level market research by facilitating commissioned demand and opportunity-directed marketing research (technical) for the agricultural, forestry and fisheries industry (in partnership with the industry) to enhance competitiveness and future positioning in markets. The Directorate: International Trade within the DAFF and the National Agricultural Marketing Council (NAMC) will be leading institutions for conducting independent and applied market research and intelligence relating to agricultural, forestry and fisheries products. The department will also facilitate and support industry efforts aimed at gathering and utilisation of market intelligence to develop new and expand existing markets for agriculture, forestry and fisheries products.

2.8 MARKET LINKAGES

In administering trade measures and agreements, the Department of Agriculture, Forestry and Fisheries is routinely involved in administering and issuing negotiated agricultural, forestry and fisheries market access import and export permits for a range of agricultural, forestry and fisheries products. It is anticipated that the successful implementation of the agricultural, forestry and fisheries market access programme will enhance the achievement of the following:

- increasing the number of smallholder producers and traders using market facilities for disposal of their own produce;
- increasing the number of newly established producers marketing agricultural, forestry and fisheries produce on the domestic markets;
- opening market access opportunities for previously disadvantaged producers and traders; and
- removing barriers to access mainstream agricultural, forestry and fisheries markets.

Market access opportunities under the WTO (Marrakesh Agreement) makes provision for specified products to be imported at reduced rates of duty subject to a rebate permit, such as dried beans, malt extract, food preparations, pasta, wines and spirits, dried and frozen vegetables, meat, dairy products, dried fruit, cotton and tobacco. The department also issues rebate permits under the tariff heading 04.09 for importing natural honey that must be repackaged immediately in quantities of less than 1 000 g. The allocation of these market access permits will be used to enhance access to markets by smallholder producers and emerging traders and entrepreneurs.

Furthermore, as part of the concessions provided for in terms of the Trade, Development and Cooperation Agreement (TDCA) between the European Union and South Africa, tariff preferences were granted on limited quantities of selected products in the form of tariff quotas. Products that can be exported to the EU are cheese, cut flowers, frozen strawberries, canned fruit, including pears, apricots, peaches and mixed fruit, fruit juices, including frozen orange

juice, pineapple juice and apple juice as well as wines made from fresh grapes—sparkling wine, white wine and red wine.

In order to ensure the participation of smallholder producers in markets, the Department of Agriculture, Forestry and Fisheries in partnership with the private sector and commodity groups will develop and implement a credible programme of linking producers to markets and procurement opportunities. The government will implement a series of initiatives to leverage private company resources and infrastructure to expand the engagement and participation of smallholder producers in commercial agriculture, forestry and fisheries supply chains. This will be achieved through collective actions and various types of contract schemes, thereby creating further opportunities for service provision. Additionally, a range of incentive schemes will be used to support contracting.

Secondly, the government and its institutions will position themselves as guaranteed buyers for smallholder producers' produce and apply preferential procurement when buying food for school feeding schemes, hospitals and correctional service facilities. The government will also, through strategic partnerships with the private sector, ensure that produce from smallholder producers in the forestry and fisheries subsectors have access to domestic, regional and international markets. The allocation of fishing permits by the government will also be used to promote market access by smallholder fishermen while the effective use of market contracts will be promoted as a major mechanism to promote market access for smallholder producers of forestry and related products.

2.9 STATUTORY MEASURES

The Marketing of Agricultural Products Act, 1996 (Act No. 47 of 1996 as amended in 1997 and 2001) provides for a directly affected group to request in writing to the Minister to establish, continue, amend or repeal one or more statutory measures. The implementation, administration and enforcement of statutory measures may be entrusted by the Minister by notice in the Government Gazette to any juristic person, institution or department. The Minister may also introduce a levy or levies on any agricultural product or class thereof. The Minister may also, by notice in the Gazette, direct that any person should keep such records and returns as may be specified with regard to the agricultural products or classes thereof and direct that such records and returns be furnished to the juristic person or institution referred to in the notice. The Minister may also direct that any person mentioned with regard to the agricultural product or class to which the notice pertains be registered as specified in the notice.

Levies collected through statutory measures may be utilised for a variety of functions, such as market access issues (including trade and development), product development, industry promotion, information and communication, research and development and transfer of technology, transformation and training and capacity development. Statutory measures relating to records and returns compel parties set out in the notice to keep records and render returns to the administrator of the statutory measure while registration ensures that a register of all directly affected groups is available. The Department of Agriculture, Forestry and Fisheries will promote the utilisation of statutory measures to ensure the following:

- enhancement of market access through market research and development;
- ensuring that continuous, timeous and accurate industry information is available to all role players;
- ensuring the collection and dissemination of market and product data;
- ensuring and promoting transformation initiatives within the agricultural, forestry and fisheries products; and
- promoting and supporting research initiatives aimed at the promotion of value-added agricultural, forestry and fisheries products.

2.10 INDUSTRY TRUSTS

The promulgation of the Marketing of Agricultural Products Act, 1996 (Act No. 47 of 1996) resulted in the abolition of the former marketing control boards. This subsequently led to the cessation of all important support functions that these institutions were offering. All assets that belonged to the former control boards were transferred to different industry trusts, which were formed by various industry bodies immediately after the control boards were abolished. The functions that were previously performed by the control boards included market facilitation and development, marketing information and intelligence, the provision of marketing infrastructure, etc. Since the abolition of the control boards, the provision of these important marketing services has been limited, prompting associations of commercial producers to provide these services to their members. Smallholder producers are finding it difficult to access markets because their access to appropriate marketing services is very limited.

Given the difficulties experienced by especially smallholder producers in accessing markets, the Department of Agriculture, Forestry and Fisheries will advocate for partnerships between industry or commodity associations, government and private sector companies to facilitate the opening-up of markets for especially smallholder producers of agricultural, forestry and fisheries products. In this regard, industry trusts are encouraged to:

- co-fund initiatives aimed at promoting produce of smallholder producers in domestic and international markets;
- co-fund research and technology development and transfer;
- co-fund the establishment of marketing infrastructure with a focus on smallholder producers;
- co-fund marketing skills development and capacity-building programmes; and
- fund initiatives aimed at the advancement of smallholder enterprises in the agriculture, forestry and fisheries sector.

2.11 PRODUCT SAFETY AND QUALITY STANDARDS

Meeting minimum quality and product safety standards by especially smallholder producers in South Africa is a great challenge and it limits their access to various mainstream markets. This is partly because certification requirements and procedures are often perceived as being too stringent and costly for smallholder producers. The ability of the different components of government and other regulatory bodies to implement and monitor various product safety and quality standards compliance requirements along the various value chains is also another area that needs adequate attention by both the government and the private sector. It is also important to recognise that there are various players in South Africa responsible for product safety and quality standards. The various institutions include, among others, the Directorate: Food Safety and Quality Assurance (FSQA) within the DAFF, the South African Bureau of Standards (SABS), the Perishable Products Export Control Board (PPECB), private certification bodies as well as the Department of Health (DoH). These institutions often work independently of each other and in isolation from one another. In view of these challenges, the Department of Agriculture, Forestry and Fisheries will collaborate with producers, the private sector and all other relevant value-chain players to:

- build capacities for especially smallholder producers to be able to meet product safety and quality standards for domestic and international markets;
- strengthen mechanisms for accreditation, testing and monitoring product safety and quality standards of domestically produced and imported products;
- develop, maintain and promote product safety, quality and traceability standards;
- enhance intradepartmental cooperation to ensure product safety and quality standards;
- assure product safety and quality of agricultural, forestry and fisheries products through innovative processing technologies and new product development;
- ensure and promote the registration and availability of safe and effective insecticides, pesticides, therapeutants, etc., for use in the agriculture, forestry and fisheries sector;
- harmonise national and international product safety and quality standard procedures and guidelines and ensure consistent interpretation and implementation;
- work with the agriculture, forestry and fisheries sector to develop codes of good practice relating to product safety and quality standards within the agricultural, forestry and fisheries sector;
- simplify information on food safety and quality standards and make it available as public knowledge;
- facilitate the development and implementation of forestry certification schemes that meet the requirements of small growers; and
- assure food safety and enhance quality of aquaculture products through innovative processing technologies and new product development recognising the informal sector.

