



National Agricultural
Marketing Council
Promoting market access for South African agriculture

The trumpet

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Trumpeting: Investment Trends in Africa

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This Newsletter and all NAMC research output can be accessed online at: www.namc.co.za/research-portal

Foreword

The Trumpet is an economic research newsletter established for stakeholders to access research outputs of the NAMC. This is the second issue of the economic research newsletter. The newsletter seeks to summarise latest research along with communicating information on recent and upcoming events of interest to our stakeholders. We also profile some of the researchers at NAMC with a view to promoting an interactive culture between the NAMC and the readers of this newsletter. Lastly, snippets of important information and statistics on the agricultural sector locally, regionally and globally are presented. The information sharing will not only be valuable to stakeholders, it will also assist in keeping NAMC employees in the loop about MERC division's activities. This newsletter is available through multiple channels, including email, hard copy, website and social media.

The lead article in this Issue is by NAMC's Communications Head, Majara Monamodi, and looks at the subject of communication in the agricultural sector and poses the question of whether it is adequate. This Issue also features some recent NAMC working papers, conference papers and papers published in journals. A working paper by Lubinga and others finds that on average, a unit increase in levy expenditure on export promotion and market development leads to an increase in exports of the selected products namely, citrus, deciduous fruits, table grapes and wine. Another study by Lubinga and others looks at impact of consumer education expenditure on pork consumption in South Africa. Lekgau and others review international literature and find that intra-Africa trade is lagging behind Africa's trade with other non-continental trading partners. A published journal article by Lubinga and others concludes that the General System of Preferences (GSP) scheme is not effective in enhancing export of asparagus from Kenya, vegetables from Tanzania and bananas from Uganda to the EU. Finally, a conference paper by Nekhavhambe and others assesses the impact of socio-economic characteristics, challenges that farmers face and views of extension officers on transforming subsistence farmers towards commercialization in the Mutale Local Municipality, Vhembe District, South Africa.

For more information on NAMC's economic research publications, go to www.namc.co.za/researchportal.

Happy reading.

S Ngqangweni

Senior Manager: Markets and Economic
Research Centre (MERC)
National Agricultural Marketing Council

Focus

Agricultural Communication; we are stuck!

Majara Monamodi

The SAPoultry's recent passionate plea to save its local market shook the consciousness of the agricultural sector. It bellowed a concern: are South Africans able to distinguish locally produced agricultural products from foreign agricultural products? More importantly, are South African farmers really in charge of feeding us? The turn of events surrounding the poultry question necessitated an immediate introspection by the sector to start sincerely communicating. It is worthy to note that the agricultural sector enjoys tour de force in foreign markets with the disparities between export promotion and local promotion worlds apart.

Just in 2015, the Trade and Investment South Africa (TISA) an agency of DTI spent R49 million on export promotion. Separating agriculture from this basket, agricultural industries such as Hortgro, WOSA, Fruit SA and others assisted government in promoting local produce at export forums and still continue to do so. It explains the weight of agriculture in relation to the economy. In 2016, agriculture contributed around 12% to South Africa's total export earnings at a value of \$9.2 billion.'

At the opposite spectrum, little is recorded or revealed on local agricultural advertisement, marketing and promotion spent. Proudly SA lends credibility with the 'buy-local' campaign yet for a sector that boosted second quarter economic performance in 2017 and plays a major role in the country's socioeconomic landscape, one could argue that more needs to be done.

On the other side of the rainbow, I partially agree with the view as once expressed by my agriculture communication colleague 'why will they need to spend on local promotion'. Probing the discussion further, South Africa has only two notable commercial agriculture magazines available on retail shelves; Farmers Weekly and Landbou Weekblad. Their target audience is established commercial farmers and agribusinesses predominantly white. These are the platforms which agribusinesses choose to spend on advertising and marketing.

In the United States for example, agricultural communication started as far back as 1777. Each decade produced or developed new forms of agricultural communication. By the year 2000, agricultural communication in the US produced 101 agricultural newspapers, 432 magazines, 1,001 AM stations, 745 FM stations, 12 state and 3 regional radio networks, 3 television stations. Investment in education was paramount to ensure its longevity as a sector. Almost all Universities in all states have an undergraduate course in agricultural communication with specialisation in radio, print media, government communications, marketing and branding, social media, stakeholder relations, public relations, investment relations etc.

