



NAMMC

Promoting Market Access for South African agriculture



NAMMC STRATEGIC PLAN

FOR
2023/24-2027/28



ACCOUNTING AUTHORITY STATEMENT


PRESENTING YOU THE 2023/24 – 2027/28 STRATEGIC PLAN

As the currently constituted Council of the NAMC we took over the reins in an environment characterised by several uncertainties both internally and externally. The COVID-19 pandemic was at its peak with the global economy experiencing significant challenges. More recently the Russia-Ukraine conflict has added further shocks to the system. These challenges required us to craft a strategy to support – in line with our mandate - an agricultural sector that grows in a more resilient, inclusive and sustainable manner. Our coordination of the crafting, implementation and monitoring and evaluation of the Agriculture and Agro-processing Master Plan (AAMP), presents a unique opportunity for the NAMC to play its evidence-based facilitation and advisory role more visibly in the agricultural sector.

This 2023/24-2027/28 revised strategy seeks to align our annual targets with the tenets of the AAMP. We will continue to build on our good track record in supporting smallholder farmers to access markets. We are heartened to indicate that this particular target has been surpassed in recent times. In the spirit of the AAMP, we will continue to forge partnerships with our stakeholders in discharging our mandate.

We will also continue to build on recent improvements in our audit outcomes by supporting the efforts of the Management team in enhancing our adherence to good governance principles and applicable legislation. We are encouraged that our relationship with the Minister has been formalised through the signing of the Shareholder Compact. This Compact provides for mutual understanding of the Honourable Minister's strategic expectations from the Council. The Compact also recognises the need for the Honourable Minister to provide an enabling environment and requisite resources for the Council to execute its mandate.

With the above background, I hereby present the 2023/2024 -2027/2028 Strategic Plan to the Minister of Agriculture, Land Reform and Rural Development



Mr Angelo Petersen

Chairperson of Council

National Agricultural Marketing Council (NAMC)



ACCOUNTING OFFICER STATEMENT

As the Management team of the NAMC we look forward to putting more effort into building on the performance achievements of the previous strategic plan period, while bearing in mind that we need to continuously work to improve our service delivery.

We will work to minimise and eventually eliminate all legacy and address any new audit findings, on irregular, fruitless and wasteful expenditure. This will partly entail making sure risk management is part of our organisational culture. By so doing we will demonstrate that we are performing our work not only effectively, but also in a compliant manner.

In terms of execution of our core business, our partnership with and oversight over industry entities that manage trusts and statutory measures will be enhanced to become more mutually beneficial. Recently, the levy revenues and expenditures have grown. Trust assets have remained resilient in the face of global economic shocks. The Transformation Review Committee (TRC) has intensified its work, resulting in a marked improvement in many of the transformation programmes that are being implemented across the country. During this coming reporting period we will continue to engage with our industry partners to ensure that their efforts are aligned with those of the government in the context of implementation of the AAMP. Better public-private alignment will minimise resource wastage, maximise synergies and impact.

Guided by this revised strategy, we will also continue in our efforts to get more smallholder farmers linked with the market. This is an area where parliamentary oversight has been consistently focussed on, and we have been able to provide positive outcomes. The amount of research output that has been produced has grown in

recent times. Its relevance has also been enhanced by the increasing number of ministerial advisory notes that have been derived from the research output. We will continue to forge research partnerships and undertake joint projects with our partners.

Following the signing of the AAMP social compact document in May 2022, there has been a strong anticipation by all stakeholders of the next steps in the process. There is a collective goodwill and commitment in implementing the AAMP. The NAMC faces the unique privilege of driving this process.

Finally, the NAMC prides itself in being a trusted voice in contemporary public discourse in areas related to our mandate. We will continue in the same vein in this strategy period.

In presenting to you the National Agricultural Marketing Council Strategic Plan 2023/24 – 2027/28, and in my role as the Accounting Officer of the NAMC, I hereby commit to the implementation of this Strategic Plan.