2.12 VALUE CHAIN ROUNDTABLES/NETWORKS

Fragmented consultation by industry bodies led to the government taking the initiative of establishing commodity value-chain round tables or networks (VCRTs) that involve participation from across the value chain. The main aim is to build a strengthened industry-government partnership and minimise the fragmented consultation by industrial bod-

ies. Value-chain round tables provide platforms to jointly implement initiatives in the areas such as food safety and quality, the environment, innovation, market access, regulations and others. They also help to identify enduring competitive advantages for all players and how best to utilise this for the benefit of the subsectors or commodities concerned.

A commodity value-chain round table typically consists of representatives of producers, processors, distributors, retailers, traders, input suppliers, researchers, government agencies, national and provincial governments, etc. Commodity round tables bring together people who do not always have mutual interests and permit them to establish business contacts, improve business linkages and possibly identify the advantages of working together. In South Africa, however, it should be cautioned that this type of associations and meetings should not be construed by competition authorities to constitute uncompetitive and collusive behaviour. Another key reason behind the establishment of VCRTs is to provide an opportunity for industry-led solutions to industry identified problems/constraints with discussions being country focused and not company focused. The VCRTs also provide an opportunity for the government to consult with industry on various issues relating to policy development, commodity strategies, legislative reviews and other key issues and vice versa.

A concept document on VCRTs has been developed by the Directorate: Marketing and approved by the department for implementation. The objectives of the VCRTs are therefore to:

- create a platform to address key industry challenges and constraints and utilise opportunities for the benefit of the sector or subsector;
- set goals and targets which, if achieved, will strengthen the sector's competitive position and enhance South Africa's overall capacity to meet the changing demands of both domestic and international markets;
- build the maximum degree of agreement possible on the development and implementation of coordinated action plans to achieve set goals and targets;
- track progress on implementation of agreed actions and thereby ensure results;
- develop and implement strategies and initiatives aimed at securing and utilising the country's competitive advantage;
- enhance the country's competitiveness and participation in the global market place;
- provide input to the development and implementation of government's agriculture, forestry and fisheries policy, in particular pertaining to international trade, food safety, traceability, science and innovation; and
- allow round tables to develop mechanisms to collaborate with other sector round tables to address mutual issues and priorities.

The concept document also contains all details relating to the functioning, funding, benefits as well as roles and responsibilities of different stakeholders comprising a VCRT.

2.13 EXPORT MARKET DEVELOPMENT AND PROMOTION

It is critical to emphasise that one of the major functions of the former control agricultural boards was export promotion and administration. After the abolition of the control boards, the functions of export market identification, servicing and coordination have been taken over by individual exporters (mainly export agents). Consequently, market access by smallholder producers has been and continues to be limited. Smallholder producers are increasingly finding it difficult to export their produce to international markets owing to, among other things, low production volumes, lack of skills and resources to identify and service these markets, stringent product safety and quality standards, etc. A major factor contributing to the failure of smallholder producers to export their produce has been identified as lack of financial resources to promote their produce in international markets.

In response to this challenge, the Department of Trade and Industry (dti) developed and implemented an Export Marketing and Investment Assistance Scheme (EMIA). This scheme develops export markets for South African products and services and recruits new foreign direct investment (FDI) into the country. The objectives of EMIA are to:

- provide marketing assistance to develop new export markets and grow existing export markets;
- assist with the identification of new export markets through market research;
- assist companies to increase their competitive advantage by supporting patent registrations, quality marks and product marks;

- assist with facilitation to grow FDI through missions and FDI research; and
- increase the contribution of black-owned businesses and SMMEs to South Africa's economy.

As it can be observed, the focus of EMIA is broad. With respect to export promotion, the EMIA helps companies with costs for transportation of samples, rental of exhibition space, construction of stands, interpretation fees, internet connection, telephones, subsistence allowance, return economy-class airfare; and exhibition fees up to a certain maximum. The EMIA accommodates all products produced in the South African economy, with emphasis on targeted sectors of the economy. As a result the scheme faces a number of challenges, including equal assistance to all targeted economic sectors, budget and human resources constraints, macro-constraints, etc. The agriculture, forestry, and fisheries sector is identified in the New Growth Path (NGP), the National Development Plan (NDP) and the Industrial Policy Action Plan (IPAP) as one of the main sectors for economic growth and job creation in South Africa. The sector therefore requires specialised and focused support if it is to fulfil its critical mandate.

The Department of Agriculture, Forestry and Fisheries will, in collaboration with producers, the dti, the NAMC, commodity associations, industry trusts, private sector companies and other relevant stakeholders, develop and implement an export market development and promotion (EMDP) programme aimed at the creation, expansion and maintenance of foreign markets for South African agricultural, forestry and fisheries products. In addition to the objectives of the EMIA, the programme will aim to:

- provide matching funds to South African smallholder commodity-specific organisations for overseas marketing and promotional activities such as trade shows, market research and intelligence, consumer awareness promotions, technical capacity building for smallholder producers and exporters, as well as seminars and webinars to educate foreign consumers about South African agriculture, forestry and fisheries products;
- assist South African smallholder producers and companies with funds for projects that address sanitary, phytosanitary and other technical and non-tariff barriers that prohibit or limit the exports of products produced by South African smallholder producers and companies; and
- support development of new and existing markets for aquaculture products.

The EMDP programme will be funded through statutory levies (where such levies exist), funds from industry trusts (where such trusts exist), as well as funds budgeted for this purpose from various sources. The programme will be administered jointly by the Directorate: International Trade within the Department of Agriculture, Forestry and Fisheries and the NAMC.

2.14 MARKETING RISK MANAGEMENT

Marketing risks refer to risks associated with product losses or product quality losses from the time a product is harvested by a producer until it is sold by the producer and/or first-level processor. Marketing risk mainly relates to an exposure to uncertainty about commodity prices. Marketing risks differ from production risks in that the former relate to finished products while the latter relate to products that are still in the production phase. The agriculture, forestry and fisheries sector is characterised by unique features that distinguish it from other sectors of the economy. These features include low profitability and higher risks of on-farm investments such as weather and pest infestations, uncertainty in input and output prices in markets, poor and limited storage facilities, lack of value-adding facilities, expensive transportation owing to product bulkiness, accidents owing to poor roads and limited availability of conventional collateral that smallholder producers can offer. These features invariably deter private sector investment in the marketing of agriculture, forestry and fisheries products in the absence of adequate safeguards, which, in turn, adversely affect productivity and performance of these products.