While it may be unfair to pit South Africa with the US, it is hard to find a dedicated agriculture TV and radio show in RSA. These mild comparisons illustrate how agrarian reform, transformation, development will be slow to achieve if communication programs suitable for all agriculture market participants are not created. Because development and transformation is pursued by government, it will need to lead in this ambit as seen with the DTI/TISA export promotion strategy. In essence, the Department of Agriculture, Forestry and Fisheries will need to create a new localised agency focusing on South Africa's agricultural branding, marketing, media, public relations working in close proximity with Proudly SA, Brand SA, media houses, agricultural bodies and academic institutions in promoting agriculture locally.

The agricultural revolution espoused by the country's politicians should consider this matter of agricultural communication. In observing government agriculture communication, focus is on press releases, events, newsletters to emit messages, announcements and campaigns to the public. This is by default, as communication units are not stand alones but directly report to senior executives who may not have the time to dedicate to communication. This limits space for creativity and exploring ways to better communicate government programmes. An agricultural communication revolution is needed to ensure we are not forever stuck with regards to communicating the beautiful prospects of agriculture.



World Trade Organisation Ministerial:

Overview of the Issues and outcomes

Stephanie van der Walt

The eleventh Ministerial Conference (MC11) of the World Trade Organisation (WTO) was held in Buenos Aires, Argentina, from 11 to 14 December 2017. The Ministerial Conference is the highest decision-making body within the Organisation and was attended by delegates of the 164 countries which are members of the WTO, as well as a number of observer countries. South Africa was represented by Minister Rob Davies of the Department of Trade and Industry, Minister Senzeni Zokwana, Minister of Agriculture, Forestry and Fisheries and Deputy Minister of Trade and Industry, Gratitude Magwanishe.

MC11 deviated from the traditional approach insofar as issues were tabled at the Conference, instead of limited to a pre-approved agenda of topics. Prior to the Conference, the South African delegation briefed stakeholders of core issues of importance to South Africa. With regard to agriculture, a broad range of topics were highlighted, i.e. E-commerce, Fisheries subsidies, Investment facilitation, and Domestic regulation.

South Africa is not a demandeur in any of these issues, however, negotiations were approached from the vantage of protecting South Africa's existing and future interests. Upon returning to South Africa, Minister Davies said that there were no substantial outcomes at MC11 and no consensus could be reached on a ministerial declaration. The Ministerial Conference ended with a Chair's summary of proceedings. There were agreements to secure a deal on elimination of fisheries subsidies by the next ministerial in December 2019. The other decision at MC11 was on e-commerce where it was agreed to continue with the current e-commerce work

programme and that member states will endeavour to reinvigorate the work. Another key decision was the establishment of a Working Party for the accession negotiations of South Sudan.