Dr Simphiwe Ngqangweni
Chief Executive Officer
National Agricultural Marketing Council

Official Sign-Off

It is hereby certified that this Strategic Plan:

- Was developed by the management of the NAMC under the guidance of the NAMC Council;
- Takes into account all the relevant policies, legislation and other mandates for which the NAMC is responsible; and
- Accurately reflects the strategic goals and objectives which the NAMC will endeavour to achieve over the period 2023/24 – 2027/28

PROGRAMME	SIGNATORY
Programme 1	<p>Dr. Simphiwe Ngqangweni</p> <p>Signature: </p> <p>Ms Irene Mathatho</p> <p>Signature: </p> <p>Ms Nolwazi Simelane</p> <p>Signature: </p>
Programme 2	<p>Mr Schalk Burger</p> <p>Signature: </p> <p>Dr Tempia Ndiadivha</p> <p>Signature: <u>Ndiadivha Tempia</u></p> <p>Mr. Bonani Nyhodo</p> <p>Signature: </p>
Programme 3	<p>Ms Khumbuzile Mosoma</p> <p>Signature: </p> <p>Dr Tempia Ndiadivha</p> <p>Signature: <u>Ndiadivha Tempia</u></p>





Chief Financial Officer	Ms Irene Mathatho Signature: 
Chief Executive Officer	Dr. Simphiwe Ngqangweni Signature: 
Chairperson of Council	Approved by: Signature:  Mr Angelo Petersen Chairperson of the Council



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DEFINITIONS

Statutory measures	“Statutory measures” means a levy contemplated in section 15, and a direction contemplated in sections 16, 18 and 19 of the MAP Act.
Industry Trusts	Trust within the Context of the MAP Act 47 of 1996 refers to bodies that were formed and became recipients of the assets and funds of the former control boards. The Trust Property Act, 57 of 1988 defines a “trust” as the arrangement through which the ownership of property of one person is by a trust instrument made over or bequeathed.
Transformation	Refers to ensuring that the previously disadvantaged individuals actively participate in the entire agricultural value chain and broadly contribute to the economic development of the country.
Smallholder producers/farmers	Refers to a producer that produces (at primary, secondary, and tertiary levels) for household consumption and markets, therefore farming is consciously undertaken to meet the needs of the household and derive a source of income. These are usually the new entrants aspiring to produce for the market at a profit with a maximum annual turnover of up to R5 million per annum.
Market Access Models	Refers to models that enable smallholder producers to sell their agricultural produce in a market. The models are used to organise producers to deal with the quality and quantity as per market requirements as well as addressing comprehensive producer support during production.
Directly Affected Groups	“Directly affected group” means any group of persons who is a party to the production, sale, purchase, processing or consumption of an agricultural product and includes labour employed in the production or processing of such product.
Minister	Refers to the Minister of the Department of Agriculture, Land Reform and Rural Development.
Department	Refers to the Department of Agriculture, Land Reform and Rural Development.



ABBREVIATIONS

NAMC	National Agricultural Marketing Council
DALRRD	Department of Agriculture, Land Reform and Rural Development.
ADD	Agribusiness Development Division
AMP	Agricultural Master Plan
ARC	Agricultural Research Council
DAG	Directly Affected Groups
ICT	Information, Communication Technology
IT	Information Technology
ITAC	International Trade Administration Commission
FMD	Foot and Mouth Disease
MAP ACT	Marketing of Agricultural Products Act No. 47 of 1996
MERC	Markets and Economic Research Centre
MTEF	Medium-Term Expenditure Framework
MTSF	Medium-Term Strategic Framework
NDP	National Development Plan
OBP	Onderstepoort Biological Products
PPECB	Perishable Produce Export Control Board
RSA	Republic of South Africa
SOE	State-owned Entity
US	United States
WTO	World Trade Organization