Marketing risk largely concerns price risk and the availability of markets. Price risk involves the volatility of product or input prices while market availability involves loss of market access owing to competition or other factors. The main sources of market risks affecting agricultural, forestry and fisheries products are price volatility, deterioration in product quality, product destruction and costs associated with product storage. It is critical to note that a large volume of agriculture, forestry and fisheries products is lost as a result of lack of post-harvest handling facilities. It is also important to note that the majority of smallholder producers do not have the ability to purchase private sector insurance products to protect their produce against market risks. The available market risk management tools can only be afforded by some of the large commercial producers.

To counter market risks facing especially smallholder producers, the Directorate: Marketing proposes the establishment of a Market Risks Management (MRM) Programme within the Department of Agriculture, Forestry and Fisheries which will assist smallholder producers and first-level processors in managing income losses resulting from price risk, product losses and availability of markets. The specific objectives of the MRM Programme are as follows:

- to provide for a low-cost, subsidised and affordable insurance scheme to cover market risks associated with agriculture, forestry and fisheries products;
- to develop, implement and promote market risk management strategies such as contract production, franchising, forward selling, future markets, price hedging, etc., in the marketing of agricultural, forestry and fisheries products; and
- to provide for public-private partnerships in the research, development and provision of appropriate market risk instruments for agriculture, forestry and fisheries products.

The MRM Programme will be funded through producer/client premiums as well as funds budgeted for this purpose from various sources.

2.15 MARKETING ASSISTANCE SCHEME

Although marketing has been incorporated as one of the Comprehensive Agricultural Support Programme (CASP) pillars, the evidence has proven that there has not been any consistent approach in directing CASP funding towards marketing activities. Furthermore, there are no dedicated funding mechanisms to fund marketing programmes within the forestry and fisheries subsectors. As already indicated, an efficient marketing system for agricultural, forestry and fisheries products is critical for the development, commercialisation and growth of smallholder producers.

The implementation of the abovementioned marketing programmes will require additional public financial resources. The Directorate Marketing has proposed the establishment of a Marketing Assistance Scheme which will assist in the implementation of the various marketing support programmes. The concept document for the Marketing Assistance Scheme has since been approved by the department. The scheme will also be used to co-invest with the private sector in the implementation of the various programmes within the marketing strategy.

The Marketing Assistance Scheme is a multipurpose marketing financing programme aimed at enabling producers and other direct stakeholders to develop or widen marketing activities including, but not limited to, the construction or purchasing of any agricultural, forestry or fisheries marketing infrastructure such as silos, processing plants, fish storage facilities and processing equipment and facilities. The specific objectives of the scheme are as follows:

- to finance investment in first-level processing facilities for smallholder producers;
- to finance the establishment of marketing infrastructure in support of marketing cooperative institutions and commodity groups among smallholder producers;
- to finance the refurbishment of dilapidated marketing infrastructure;
- to finance the implementation of the marketing skills development and capacity-building programme;
- to provide information and communication technology (ICT) infrastructure support so that marketing information can be collected and disseminated;
- to finance feasibility studies and development of business plans for implementing the marketing infrastructure programme;
- to co-fund the establishment of logistics support services for smallholder producers;
- to co-fund the establishment of a multidisciplinary National Logistics Centre (NLC) that will ensure that specific logistics requirements in agricultural, forestry and fisheries supply chains are addressed;
- to support a programme of linking producers to markets through trade shows/exhibitions, mentorship programmes, supply contracts, certification, etc.;
- to make provision for donor funding from various donor agencies and governments;
- to co-fund a programme of market research and intelligence;
- to co-fund an export promotion and market development programme for agricultural, forestry and fisheries products;

- to co-fund a market risk/insurance programme for agricultural, forestry and fisheries products; and
- to co-fund the costs associated with certification and compliance to food safety and quality standards for small-holder producers.

3. Other financing mechanisms

In implementing the provisions of this marketing strategy the department will require additional public financial resources in the absence of dedicated funding for the Marketing Assistance Scheme. A multi-pronged approach will therefore be followed to finance the provisions of the strategy:

- The provincial departments responsible for agriculture, forestry and fisheries will be encouraged and assisted to utilise the funds allocated for marketing in the CASP pillar to implement the strategy.
- In the medium to long term, opportunities for matching funds from industries in the form of trust funds residing within the various industry trusts will be explored to leverage public financial resources.
- Other funding options from any other Development Finance Institutions (DFIs) such as the Industrial Development Corporation (IDC), the Land Bank and the Development Bank of Southern Africa (DBSA) will be utilised to leverage public financial resources.
- The AgriBEE Fund will be considered as another funding mechanism in implementing the strategy.
- Provincial departments are encouraged to develop their own funding programmes based on the Marketing Assistance Scheme.

Additionally, the private sector in agriculture, forestry and fisheries is also encouraged to form partnerships with the government in availing resources to leverage public resources to ensure implementation of the provisions of this strategy.

The Directorate: Marketing will, on an annual basis, consult with the provincial departments responsible for agriculture, forestry and fisheries through the Marketing Forum, at least six months before the end of the financial year to facilitate operationalisation of the provisions of the strategy.

4. Roles and responsibilities

The implementation of a strategy of this magnitude requires extensive support and participation by key stakeholders in a partnership formation to leverage state and private sector resources. The Department of Agriculture, Forestry and Fisheries has taken the initiative of developing the strategy framework and it is expected that provinces, in partnership with local municipalities, producers and the private sector, will formulate project-specific implementation plans based on the approved strategy. In summary, the roles and responsibilities of the key partners are as follows:

4.1 DEPARTMENT OF AGRICULTURE, FORESTRY AND FISHERIES

As the lead department in the marketing of agricultural, forestry and fisheries products, the Department of Agriculture, Forestry and Fisheries will, in collaboration with other state departments: –

- ensure participation by all provinces and relevant stakeholders in the implementation of the strategy;
- review the strategy on an on-going basis, depending on changes in the environment and on the requirements of the provinces, producers and other stakeholders;
- establish the Marketing Assistance Scheme to support the implementation of the various marketing support programmes;
- expand the marketing information system in collaboration with provincial departments of agriculture (PDAs) and other role players;
- facilitate access to marketing information platforms residing with the various industry organisations;
- develop and disseminate marketing information in the form of market value-chain profiles and quarterly market outlook bulletins;

- administer the permit allocation system for rebate permit applications;
- facilitate the identification of aquaculture and forestry development zones and the establishment of relevant marketing infrastructure;
- facilitate the establishment of VCRTs/networks to foster government-industry collaboration;
- facilitate the development of a reliable, efficient and affordable programme for managing marketing risks for agriculture, forestry and fisheries products; and
- develop and implement a credible programme to assist smallholder producers to meet product safety and quality standards; and
- monitor and evaluate the implementation of this strategy;

4.2 PROVINCIAL DEPARTMENTS OF AGRICULTURE

Considering that provinces are the delivery points of the government, the following roles and responsibilities will be allocated to relevant provincial departments:

- interpreting, internalising and popularising the strategy among the key stakeholders to expedite implementation;
- contributing towards the development and review of the strategy;
- customising the marketing support programmes in the strategy to regional conditions to ensure implementation;
- incorporating the provisions of the strategy into their annual performance plans and operational plans;
- mobilising supplementary resources to leverage the available public resources;
- facilitating the establishment and/or strengthening of marketing cooperatives;
- providing mentorship, leadership and management advice for marketing cooperatives;
- facilitating the identification of aquaculture and forestry development zones and the establishment of relevant marketing infrastructure;
- implementing a credible programme to assist smallholder producers to meet product safety and quality standards;
- facilitating the formation of commodity groups among smallholder producers in collaboration with organised industry organisations;
- continuously investigating marketing infrastructure gaps experienced by producers in collaboration with the national department and industry bodies;
- establishing and/or revitalising marketing infrastructure;
- providing the infrastructure and resources required to expand the MIS;
- implementing the marketing skills development programme for various commodities in collaboration with the national department;
- implementing a programme of linking producers to markets in collaboration with commodity groups;
- in collaboration with the national department and the private sector, identify development zones/hubs that require shared marketing infrastructure;
- undertaking continuous monitoring and evaluation to assess the impact of the strategy on beneficiaries; and
- writing progress reports to evaluate the effectiveness of the strategy.

4.3 THE PRIVATE SECTOR

While government has a role in ensuring availability and access to publicly owned resources, the private sector has an equal responsibility to leverage government resources through public-private partnerships. The specific role of the private sector in the implementation of the marketing strategy may be summarised as follows:

- to assist the department in the identification of development zones/hubs that will require shared marketing infrastructure;

- to collaborate with the department in the establishment of marketing cooperatives and collection depots;
- to collaborate with the department in implementing the Marketing Skills Development Programme;
- to collaborate with the department in developing and implementing a credible programme of linking producers to markets; and
- to co-fund the implementation of the various programmes of this strategy.

4.4 PRODUCERS, ORGANISED INDUSTRY ORGANISATIONS AND OTHER COOPERATING PARTIES

Producers, organised industry organisations and other cooperating parties are expected to: –

- provide guidance and support for the departments with regard to the implementation of all the marketing support programmes;
- participate actively in and utilise all the support programmes implemented by the state;
- produce sufficient quantities of agricultural, forestry and fisheries products to justify the need for marketing support services;
- initiate the formation of commodity associations and marketing cooperatives among smallholder producers in partnership with relevant provincial and local departments;
- assist the national Department of Agriculture, Forestry and Fisheries as well as relevant provincial departments in the medium to long term in integrating commodity associations among smallholder producers with the mainstream commodity associations;
- take ownership of the infrastructure development business plans and the implementation thereof;
- maintain the infrastructure according to set maintenance requirements and ensure their sustainable and efficient use;
- actively participate in the expansion of the MIS;
- assist in identifying agriculture, forestry and fisheries development zones/hubs that require shared market infrastructure and support;
- provide market information for populating the marketing information system;
- actively participate in the establishment and functioning of VCRTs/networks;
- utilise the market risk management programme and adopt other market risk management strategies; and
- actively participate in marketing campaigns under the export market development and promotion programme.

4.5 DEPARTMENT OF TRANSPORT

The Department of Transport (DoT) collaborates with the national Department of Agriculture, Forestry and Fisheries in implementing the agro-logistics strategy.

4.6 DEPARTMENT OF TRADE AND INDUSTRY

The Department of Trade and Industry is expected to: –

- act as lead trade negotiator in the application of trade policy and take cognisance of the sensitive nature of the sector in trade negotiations;
- apply competition legislation in collaboration with the national Department of Agriculture, Forestry and Fisheries, to monitor the impact of market concentration on efficient performance of agricultural, forestry and fisheries markets;

- co-fund the export market development and promotion programme to create export opportunities and increase exposure of foreign consumers for South Africa's agriculture, forestry and fisheries products;
- apply the provisions of the Agricultural Tariff Policy through the International Trade Administration Commission (ITAC) to ensure reasonable levels of protection against unfair external competition for domestic producers; and
- ensure that investment is channelled to the identified sectors in agriculture, forestry and fisheries.

4.7 STATISTICS SOUTH AFRICA

Statistics South Africa continuously provides support in the monitoring of food prices, input costs and food-processing costs.

4.8 DEVELOPMENT FINANCE INSTITUTIONS

Development Finance Institutions (DFIs): –

- make available financial resources towards the implementation of the various programmes in this strategy;
- serve as efficient disbursement institutions for financial resources from the state;
- develop innovative financial instruments in support of the objectives of this strategy and related government objectives; and
- promote and participate in public-private and joint investments.

4.9 NATIONAL AGRICULTURAL MARKETING COUNCIL

The NAMC is expected to:

- direct the development and implementation of a credible programme of market research for agricultural, forestry and fisheries products to enhance competitiveness, value addition and future positioning in markets;
- guide the optimum utilisation of statutory measures in the development of different industries within the agriculture, forestry and fisheries sector, with particular emphasis on activities that promote the development of smallholder producers;
- guide the effective functioning of agriculture, forestry and fisheries industry trusts to ensure that their activities are development-oriented; and
- create export opportunities and increased exposure of foreign consumers for South Africa's agriculture, forestry and fisheries products (trade promotion/support).

4.10 MARKETING FORUM

The Marketing Forum chaired by the Directorate: Marketing is composed of deputy directors and agricultural economists responsible for marketing services from the nine PDAs and relevant directorates from the national department.

The Marketing Forum as a subcommittee of the Agricultural Economics Working Group (AEWG) will be responsible for implementation of the strategy in the following ways:

- operationalising implementation of the strategy and its provisions;
- serving as a platform for reporting and reviewing progress regarding the implementation of the strategy; and
- exchange experiences and best practices, as well as share lessons on best practices in implementing the strategy.

5. Implementation plan

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all.	Commodity groups/associations	Establish commodity associations among smallholder producers.	Facilitate formation of commodity associations among smallholder producers.	Commodity associations established.	The number of commodity associations formed The usefulness of commodity associations formed	Producers; Directorates of agricultural economics in the nine provinces; Directorate: CED; Industry associations; Private sector
		Link the newly formed regional associations with the national associations.	Develop and implement an integration model with the existing commodity associations.	Integration model	Approved integration model	Directorate: CED; Directorates of agricultural economics in the nine provinces; Producers; Industry associations
		Facilitate inclusive representation into the existing mainstream commodity associations.	Facilitate meetings between associations of smallholder producers and mainstream commodity associations.	Smallholder associations integrated into mainstream associations.	Degree/level of integration	Relevant provincial departments Directorate: CED; Smallholder associations; Mainstream commodity associations

Outcome/s	Key priority area:	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all. Decent employment through inclusive economic growth.	Marketing Cooperatives	Link smallholder producers to markets.	Establish and strengthen marketing cooperatives with the requisite marketing infrastructure.	Marketing cooperatives established.	The number of marketing cooperatives formed. The usefulness of the marketing cooperatives formed.	Producers; Directorate: CED; Relevant provincial departments; Private sector companies; dti; Directorate Marketing.
			Provide training, mentorship, leadership and management advice on marketing cooperatives.	Reports on mentorship/training/ management advice provided.	Number of reports on mentorship provided. Number of reports on training provided. Impact of the mentorship, training and advice provided.	Producers; Directorate: CED; Private sector companies, Service providers; Mentors; Relevant provincial departments.