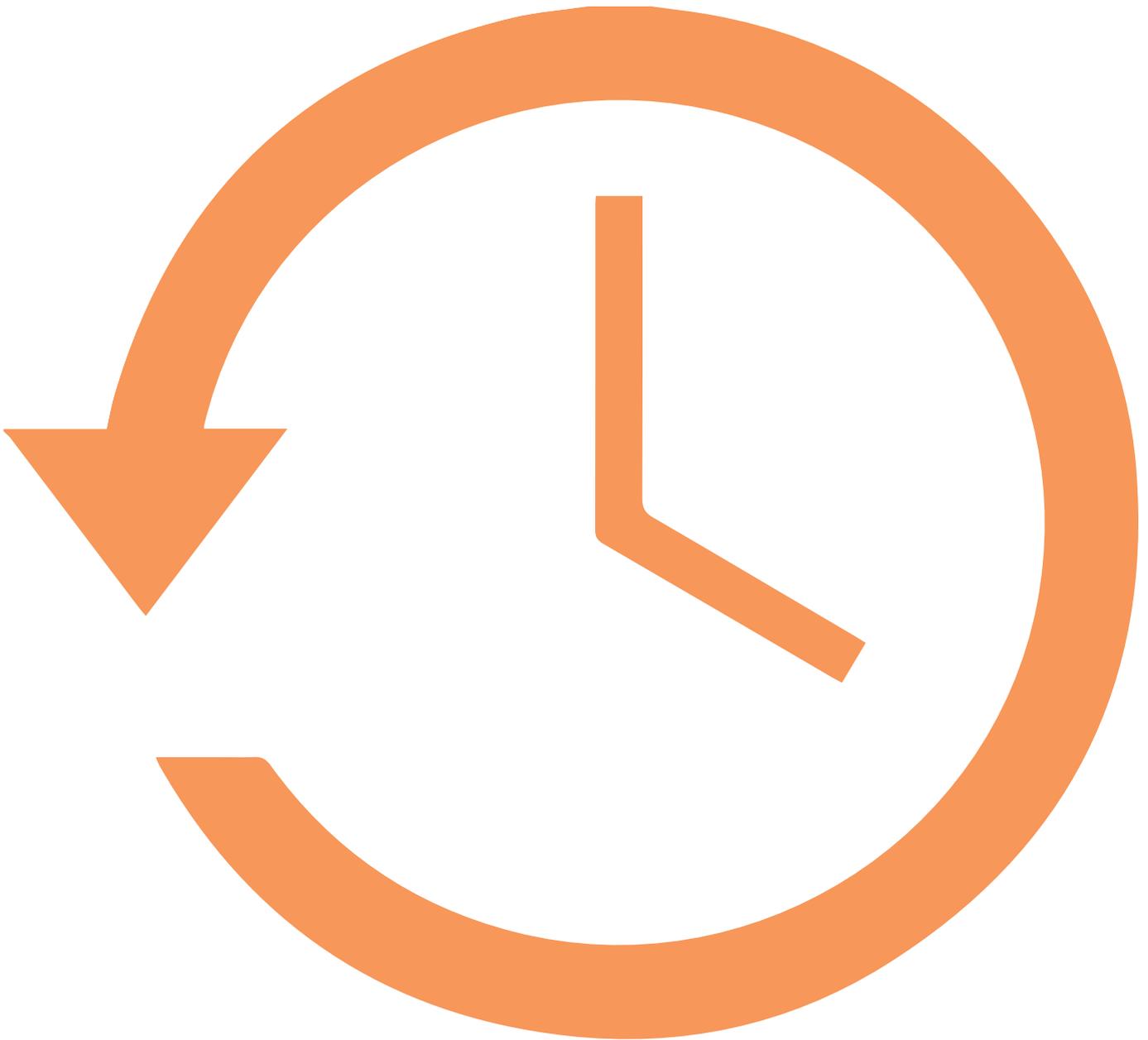
On the subject of ecommerce, of importance was whether or not this subject had matured sufficiently to justify being debated by the MC. Matters pertaining to security, infrastructure and accessibility fall beyond the scope of WTO's mandate and speaking on the trade-related matters cannot be done until surrounding concerns are dealt with in other fora. On this topic, the relevance to the fourth industrial revolution and ensuring equal gains for market participants is of specific concern to South Africa. Improving information and communications infrastructure must be prioritised to maximise gains.

Subsidising of fisheries, particularly pertaining to international subsidising of illegal fishing activity contributes to threats faced by the South African fisheries sector. Ensuring better access for artisanal and small-scale fisheries, and monitoring illegal fishing activities were highlighted as key issues.

A formalised agreement on investment facilitation was tabled at the Conference. However, as with previous attempts to the table, the issue was that no consensus was forthcoming. South Africa's position remains that facilitating investment must be organised within the policy space of the country in order to serve specific needs and policy directives.

Trade facilitation remains a priority at South African borders, specifically with regard to intra-African trade.

Working papers



Available on the **Agecon Search international**
online platform: <http://ageconsearch.umn.edu>

Levy Expenditure on Export Promotion

M.H Lubinga, N. Mazibuko, S. Ngqangweni,
X.Y Potelwa and B. Nyhodo

South Africa's industries in the agricultural sector spend some of the statutory levy income on Export promotion and market development (EPMD) activities. However, some industries argue that levy expenditure on EPMD activities generates satisfactory returns on investment. To provide empirical evidence in support of the arguments put forward, a study was undertaken by building a unique dataset based on levy expenditure on EPMD for four industries (citrus, deciduous fruits, table grapes and wine). Furthermore, an assessment of the impact of export promotion on exports, net agricultural income and social welfare over a ten years' period (2006-2015) was conducted. Study findings suggest that on average, a unit increase in levy expenditure on EPMD leads to an increase in exports by 7.3 percent (table grapes and deciduous fruits), 5.6 percent (wine), 5.25 percent (citrus). Similarly, findings reveal that a unit increase in levy expenditure on EPMD is on average associated with a 7.5 percent, 4.9 percent, 4.3 percent and 3.6 percent increase in agricultural net income for table grapes, citrus, wine and deciduous fruits, respectively. For social welfare, levy expenditure on export promotion was attributed to social welfare improvement across the four industries, and the improvement ranged from 0.2 percent to 0.4 percent per unit increase in levy expenditure on EPMD.