PART A: OUR MANDATE





PART A: OUR MANDATE

1. CONSTITUTIONAL MANDATE

The constitutional basis of the work done by the NAMC rests in the mandate of the Department of Agriculture, Land Reform and Rural Development (DALRRD) which in turn is derived directly from the Constitution of the Republic of South Africa (Act No.108 of 1996). The specific sections of the Constitution (Act 108 of 1996) that applies to the DALRRD and thereby the NAMC are Sections 24, 25 and 27 of Chapter 2, of the Bill of Rights. Section 24 deals with environmental rights, including “secure ecologically sustainable development and use of natural resources while promoting justifiable economic and social development. Land reform which aims to bring about equitable access to all of South Africa’s natural resources is addressed in Section 25(4)(a). The right to access food and water is reflected in Section 27(1)(b). The provision for food security covers the agriculture value chain from inputs, production, value add (Agro-processing), and marketing to retailing.

The NAMC as a statutory organisation of the DALRRD derives its mandate directly from the MAP Act. The NAMC was established by the Department and in terms of Marketing of Agricultural Products (MAP) Act No. 47 of 1996, as amended by Act No. 59 of 1997 and Act No. 52 of 2001. The MAP Act essentially provides for the authorisation, establishment, and enforcement of regulatory measures to intervene in the marketing of agricultural products including the introduction of statutory measures on agricultural products. The NAMC plays an active role in the coordination of the work relating to the four statutory measures mentioned in the Act, coordinates the work of industry trusts, undertakes thorough research aimed at advising the Minister and DAGs on marketing and economic matters and works directly with farmers to address their marketing matters.

2. LEGISLATIVE AND POLICY MANDATES

The Marketing of Agricultural Products (MAP) Act and its subsequent amendments

The mandate of the NAMC is enshrined in the MAP Act, which authorises the establishment and enforcement of regulatory measures to intervene in the marketing of agricultural products e.g., the introduction of statutory measures. The NAMC is established by Section 3 of the MAP Act and the functions of the NAMC particularly feature in section 9 of the Act, this section stipulates that -

“Functions of Council

9. (1) Subject to the provisions of section 2, the Council-
 - (a) shall, when requested by the Minister, or of its own accord, investigate, in terms of section 11(2), the establishment, continuation, amendment or revocation of statutory measures affecting the marketing of agricultural products, evaluating the desirability, necessity or efficiency and if necessary, proposing alternatives to the establishment, continuation, amendment or repeal of a statutory measure and report to and advise the Minister accordingly;
 - (b) shall prepare and submit to the Minister for consideration Statutory measures and changes to statutory measures which the Minister directs it to prepare;
 - (c) shall, whenever requested by the Minister and at least once annually, report on the activities of the Council;
 - (d) may direct any institution or body of persons designated for the purpose of the implementation or administration of a statutory measure in terms of section 14, to furnish the Council with such information pertaining to a statutory measure as the Council, the Minister or the parliamentary committees may require;



- (e) may undertake investigations and advise the Minister regarding-
- (i) agricultural marketing policy and the application thereof;
 - (ii) the coordination of agricultural marketing policy in relation to national economic, social and development policies and international trends and developments; and
 - (iii) the possibilities for promoting the objectives mentioned in section 2(2); and
 - (iv) the effect that the marketing of products has on the objectives mentioned in section 2(2)
- (f) shall monitor the application of statutory measures and report thereon to the Minister and shall evaluate and review such measures at least every two years.
- (2) Copies of all reports which are submitted to the Minister in terms of subsection (1) shall simultaneously be despatched to the parliamentary committees for their information.

The NAMC performs the above-mentioned mandate in support of the four (4) objectives of the MAP Act, i.e.:

- Increasing market access to all market participants,
- Promotion of efficiency in the marketing of agricultural products,
- Optimise export earnings from agricultural products, and
- Enhancement of the viability of the agricultural sector.