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
An efficient, competitive and responsive economic infrastructure network. Vibrant, equitable and sustainable rural communities with food security for all.	Marketing Infrastructure	Facilitate marketing, trade and transformation of raw agricultural, forestry and fisheries products into value added products.	Continuously investigate marketing infrastructure gaps experienced by producers. Establish and/or revitalise marketing infrastructure.	Reports on marketing infrastructure gaps from all nine provinces Functional marketing infrastructure units	Number of business plans (developed and implemented) to bridge infrastructure gaps Number of investigation reports Number of functional marketing infrastructure units established	Producers; Relevant provincial departments; Industry organisations; Directorate: Marketing; Development Finance Institutions; Private sector companies Producers; Relevant provincial departments; Industry organisations; Directorate: Marketing; Development Finance Institutions; Private sector companies Producers; Relevant provincial departments; Industry organisations; Directorate: Marketing; Private sector companies
An efficient, competitive and responsive economic infrastructure network.	Agro-logistics	Facilitate efficient flow of agricultural, forestry and fisheries products.	Facilitate implementation of the logistics strategy and model.	Efficient agricultural, forestry and fisheries marketing value chains	Effective and efficient logistical services to value chain players	Directorate: Agro-processing Support; Department of Transport; Department of Public Enterprises; Transnet Freight Rail; Industry organisations; Relevant provincial departments

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
An efficient, competitive and responsive economic infrastructure network.	Marketing Information	Provide market information for producers and the entire agricultural, forestry and fisheries sector for efficient functioning of markets and to enhance market access.	Expanding the MIS and providing the infrastructure in the provinces Facilitate access to information platforms residing with agricultural, forestry and fisheries industries. Developing and disseminating agricultural, forestry and fisheries marketing value chain profiles. Developing and disseminating quarterly market outlook bulletins for agricultural, forestry and fisheries products.	MIS Information platforms formed Publications on agricultural, forestry and fisheries marketing value chain profiles developed Quarterly market reports	MIS linkages to electronic and print media Usefulness of the information platforms Number of commodity profiles developed and published Usefulness of Commodity profiles developed and published Number of reports published quarterly Usefulness of reports published quarterly	Directorates: Marketing, Fresh produce markets; Industry organisations; Relevant provincial departments Directorates: Marketing, Fresh produce markets; Industry organisations; Relevant provincial departments Directorates: Marketing, Fresh produce markets; Industry organisations; Relevant provincial departments Directorates: Marketing, Fresh produce markets; Industry organisations; Relevant provincial departments

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Skilled and capable workforce to support an inclusive economic growth.	Marketing skills development	<p>Helping producers to better understand the mechanisms of agricultural, forestry and fisheries marketing.</p> <p>Helping producers to better plan production and marketing activities according to market requirements and to participate effectively in markets.</p>	<p>Facilitating development of agricultural, forestry and fisheries marketing skills training manuals.</p> <p>Liaising with development institutes/colleges and commodity associations to offer agricultural, forestry and fisheries marketing skills.</p> <p>Implementing marketing skills programmes for key agricultural, forestry and fisheries commodities and according to need.</p>	<p>Accredited marketing skills training manuals.</p> <p>Mou/Programme with development institutes/ colleges.</p> <p>Status report on marketing skills training programmes.</p>	<p>Number of marketing skills training manuals developed.</p> <p>Relevance of marketing skills training manuals developed.</p> <p>Approved MoU and skills development programme.</p> <p>Number of producers skilled in agricultural, forestry and fisheries marketing.</p> <p>Effectiveness of marketing skills development programmes.</p> <p>Relevance of the marketing skills development programmes.</p>	<p>Producers; Directorate: Marketing; Training institutions and service providers; Industry organisations; Relevant provincial departments.</p> <p>Training institutions, Producers; Directorate: Marketing; Service providers; Industry organisations; Relevant provincial departments.</p> <p>Producers; Directorate: Marketing; Training institutions and service providers; Industry organisations; Relevant provincial departments.</p>

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all.	Market research and market intelligence	Enhancing competitiveness and future positioning in agricultural, forestry and fisheries markets globally.	Conducting demand and opportunity directed technical research on agricultural, forestry and fisheries markets, including commissioned research from the agricultural, forestry and fisheries industry.	Marketing research reports and/or publications.	Number of marketing research reports.	NAMC; Other relevant research institutions; industry organisations.
Skilled and capable workforce to support an inclusive economic growth.				Market intelligence studies.	Relevance of marketing research reports to industry and other players. Usefulness of marketing research reports to industry.	Directorate International Trade

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all.	Market linkages	Administering trade measures and agreements and providing support for agricultural, forestry and fisheries exporters.	Develop procedures to apply for rebate permits. Issue market access permits.	Brochure of application procedures. Approved market access permits	Approved brochure with application procedures. Approved market access permits; Number and extent of market access permits utilised	Directorate: Marketing Directorate: Marketing
Decent employment through inclusive economic growth.			Develop and implement a programme of linking producers to markets.	Linking producers to markets programme.	Number of producers or producer group linked to markets.	Producers; Directorate: Marketing; Relevant provincial departments; Industry organisations; Local and foreign retailers; Institutional buyers; Fresh produce markets; Processors
			Investigate and publish procurement requirements for various markets.	Brochures on procurement requirements.	Number and usefulness of brochures published.	Directorate: Marketing

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all. Decent employment through inclusive growth.	Competition and pricing	Monitor the impact of market concentration on the efficient performance of agricultural, forestry and fisheries markets. Monitor trends in food prices, food processing costs and farm-to-retail price spreads.	Applying competition legislation under the Competition Commission to address any problem that may arise. Collecting retail price data, conducting analysis and writing reports.	Reports of investigations into the conduct of particular market participants. Quarterly food price trends reports.	Number of reports Usefulness of reports Published food price trends reports. Disseminated food price trends reports.	Competition Commission of the Department of Trade and Industry NAMC Statistics South Africa; Relevant provincial departments.
Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all. Decent employment through inclusive growth.	Agricultural, forestry and fisheries tariffs	Providing protection against unfair external competition. Enhancing competitiveness through trade-based mechanisms.	Applying the provisions of the tariff policy to ensure reasonable levels of protection for domestic producers.	Revised tariff levels for agricultural, forestry and fisheries products.	Number of revised tariff levels and other trade remedies. Number of implemented tariff levels.	International Trade Administration Commission (ITAC) of the dti; Directorate: Marketing; NAMC

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all.	Statutory measures	Promoting efficient and effective utilisation of statutory measures to enhance industry competitiveness.	Develop requests for establishment, repeal or continuation of statutory measures.	Formal requests from industry.	Number of requests developed and lodged.	Producers; Industry organisations; NAMC
			Evaluation and investigation of the requested statutory measure/s.	Investigation report/s	Number of investigations concluded.	NAMC; Directorate: Marketing
			Facilitate approval and gazetting of the statutory measure/s.	Approved statutory measure/s, Register of DAG, data on records and returns and approved levies.	Gazette notice/s, Industry information and statistics, levies.	Producers; Industry organisations; NAMC
			Implementation of the statutory measure/s.	Status report	Number of status reports developed per annum.	NAMC
Vibrant, equitable and sustainable rural communities with food security for all.	Industry trusts	Promoting the efficient use of industry trust funds to support smallholder producers.	Facilitate appointment of trustees to various industry trusts.	Effective boards of trustees for all trusts.	Approved appointments for trustees.	Relevant industry trusts; NAMC
			Manage reporting mechanisms between the industry trusts and the Minister.	Reports on operations of trusts.	Annual reports on operations of industry trusts.	Relevant industry trusts; NAMC
			Monitor utilisation of industry trust funds.		Annual reports on utilisation of industry trust funds.	