The study recommends that there is a need to mobilise more resources to facilitate the EPMD initiative into new markets and products for the industries.

For the full article, go to: <http://www.namc.co.za/research-portal/wp-content/uploads/2017/09/UPDATED-VERSION-Export-promotion-REPORT-AUGUSTL-2017.pdf>



Agribusiness, trade and investment trends in Africa



S. Lekgau, C.R Matlou, and H.M Lubinga

Agriculture is a huge business globally due to upstream and downstream opportunities. Africa derive most of the economic opportunities from agriculture compared to the developed and developing countries which derive contributions from the service and industrial sectors. This shows that Africa is still far from development and it will require significant amount of resources to change the current picture of dependency on agriculture to the other sectors of the economy.

This study was conducted in an attempt to address three research questions about agribusiness, trade and investment in Africa. i.e. i) to find out whether Africa is trading with its self-enough; ii) the driving and restraining forces of agribusiness development in Africa; and iii) the importance of agribusiness development, trade and invest in Africa.

Findings shows that there is trade imbalance among African countries. These countries are trading less with each other as compared to trading with non-African countries. Fewer commodities are traded within the continent than it does with the developed and other developing countries. Intra-African trade is dominated by grains, followed by vegetables and fruits and South Africa is a key trading partner on the continent. African governments need to expand access to trade, finance and reduce trade restrictions for trade balance. Increasing intra African trade relations can assist in stimulating the continent's economic growth while fostering job creation as well.

The increasing population dynamics, urbanization, growing middle class with differential incomes, increase in consumption patterns on basic and diversified products and food waste are some of the driving forces of agribusiness. Development of agricultural business, trade and investment according to the predictions, will continue and will be propelled by these driving forces. The increase population which is expected to be 2 billion in Africa by 2050 means there will be a huge demand for food (raw and processed) to feed the projected population. Africa has about 60 percent of the world land. Therefore, policies should safeguard that there are agricultural investment programs initiated on this available land to ensure that Africa has greater potential to produce enough food to feed everyone in the world by 2050.

Identified restraining forces include policy uncertainties, lack of infrastructure, trade distortions and climate change. Although the continent can feed itself, there are issues of climate change which continues to hit most African countries. In order to succeed in the production and trading of agricultural commodities, efforts need to be made to adapt and mitigate climate change effects, trade distortions and to implement proper policies. In addition, there is need to improve infrastructure which seems to be a serious hurdle to trade in Africa.

Agribusiness in Africa can create opportunities through investment in infrastructure; farming and agro-processing while at the same time also contribute to development of skills. The existing literature on agricultural business development shows that it is more beneficial to trade with processed commodities as compared to less processed or raw agricultural commodities. This can contribute to a significant country growth in terms of GDP values as well as food security status. Moreover, this will contribute to additional job opportunities through further processing and handling as other sectors of the economy will be created through forward linkage process. However, in order to create and expand the agribusiness opportunities in Africa, more investment from both the public and private sector is required. Banks and developmental financial institutions must be willing to amend their strict lending policies and criteria so that entrepreneurs can invest in agribusiness industries.

African governments need to come together to discuss ways in which they can strengthen trade among themselves, how the continent can make use of the arable land (increasing agricultural products), ways in which the continent can deal with issues such as climate change and improve infrastructure. Addressing the above issues will lead to reduction in poverty and food insecurity which are serious issues in Africa. More development and investment is still needed in the African countries to advance the contribution of the agricultural sector towards its economies.