LEGISLATION	BRIEF DESCRIPTION
Agricultural Pests Act (No 36 of 1983)	Provides measures to prevent and combat agricultural pests.
Agricultural Produce Agents Act (No 12 OF 1992)	Provides for the establishment of an Agricultural Produce Agents Council and fidelity funds in respect of agricultural produce agents and the control of certain activities of agricultural produce agents.
Agricultural Product Standards Act (No 119 of 1990)	Provides for control over the sale and export of certain agricultural products, control over the sale of certain imported products and control over other related products.
Agricultural Produce Agents Act, 1992 (Act No.12 of 1992)	Provides for the establishment of an Agricultural Produce Agents Council and fidelity funds in respect of agricultural produce agents and the control of certain activities of agricultural produce agents.
Animal Diseases Act (No 35 of 1984)	Provides for the control of animal diseases and parasites and for measures to promote animal health.
Animal Improvement Act (No 62 of 1998)	Provides for the breeding identification and utilisation of genetically superior animals to improve the production and performance of animals.
Fencing Act (No 31 of 1963)	Consolidates laws relating to fences and the fencing of farms and other holdings and matters incidental thereto.
Fertilisers, Farm Feeds, Agricultural Remedies and Stock Remedies Act (No 36 of 1947)	Includes provisions in respect of the regulation or prohibition of the importation, sale, acquisition, disposal or use of fertilisers, farm feeds, agricultural remedies and stock remedies and the designation of technical advisors and analysts.
Liquor Products Act (No 60 of 1989)	Includes provisions for control over the import and export of certain alcoholic products.
Meat Safety Act (No 40 of 2000)	Includes provisions/measures to regulate the importation and exportation of meat, and to establish and maintain essential national standards in respect of abattoirs.
Perishable Products Export Control Act (No 9 of 1983)	Provides for the control of perishable products intended for export from the Republic of South Africa.
Subdivision of Agricultural Land (Act 70 of 1970)	Provides for the sub-division and, in connection therewith, the use of agricultural land
National Development Plan (NDP)	The NDP advocated for agricultural development based on successful land reform, employment creation and strong environmental safeguards.
Agriculture Policy Action Plan (APAP)	APAP aims at promoting labour absorption and broadening market participation through well-considered, adequately consulted and finely-tuned strategic interventions.
Integrated Growth and Development Plan (IGDP)	The IGDP focuses on three strategic issues, namely equity and transformation, equitable growth and competitiveness and environmental sustainability.
MAFISA Credit Policy Framework	Provides for provision of funding through accredited Retail Lending Entities to on-lend to targeted end-users within pre-determined target areas.

3. INSTITUTIONAL POLICIES AND STRATEGIES OVER THE FIVE-YEAR PLANNING PERIOD

The NAMC will not be developing any institutional policies and strategies over the 5-year planning period. However, the NAMC has tasked the Department of Agriculture, Land Reform and Rural Development (DALRRD) to research and coordinate the development of the Agriculture and Agro-processing Master Plan (AAMP). In addition, the NAMC through its function is actively contributing to and participate in the development of policies and strategies that impact its work. Examples of policies that the NAMC will contribute to are the DALRRD's Agricultural Insurance Policy Framework, Rural Development Strategy, Rural Safety Policy, Comprehensive Agricultural Statistics Policy, Agricultural Trade Policies, Climate Change Policy and Emission Inventory Programme, Animal Identification and Traceability Strategy, National Policy in Organic Production, Crop Production Policy, National Policy on Plant Improvement, State Assets Acquisition and Lease Disposal Policy, Agricultural Land Holdings Policy Framework, Agricultural Produce Agencies Amendment Bill, Communal Land Recordal Framework and Land Tenure Policy for Commercial Farming Framework. In the course of performing its core functions, the NAMC provides the Minister with policy advice and statutory measures recommendations that inform and guide agricultural policies and strategies.

4. RELEVANT COURT RULINGS

There are no Court Rulings with significant, ongoing impact on the operation or service delivery of the NAMC.