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all. Environmental assets and natural resources that are well protected and continually enhanced.	Product safety and quality standards	Enhancing the capacity of smallholder producers to meet product safety and quality standards. Ensure adherence to Forestry Stewardship Council and Principles, Criteria, Indicators and Standards (PCIS).	Developing a guideline document for smallholder producers to meet product safety and quality standards. Developing training manuals and providing training for registration, accreditation, testing, and monitoring product safety and quality standards. Developing a guideline document for producers to comply with product safety and quality standards.	Guideline document Accredited training manuals. Status report on training provided to smallholder producers. Producers compliance	Approved guideline document. Effectiveness and relevance of training provided to smallholder producers Increase in number of producers complying with product safety and quality standards.	Directorates: Marketing, Food Safety and Quality Assurance Directorates: Marketing, Food Safety and Quality Assurance, Agricultural Inputs Control, Food Import and Export Standards; PPECB; Department of Health; Private certification bodies; Service providers Directorates: Small Scale Forestry, Commercial Forestry

Outcome /s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all. Environmental assets and natural resources that are well protected and continually enhanced.	VCRTs/ networks	Fostering industry-government collaboration that helps to secure an enduring global competitive advantage.	Facilitating the establishment of value chain roundtables/ Networks. Facilitating sittings of the VCRTs/networks. Reporting on the activities of the roundtables.	Established VCRTs/ networks. Meeting schedules, Minutes of the meetings. Records of decisions. Reports to Minister.	Number, relevance and effectiveness of VCRTs/ networks established. Approved meeting schedule/s. Approved minutes of the meetings. Approved record/s of decisions. Biannual reports to the Minister and departmental management.	Producers; Industry organisations; Relevant provincial departments; Relevant DAFF directorates; dfti; Processors, Retailers; Regulatory bodies; Research Institutions; etc. Directorate: Marketing, DDGEDIM

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all. Decent employment through inclusive economic growth.	Export market development and promotion	Creating export opportunities and increased exposure of foreign consumers for South Africa's agriculture, forestry and fisheries products.	Developing the EMDP Programme. Developing brochure, application procedures and guidelines for the programme.	EMDP Programme document Brochure with application procedures and guidelines.	Approved EMDP Programme Approved brochure with application procedures and guidelines.	Directorate: International Trade; NAMC; private sector Directorate: International Trade; NAMC

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Role players
Vibrant, equitable and sustainable rural communities with food security for all.	Marketing risks management	Mitigate against post-harvest losses and other marketing risks	Developing the MRM Programme Developing brochure, application procedures and guidelines	MRM Programme document Brochure with application procedures and guidelines	Approved MRM Programme Approved brochure with application procedures and guidelines	Directorates: Marketing; Relevant provincial departments Directorates: Marketing

Outcome/s	Key priority area	Goals	Activities	Output	Indicators	Responsibility
Vibrant, equitable and sustainable rural communities with food security for all. Decent employment through inclusive economic growth. An efficient, competitive and responsive economic infrastructure network.	Marketing Assistance Scheme	Supporting smallholder producers and entrepreneurs in coordinating marketing activities.	Establishing Marketing Assistance Scheme. Developing brochure, application procedures and guidelines for the assistance scheme.	Progress report on the establishment of marketing assistance scheme. Brochure with application procedures and guidelines.	An approved marketing assistance scheme. Usefulness of the marketing assistance scheme. Approved brochure with application procedures and guidelines. Approved guideline document. Approved brochure . Approved application forms for the scheme.	Directorate: Marketing; Development Finance institutions; CD; Development Finance CASP; National Treasury Directorate: Marketing

6. Reporting mechanisms

The following reporting framework shall be used by all affected stakeholders on an annual basis to track progress regarding implementation of the strategy. Reporting shall be tabled to the AEWG through the Marketing Forum.

Item	Key priority area	Objectively verifiable indicators (OVIs)	Target	Actual achievement	Challenges	Corrective action/ measures	Budgeted amount	Budget spent
1.	Commodity associations/ Groups	Number of commodity groups/associations formed						
		Usefulness ¹ of commodity associations/groups established						
		Integration Model						
		Degree and level ² of integration with main- stream associations						
2.	Marketing cooperatives	The number of marketing cooperatives formed						
		Usefulness ³ of marketing cooperatives to members						
		Number of reports on mentorship provided						
		Number of reports on training provided						
3.	Marketing infrastructure	Impact ⁴ of mentorship/training/advice provided to members						
		Implementation ⁵ of business plan/s developed and implemented to bridge infrastructure gaps						
		Number of investigation reports						
		Number of functional marketing infrastructure units established						
4.	Agro-logistics	Number and extent ⁶ of use of agriculture, forestry and fisheries development hubs/zones						
		Effective and efficient logistical services to value-chain players						

Item	Key priority area	Objectively verifiable indicators (OVIs)	Target	Actual achievement	Challenges	Corrective action/ measures	Budgeted amount	Budget spent
5.	Marketing information	MIS linkages to electronic and print media						
		Usefulness ⁷ of the information platforms						
		Number of commodity profiles developed and published						
		Usefulness ⁸ of commodity profiles developed and published						
		Number of reports published quarterly						
		Usefulness of reports published quarterly						
6.	Marketing skills development	Number of marketing skills training manuals developed						
		Relevance ⁷ of marketing skills training manuals developed						
		Number of reports on mentorship provided						
		Number of reports on training provided						
		Impact ⁴ of mentorship/training/advice provided to members						
		Implementation ⁵ of business plan/s developed and implemented to bridge infrastructure gaps						
7.	Marketing infrastructure	Number of investigation reports						
		Number of functional marketing infrastructure units established						
		Number and extent ⁶ of use of agriculture, forestry and fisheries development hubs/zones						
8.	Agro-logistics	Effective and efficient logistical services to value-chain players						

Item	Key priority area	Objectively verifiable indicators (OVIs)	Target	Actual achievement	Challenges	Corrective action / measures	Budgeted amount	Budget spent
9.	Statutory measures	Number of requests developed and lodged						
		Number of investigations concluded						
		Gazette notice/s						
		Industry information, statistics and levies						
		Number of status reports developed per annum						
10.	Industry trusts	Approved appointments for trustees						
		Annual reports on operations of industry trusts						
		Annual reports on utilisation of industry trust funds						
11.	Product safety and quality standards	Approved guideline document						
		Effectiveness and relevance ¹³ of training provided to smallholder producers						
		Number of producers complying with product safety and quality standards						
12.	Value chain round-tables/networks	Number, relevance and effectiveness of VCRTs/networks established						
		Approved meeting schedule/s						
		Approved minutes of the meetings						
		Approved record/s of decisions						
		Biannual reports to the Minister and departmental management						