For the full paper, go to: <https://ageconsearch.umn.edu/record/262914/files/Agribusiness%20and%20Trade%20in%20Africa.pdf>

Journal Articles



Impact of European Union generalized system of preferences scheme on fruit and vegetable exports from East Africa

M.H Lubinga, A.A Ogundeji, H. Jordaan and A.J Verschoor

Overall, in this article a more precise approach for assessing how trade agreements influence trade at commodity level is proposed, and the European Union's Generalized System of Preferences (EU-GSP) was used as an example on horticultural commodities from East Africa region. In simpler terms, the approach takes cognisance of the fact that trade agreements use various trade instruments, both tariff and non-tariff measures. In most instances (if not all anyway), the assessment of how trade agreements impact on trade flows focuses on tariffs only thereby ignoring the compounding effect of the non-tariff measures, such as quotas, entry prices and specific duties, which are always entailed in the agreements. Not including the non-tariff measures jeopardises the true value (margin) of the preferential treatment accruing to the beneficiary country. In addition, the approach recognises that the tariff and non-tariff measures of each trade agreement vary considerably for each commodity, hence the need for commodity level-based analysis rather than evaluating trade policy effects as a collective of a wide spectrum of commodities. Thus, the proposed competition-adjusted preference margin approach must be computed as the absolute difference between trade-weighted applied Most Favoured Nation's (MFN) rate and all the other trade policy instruments entailed in the agreement. For comparison purposes, all trade policy instruments must be transformed into ad valorem equivalents (AVEs). The specific findings pertaining East Africa's horticultural exports to the European Union are not detailed in this brief, but can be accessed in the full paper. The take home message from this paper is as follows. Empirical evaluation of trade policies, be it the GSP, AGOA (bilateral or not) should be done at commodity level and the quantification of the preferential treatment accruing to the beneficiary country must be inclusive of both tariff and non-tariff measures embedded within the trade policy. Tariffs are just a small component of trade agreements, especially in the modern times where non-tariff barriers are the "in-thing".

For the full paper, go to: <http://www.namc.co.za/research-portal/wp-content/uploads/2017/09/Impact-of-European-Union-Generalized-System-of-Preferences-scheme-on-fruit-and-vegetable-exports-from-East-Africa-A-preference-margin-approach.pdf>

This paper was published in the Outlook on Agriculture 2017, Vol. 46(3) 213–222. It could also be accessed via the journal's website: <http://journals.sagepub.com/doi/abs/10.1177/0030727017728590>

How has consumer education influenced pork consumption in South Africa?

H.M Lubinga, S. Ngqangweni,
N. Mazibuko and A. Balarane

Since deregulation, the pork industry collects statutory levies as provided for by the Marketing of Agricultural Products Act, No. 47 of 1996 (MAP Act). On average, an estimated annual levy of R 17.5 million is collected, of which slightly more than 50% is spent on consumer education/promotion. Consumers are educated about the health and nutritional benefits of pork and its products through SAPPO. Again, they are assured of a safe product as a result of the quality assurance and traceability scheme. However, there is uncertainty about the extent to which the rise in per capita consumption of pork may be attributed to consumer education among other factors. The study evaluates the impact of consumer education on pork consumption in South Africa.