PART B: OUR STRATEGIC FOCUS





PART B: OUR STRATEGIC FOCUS

1. VISION

The Vision of the NAMC is captured as the *“strategic positioning of agriculture in a dynamic global market”*.

This Vision is aligned with the DALRRD’s Mission which includes “...improve agricultural production to stimulate economic development and food security through, amongst others, innovative sustainable agriculture and promotion of access to opportunities for youth, women and other vulnerable groups.

It also speaks to the sustainable agricultural productivity element of the DALRRD’s Impact Statement. As stated in the DALRRD’s Strategic Plan for 2020-2026 (dated 24th October 2019), “Sustainable Agricultural Productivity refers to a functioning system which ensures that food is produced optimally using available resources including adequate access to fertile land, water, agricultural inputs, funding, markets, production capability (i.e., research, biosecurity, skills, etc) within the short and long term”.

Specifically, the NAMC Vision indirectly responds to:

Priority 2: Economic Transformation and Job Creation

Outcome: Investing in accelerated inclusive growth and Re-industrialization of the economy and emergence of globally competitive sectors:

- Create jobs through Job Summit Commitments and other public sector employment programmes; and
- Create a conducive environment that enables national priority sectors to support industrialisation and localisation, leading to increased exports, employment, and youth- and women-owned SMME participation.

Priority 3: Education, Skills, and Health

- Expand access to Post-Secondary Education and Training (PSET)
- Extension policy reviewed to support the implementation of the agriculture and Agro-processing master plan and provide advisory services to commodity groups.

Priority 5: Spatial Integration, Human Settlements and Local Government

Outcome: Integrated service delivery, settlement transformation and inclusive growth in rural and urban places

- Develop and implement district/metro Joined-Up Plans
- Develop Regional Spatial Development Frameworks
- Support addressing of development objectives and local needs through piloting, refinement, and implementation of the District Development Coordination Model
- Identify and use derelict government land and buildings in urban and rural areas as a catalyst for spatial transformation in support of the NSDF and IUDF objectives, including land and agrarian reform. (9 993 Ha identified – custodianship of national DPWI identified for human settlements purposes)
- National Spatial Development Framework (NDSF)
- Sustainable land Reform



2. MISSION

The Mission of the NAMC is to “Provide marketing advisory and regulatory services to key stakeholders in support of a vibrant agricultural marketing system in South Africa”. The Mission is aligned with the Vision of the NAMC and expresses the core functions that the NAMC performs as stipulated in Section 9 of the MAP Act No 47 of 1996.

3. VALUES

The following values are adopted as our commitment to entrench and deepen the “NAMC” way, both in our behaviour and service offering.

- Integrity (honesty / ethical/trustworthy/transparent)
- Assertiveness (accountable / responsible / reliable / taking ownership / confident)
- Collaboration (consultative / teamwork / participative/cooperative)
- Service excellence (performance driven / target oriented / service oriented / motivated/committed/diligent)
- Fairness (equal treatment/respect/tolerance/consistency)
- Objectivity (analytical/rational / attention to detail / conceptual)
- Innovation (creative / pro-active / adaptive/flexible / initiative)

4. SITUATIONAL ANALYSIS


The performance and achievements of the NAMC are directly impacted by external and internal factors and contexts. The external context includes the advent of the global coronavirus (COVID-19) in 2019, the subdued global economy as a result of the triple effects of the slow recovery from the global coronavirus pandemic (Covid 19), the ongoing conflict between Russia and Ukraine, as well as higher inflationary pressures in the global economy. The subsequent effects of regulations on global and domestic demand-supply interactions for food, trade and labour markets have had a noticeable impact, with the country’s Gross Domestic Product (GDP) slowing by 0, 7% in Quarter 2 of 2022 and the unemployment rate reaching the 30% mark. The availability of financial (budget) and human(skills) resources for the work of the NAMC constitute some of the internal contexts of the NAMC’s operations. Both the internal and external factors underpinning the performance of the NAMC are unpacked below. Both the internal and external factors underpinning the performance of the NAMC and ultimately MERC are unpacked below.