Item	Key priority area	Objectively verifiable indicators (OVIs)	Target	Actual achievement	Challenges	Corrective action/ measures	Budgeted amount	Budget spent
13.	Export market development and promotion	Approved EMIDP Programme						
		Approved brochure with application procedures and guidelines						
14.	Marketing risk management	Approved MIRM Programme						
		Approved brochure with application procedures and guidelines						
15.	Marketing Assistance Scheme	An approved Marketing Assistance Scheme						
		Usefulness ¹⁴ of the Marketing Assistance Scheme						
		Approved brochure with application procedures and guidelines						
		Approved guideline document						
		Approved brochure						
		Approved application forms for the scheme						
16	Agricultural, forestry and fisheries tariffs	Number of revised tariff levels or trade remedies						
		Number of implemented tariff levels or trade remedies						
17.	Competition and pricing	Number of reports on competition behaviour						
		Usefulness of reports						
		Published food price trend reports						
		Disseminated food price trend reports						

7. Monitoring and evaluation

The Department of Agriculture, Forestry and Fisheries' directorates of Marketing, Cooperative and Enterprise Development, Agro-processing Support, International Trade, the private sector, industry organisations, producers and the provincial departments responsible for agriculture, forestry, and fisheries as well as the NAMC are directly affected by the marketing strategy and should incorporate its provisions into their strategic and operational plans. Provincial departments responsible for agriculture, forestry, and fisheries should report regularly on progress achieved and constraints experienced in implementing the provisions of the strategy. To facilitate effective monitoring and implementation the Directorate: Organisational Performance will facilitate the monitoring of implementation of this strategy while the Directorate: Marketing shall coordinate the process of monitoring and evaluating the impact of the strategy. The process of monitoring and evaluation of this strategy shall be executed after every five years from the period of implementation. The monitoring and evaluation framework as set out below will provide guidance for this process. Impact evaluation studies will be conducted to assess the impact of the various intervention programmes encapsulated within this strategy.

Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Key objective						
To minimise or eliminate market access constraints experienced by smallholder producers and other value-chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Key marketing support Programme						
Commodity groups/associations						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Establish commodity groups/associations among smallholder producers.	Facilitate formation of commodity groups/ association among smallholder producers.	Commodity associations established	Number of commodity associations formed Usefulness of commodity associations formed	Independent Evaluator/assessor	Once after every five years	Registration certificates/articles of association Member survey on the services from the association
Link the newly established regional associations with national associations.	Develop and implement an integration model with the existing commodity associations.	Integration model	Approved integration model			Reports on the implementation of the approved model and progress
Facilitate inclusive representation into the existing mainstream commodity associations.	Facilitate meetings between associations of smallholder producers and mainstream commodity associations.	Smallholder associations integrated into mainstream associations	Degree/level of integration			Proof of affiliation with mainstream organisations

<p>Outcome 4: Decent employment through inclusive economic growth. Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all.</p>						
<p>Key objective</p> <p>To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing</p>						
<p>Key marketing support programme</p> <p>Marketing cooperatives</p>						
<p>Goals</p> <p>Link smallholder producers to markets.</p>	<p>Activities</p> <p>Establish and strengthen marketing cooperatives with the requisite marketing infrastructure.</p>	<p>Outputs</p> <p>Marketing cooperatives established</p>	<p>Indicators</p> <p>Number of marketing cooperatives established</p> <p>Usefulness of marketing cooperatives established</p>	<p>Responsibility</p> <p>Independent evaluator/assessor</p>	<p>Frequency</p> <p>Once after every five years</p>	<p>Evidence</p> <p>Site visit reports, copies of registration certificates and constitution of a cooperative</p> <p>Reports on service provided</p>
	<p>Provide training, mentorship, leadership and management advice on marketing cooperatives.</p>	<p>Reports on mentorship/training/ management advice provided</p>	<p>Number of reports on mentorship provided</p> <p>Number of reports on training provided</p> <p>Impact of the mentorship, training and advice provided</p>	<p>Mentorship programmes</p> <p>Training programmes</p> <p>Reports on service provided</p>		

<p>Outcome 6: An efficient, competitive and responsive economic infrastructure network. Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all.</p>						
<p>Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing</p>						
<p>Marketing infrastructure</p>						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Facilitate marketing, trade and transformation of raw agricultural, forestry and fisheries products into value-added products.	Continuously investigate marketing infrastructure gaps experienced by producers.	Reports on marketing infrastructure gaps from all nine provinces	Number of business plans (developed and implemented) to bridge infrastructure gaps	Independent evaluator/assessor	Once after every five years	Detailed business plan documents, site visits reports
	Establish and/or revitalise marketing infrastructure.	Functional marketing infrastructure units.	Number of investigation reports			
	Identify agriculture, forestry and fisheries development zones/hubs that require shared marketing infrastructure and support.	Established and resourced agriculture, forestry and fisheries development zones/hubs.	Number and extent of functional marketing infrastructure units established	Number of functional marketing infrastructure units established	Site visit reports	Reports on the degree of use of the marketing infrastructure

<p>Outcome 6: An efficient, competitive and responsive economic infrastructure network</p>						
<p>Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing</p>						
<p>Agro-logistics</p>						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Facilitate an efficient flow of agricultural, forestry and fisheries products.	Facilitate implementation of the logistics strategy and model.	Efficient agricultural, forestry and fisheries marketing value chains	Effective and efficient logistical services to value-chain players	Independent evaluator/assessor	Once after every five years	Survey of value-chain players

Outcome 6: An efficient, competitive and responsive economic infrastructure network						
Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Marketing information						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Provide market information for producers and the entire agricultural, forestry and fisheries sector for efficient functioning of markets and to enhance market access.	Expanding the MIS and providing the infrastructure in the provinces.	Marketing Information System	MIS linkages to electronic and print media	Independent Evaluator/ assessor	Once after every five years	User/client survey
	Facilitate access to information platforms residing with agricultural, forestry and fisheries industries.	Section 21 companies formed	Usefulness of the information platforms			User/client survey
	Developing and disseminating agricultural, forestry and fisheries marketing value chain profiles.	Publications on agricultural, forestry and fisheries market value-chain profiles developed	Number of commodity profiles developed and published			Publications/reports
	Developing and disseminating quarterly market outlook bulletins for agricultural, forestry and fisheries products.	Quarterly market reports	Usefulness of commodity profiles developed and published			User/client survey
			Number of reports published quarterly			Publications/reports
			Usefulness of reports published quarterly			User/client survey

Outcome 5: Skilled and capable workforce to support an inclusive economic growth.							
Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all.							
Key objective							
To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing							
Key marketing support programme							
Market research and market intelligence							
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence	
Enhancing competitiveness and future positioning in agricultural, forestry and fisheries markets globally.	Conducting demand and opportunity directed technical research on agricultural, forestry and fisheries markets, including commissioned research from the agricultural, forestry and fisheries industry.	Marketing research reports and/or publications	Number of marketing research reports	Independent evaluator/ assessor	Once after every five years	Published research reports	
		Market intelligence studies	Relevance of marketing research reports to industry and other players			Industry survey	
			Usefulness of marketing research reports to industry			Industry survey	
Outcome 4: Decent employment through inclusive economic growth.							
Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all.							
Key objective							
To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing							
Key marketing support programme							
Market linkages							
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence	
Administering trade measures and agreements and providing support for agricultural, forestry and fisheries exporters.	Develop procedures to apply for rebate permits.	Brochure of application procedures	Approved brochure with application procedures	Independent evaluator/ assessor	Once after every five years	Approved brochure	
		Issue market access permits.	Approved market access permit			Approved permits	
	Develop and implement a programme of linking producers to markets.	Linking producers to markets programme	Number of market access permits			Number of market access permits	Reports on permit utilisation
		Investigate and publish procurement requirements for retailers, schools, hospitals and correctional facilities.	Brochures on procurement requirements			Number of producers or producer groups linked to markets	Survey on the volume/value of production sold/traded and number of producers linked to markets
			Number and usefulness of brochures published	Client survey reports on the number and usefulness of brochures published			