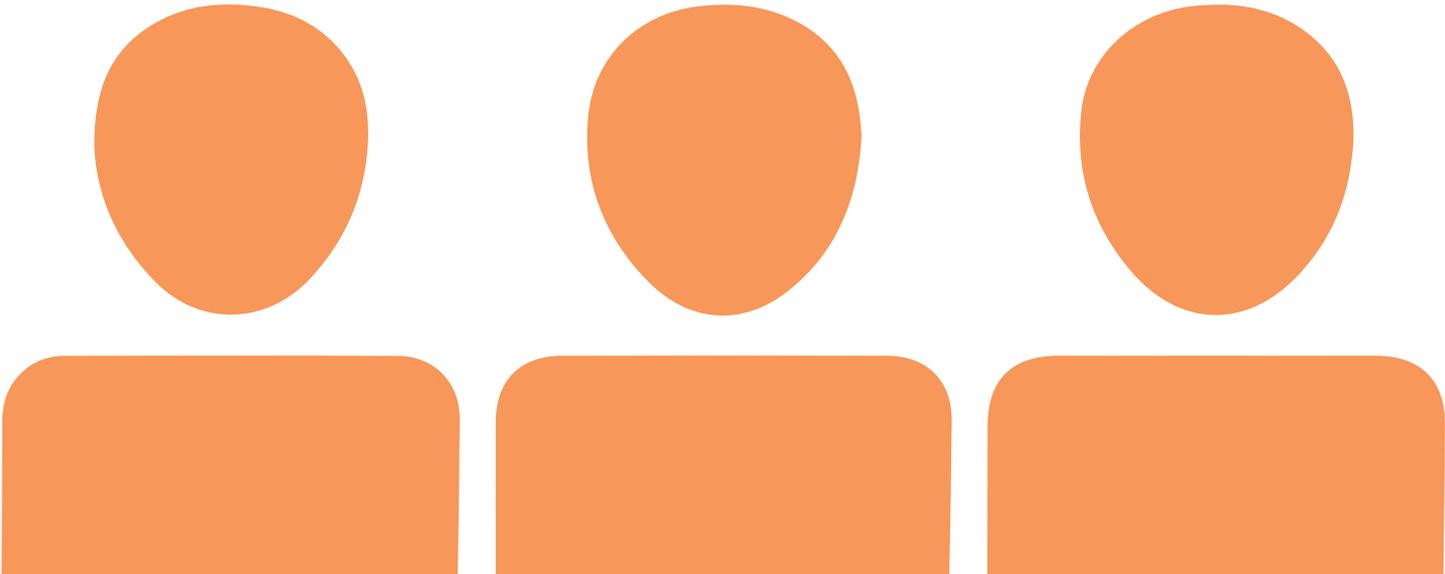
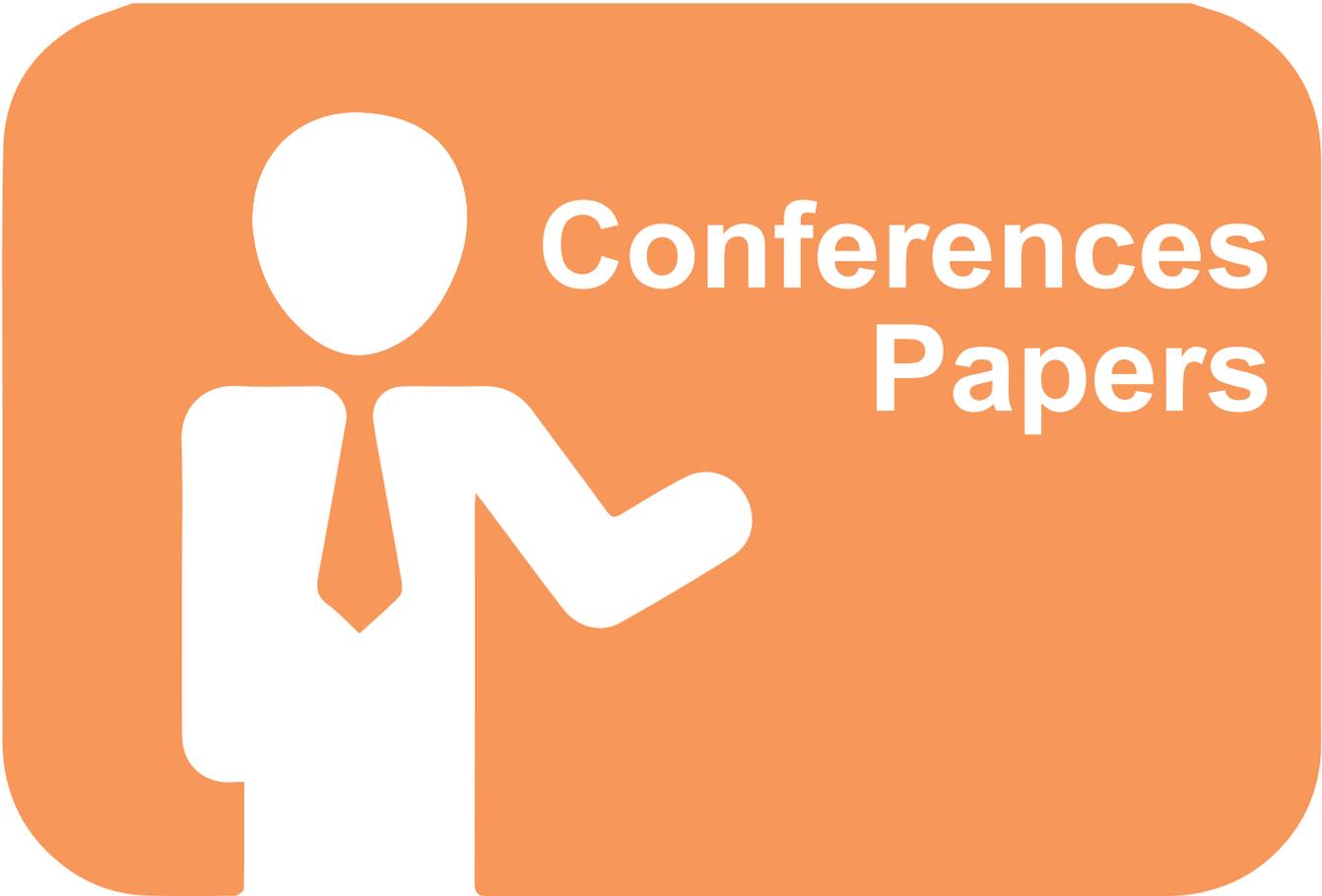
Findings show that people's tastes and preferences for processed pork products positively impact on pork consumption while health and nutrition exhibits a negative effect on pork consumption. Given the relatively low per capita consumption of pork in South Africa in comparison with other types of meat, there is need to further sensitize the populace about the benefits of pork and its related products to demystify any misconceptions and perceptions. Moreover, consumer education should focus more on the low-income earners since this segment of the population accounts for a relatively small proportion (10%) of total pork consumed. The consumer education/promotion initiative has a likelihood to restore consumer confidence about health and safety aspects and to build trust in the brand identity. Therefore, pork industries should invest more on consumer education. Policy wise, more resources should be made available in support for consumer education as to increase pork consumption and ease misconceptions about pork.