Outcome 4: Decent employment through inclusive economic growth Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Key marketing support programme Competition and pricing						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Monitor the impact of market concentration on the efficient performance of agricultural, forestry and fisheries markets.	Applying competition legislation under the Competition Commission to address any problem that may arise.	Reports of investigations into the conduct of particular market participants	Number of investigation reports	Independent evaluator/ assessor	Once after every five years	User/client survey
			Usefulness of investigation reports			User/client survey
Monitor trends in food prices, food processing costs and farm-to-retail price spreads.	Collecting retail price data, conducting analysis and writing reports.	Quarterly food price trend reports	Published food price trend reports			Food price monitor reports
			Disseminated food price trend reports			User/client survey

Outcome 4: Decent employment through inclusive economic growth Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Key marketing support programme Agricultural, forestry and fisheries tariffs						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Providing protection against unfair external competition	Applying the provisions of the tariff policy to ensure reasonable levels of protection for domestic producers.	Revised tariff levels for agricultural, forestry and fisheries products	Revised tariff levels for agricultural, forestry and fisheries products	Independent evaluator/ assessor	Once after every five years	Report/survey on revised agricultural, forestry and fisheries tariff levels
Enhancing competitiveness through trade-based mechanisms	Utilising trade remedies (anti-dumping duties, countervailing duties and safeguard measures) to ensure reasonable protection for domestic producers.	Utilised trade remedies for agricultural, forestry and fisheries products	Number of utilised trade remedies for agricultural, forestry and fisheries products			Report/s on utilised trade remedies for agricultural, forestry and fisheries products

Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Statutory measures						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Promoting efficient and effective utilisation of statutory measures to enhance industry competitiveness.	Develop requests for establishment, repeal or continuation of statutory measures.	Formal requests from industry	Number of requests developed and lodged	Independent Evaluator/ assessor	Once after every five years	Approved formal requests/ applications from industry
	Evaluation and investigation of the requested statutory measure/s.	Investigation report/s	Number of investigations concluded			Investigation reports
	Facilitate approval and gazetting of the statutory measure/s.	Approved statutory measure/s	Gazette notice/s	Gazette notice/s		
	Implementation of the statutory measure/s.	Register of DAG, data on records and returns and approved levies	Industry information and statistics, levies.	Industry information and statistics		
	Report on the impact of implemented statutory measures.	Status report	Number of status reports developed per annum	Copies of status reports		

Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Industry trusts						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Promoting the efficient use of industry trust funds to support smallholder producers.	Facilitate the appointment of trustees to various industry trusts.	Effective boards of trustees for all industry trusts	Approved appointments for trustees	Independent evaluator/ assessor	Once after every five years	Appointment letters and submissions
	Manage reporting mechanisms between the industry trusts and the Minister.	Reports on operations of trusts	Annual reports on operations of industry trusts			Annual reports
	Monitor utilisation of industry trust funds.	Financial statements of industry trusts	Audited annual financial statements of industry trusts			Audited financial statements

Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Outcome 10: Environmental assets and natural resources that are well protected and continually enhanced						
Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Product safety and quality standards						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Enhancing the capacity of smallholder producers to meet product safety and quality standards.	Developing a guideline document for smallholder producers to meet product safety and quality standards.	Guideline document	Approved guideline document	Independent Evaluator/ assessor	Once in two years	Approved guideline document
	Developing training manuals and providing training for registration, accreditation, testing and monitoring product safety and quality standards.	Accredited training manuals	Number of accredited training manuals developed and number of smallholder producers trained			Accredited training manuals and lists of smallholder producers trained and accredited
	Status report on training provided to smallholder producers.	Effectiveness and relevance of training provided to smallholder producers	User/client survey			

Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Outcome 10: Environmental assets and natural resources that are well protected and continually enhanced						
Key objective						
To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Value chain round tables/networks						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Fostering industry-government collaboration that helps to secure an enduring global competitive advantage.	Facilitating the establishment of VCRTs/networks	Established value chain round tables/networks	Number, relevance and effectiveness of value chain round tables/networks established	Independent Evaluator/ assessor	Once after every five years	Records of established VCRTs
	Facilitating meetings of the VCRTs/networks	Meeting schedules	Approved meeting schedules			User/client survey
	Reporting on the activities of the VCRTs/networks	Minutes of the sittings	Minutes of the sittings	Approved minutes of the sittings		Approved meeting schedules
		Records of decisions	Records of decisions	Approved records of decisions		Approved minutes of the meetings
	Reports to Minister	Reports to Minister	Annual reports to the Minister and departmental management	Approved records of decisions	Annual reports to the Minister and departmental management	

Outcome 4: Decent employment through inclusive economic growth						
Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Key objective						
To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Export market development and promotion						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Creating export opportunities and increased exposure of foreign for South Africa's agriculture, forestry and fisheries products.	Developing the EMDP Programme.	EMDP Programme document	Approved EMDP Programme	Independent evaluator/ assessor	Once after every five years	Approved EMDP Programme document
	Developing a brochure, application procedures and guidelines for the programme.	Brochure with application procedures and guidelines	Approved brochure with application procedures and guidelines			Published brochure
			Usefulness of the EMDP Programme to the sector			Beneficiary survey

Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all						
Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Marketing risks management						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Mitigate against post-harvest losses and other marketing risks.	Developing the MIRM Programme	MIRM Programme document	Approved MIRM Programme	Independent evaluator/ assessor	Once after every five years	Approved MIRM document
	Developing brochure, application procedures and guidelines.	Brochure with application procedures and guidelines	Approved brochure with application procedures and guidelines Usefulness of the MIRM Programme to the sector			Approved brochure

Outcome 4: Decent employment through inclusive economic growth. Outcome 6: An efficient, competitive and responsive economic infrastructure network. Outcome 7: Vibrant, equitable and sustainable rural communities with food security for all.						
Key objective To minimise or eliminate market access constraints experienced by smallholder producers and other value chain players in both the local and international markets and to lower transaction costs in agricultural, forestry and fisheries marketing						
Marketing Assistance Scheme						
Goals	Activities	Outputs	Indicators	Responsibility	Frequency	Evidence
Supporting smallholder producers and entrepreneurs in coordinating marketing activities.	Establishing Marketing Assistance Scheme.	Progress report on marketing assistance scheme	An approved Marketing Assistance Scheme Usefulness of the Marketing Assistance Scheme	Independent evaluator/ assessor	Once after every five years	Approved Marketing Assistance Scheme document Beneficiary survey, site visit report on the impact of the scheme
	Developing brochure, application. Procedures and guidelines for the assistance scheme.	Brochure with application procedures and guidelines.	Approved brochure with application procedures and guidelines Approved guideline document Approved application forms for the scheme			Published brochure Approved guideline document Approved application forms

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