Consumer education, proxied by statutory levy expenses on consumer education has a positive impact on increased pork consumption in South Africa. A unit increase in statutory levy expenditure on pork consumption is associated with a 0.045 increase in pork consumption. Other economic drivers that has a positive impact on pork consumption trend include the rising household disposable income and the real urban retail price of fresh pork chops. Amongst the non-economic factors, the volume of processed products has a positive impact on pork consumption while severe malnutrition among children under five years presents a negative impact on pork consumption.

Consideration should be accorded to devising ways of reducing production costs. This could be through policy support in order to ensure increased competitiveness on feed production in South Africa. Careful consideration should also be given to increasing the processing of pork into valued added products so as to cater for consumers' tastes and preference for high quality pork products. More research is required as well as resources in order to have a deeper understanding of drivers influencing consumers' attitudes about pork consumption which might lay a strong foundation for a more effective consumer education initiative.

For the full paper, go to: <https://ageconsearch.umn.edu/record/262911/files/Consumer%20education%20and%20Pork%20Consumption%20.pdf>

This paper was published in the International Journal of Applied Business and Economic Research 2017, ISSN: 0972-7302, Volume 15 (20). The paper could also be accessed via the journal's website: <http://www.serialsjournal.com>



Transformation of smallholder farming to commercial farming

E. Nekhavhambe, P.K. Chauke and E.N Raidimi

The South African government introduced several strategies aimed at assisting smallholders, largely black farming sector, to shift towards commercial farming, with minimal success. Certain programmes employed by government broadening smallholder market participation included the AgriBEE programme; Land reform programme; Strategic Infrastructure project (SIP) 11; Extension Recovery Programme; Statutory Measures and Comprehensive Agricultural Support Programme (CASP). A study was conducted to assess the factors that would transform subsistence to commercial farmers in the Mutale Local Municipality, Vhembe District of South Africa.

The study identified dominance of women, lower youth participation, poor training and educational achievements, non-membership to agricultural organizations, low income levels and dependence on social grants and lack of credit as factors that could impact on farmers' transformation process. The study recommended for development of strategies that could increase youth participation in

farming such as start-up credit, reduction of dependence on social grants by adopting strategies that could increase productivity and thus income, exposure to funding opportunities through training and increased involvement of institutions of higher learning into smallholder farming activities. In a nut shell, smallholder commercialization requires the capital intensification, partnership and capacity building.

Smallholder farmers should focus more on practicing crop diversification on crops that could withstand harsh climatic conditions. They also need to be exposed on the benefits of group farming, membership to agricultural association such as industries.

This paper was presented at the Sekhukhune Annual Advisory and Extension Conference 2017. For access to the full paper, please contact Elekanyani Nekhavhambe at ENekhavhambe@namc.co.za or 012 341 1115.





Feature

Yolanda Potelwa was previously an Economist within MERC under the Trade focus area. In 2017, she graduated Msc Agricultural economics (University of Pretoria).

Her role and responsibilities at NAMC included research, coordinating publications such as Trade-Probe and Fruit-flow. Yolanda worked on the trade unit with supervision from Mr Bonani Nyhodo. “I am privileged that I have worked with him because I will be able to spread my wings” she said. She further indicated that Bonani gives a room for growth and to make mistakes.

Yolanda was involved in a study commissioned with Bonani Nyhodo, looking at the poultry sector in Mozambique. The project gave her an insight on how the country ensures that producers are protected from import countries such as Brazil and Argentina. She contributed into an upcoming book where she worked with Tralac, looking at the issues that affect the African continent in improving the intra-Africa Trade.

Yolanda now works at Potatoes South Africa as a Marketing Development Specialist. According to Yolanda, working for NAMC gave her insights on issues affecting the agricultural industries and exposure in various industries within the agricultural sector. She took every challenge presented to her at NAMC as an opportunity to better her career.

Yolanda’s proudest moment working for NAMC was when she received an opportunity to attend the 2014 IFAMA conference in USA, Atlanta. She urges prospective economists to position themselves, understand what they are good at because agriculture is very diverse. Her fears are rejection and oppression especially as women in the agricultural sector. Yolanda would like to be known as a hard worker, driver and person who went an extra mile in boosting the economy as well as alleviating poverty in our societies.



Media



Land Expropriation Without Compensation talks intensify

Click the picture or go to: [Land Expropriation Without Compensation talks intensify](#)




Dr. Christo Joubert is always featured every Tuesdays on Channel 144 DSTV from 05H30 am – 05h49. He feature weekly giving expert analysis on a range of agro-food chains issues. The show is called Grootplaas on Kyknet

The Markets Insider covered the NAMC, highlighting the partnership between the House of Hemp and NAMC along with other key partners.





Mark Your Calendars

EVENTS



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Mar

3rd Economic Research Advisory Network (ERAN) 2018 Annual Conference, Durban, KwaZulu-Natal, South Africa. 14 to 16 March 2018. <http://www.thedti.gov.za/ERPC/papers.jsp>

21st Annual Conference on Global Economic Analysis, June 13-15, 2018 in Cartagena, Colombia. <https://www.gtap.agecon.purdue.edu/events/conferences/2018/default.asp>

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6th International Conference, 20-24 June 2018, Elenite Holiday Village, Bulgaria. <https://www.sciencebg.net/en/conferences/agriculture-and-food/>

International Conference on Sustainable Development 2018, Oxford (London), U.K. August 14 - 15, 2018. <http://www.ontariointernational.org/icsdconference.htm>

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Aug

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Fourth Common market for eastern and Southern Africa (COMESA) Research Forum proposed to be held in August 2018 in Kigali Rwanda. <http://www.comesa.int/call-for-papers-2018/>

The 56th annual conference of Agricultural Economics Association of South Africa (AEASA) 25 – 27 September 2018 at the Lord Charles Hotel, Somerset-West, Western Cape. <https://centeevents.wixsite.com/aeasa2018>

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Sep

PAST EVENTS



Seminar

For Sharing Solutions

Behavioural Change



The NAMC hosted a seminar on the 2nd February 2018, where Mr. Lindikaya Myeki from the University of New England (Australia) was sharing a presentation on behavioural change. The presentation was based on a preliminary analyses of business performance data pulled out from a behavioural change survey conducted by the ARC and the NAMC for the Australian Centre for International Agricultural Research (ACIAR) project titled “High quality markets and value chains for small-scale and emerging beef cattle farmers in South Africa”. The presentation focussed on the development of farmer psychological profiles in beef and poultry value chains and also on correlated profiles of farmer business performance to customise development programmes. He highlighted critical points to be considered in order to enhance innovative systems and processes for an effective and viable beef and poultry value chain. These include the need for quality, accuracy and consistency; analysis of business performance indicators; and correlation between business performance and psychological profile of farmers. These should inform the development of intervention strategies. Lessons learnt from the exercise were the need to calibrate the empirical model to explain the factors determining the decision to sell; a measure of the relationship between the likelihood to sell and the farmers’ performance; and the clarification of the role of psychological factors.

For more information, please contact Mr. Myeki at lindikayam@yahoo.co.za

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