5. EXTERNAL ENVIRONMENT ANALYSIS

5.1. CLIMATE CHANGE

Between the years 2011 and 2020, the global surface temperature rose from 0.95 to 1.20°C when compared to the increase observed over the period of 1850–1900. In comparison to 1850–1900, the global surface temperature increased by 0.99°C during the 2001–2020 period. The pace of increase in the global surface temperature since 1970 has exceeded, with high confidence, the rates of growth for at least the last 2000 years and for any previous 50-year period. According to the 2023 report of the Intergovernmental Panel on Climate Change (IPCC), climate-exposed sectors, including agriculture, fisheries, tourism, and forestry among others, have shown signs of economic impact.

For instance, the devastation of houses and infrastructure, the loss of assets and income, the security of food and



human health, and the negative consequences on gender and social fairness have all had an impact on individual lifestyles. In South Africa, climate change risks have been observed as a shift towards early and delayed rainfall. This has resulted in a shorter growing season and a rise in the frequency of mid-season dry spells, droughts, and floods, all of which are expected to become more common and intense because of predicted climate change.

5.2. THE EUROPEAN UNION (EU) GREEN DEAL

Climate change and environmental degradation is increasingly threatening the global food systems and environmental sustainability. The high temperatures, variable rainfall patterns, and other extreme weather events such as droughts, floods, heatwaves, and cyclones, associated with climate change are contributing to the reduction in agricultural yields, disrupting food supply chains, and displacing communities worldwide. In an attempt to mitigate climate change and environmental degradation, the European Union (EU) member states enacted the EU Green Deal (EGD) in 2019. The EU aims to be a global leader in climate change mitigation by ensuring that Europe is climate neutral by 2050. Moreover, the EGD aims to ensure a clean and efficient energy transition, protecting biodiversity and ecosystems, a healthy food system, efficient and environmentally friendly transport, and an industry strategy for a competitive green and digital Europe.


European Commission has adopted a set of proposals to make the EU's climate, energy, and transport and taxation policies fit for reducing net greenhouse gas emissions by at least 55% by 2030, compared to 1990 levels. The EU's goals are to ensure food security in the face of geopolitical uncertainties, climate change, and biodiversity loss, reduce the environmental and climate footprint of the EU food system, strengthen the EU food system's resilience, and lead a global transition toward competitive sustainability from farm to fork. Due to the mirror clauses associated with the EGD climate policies,

several countries willing to trade with the EU need to align with the set of policies applicable to the EU producers. Consequently, given that EU is one of South Africa's biggest trading partners in terms of agricultural trade, South African exporters to the EU will need to adapt to this change, to assure their long-term competitiveness in this changing market.

5.3. RISKS AROUND AFRICAN GROWTH AND OPPORTUNITY ACT (AGOA)

In value terms, South Africa's exports are close to half of its agricultural output. In 2022, they reached a record high of US\$12.8 billion (R211.1 billion). In market terms, Africa remains the largest market for South Africa's agricultural exports accounting for 37% in 2022. Asia came in second with 27%, the EU came in third with 19% of exports, and the Americas came in fourth with 6%. Specific to the AGOA, South Africa's agricultural products find a sizable market amounting to US\$648 million (R12.7 billion) in 2022, making up between 5-6% of South Africa's overall agricultural exports. AGOA is a United States of America trade act that was passed on May 18, 2000, as Public Law 106 of the 200th Congress. It has been renewed over the years and will expire in 2025, with renewal options. The legislation significantly expands market access for South Africa to the USA.

To qualify for and remain eligible for AGOA, South Africa must work to improve its rule of law, human rights, and respect for essential labour norms. AGOA is more essential for South Africa in other industries, such as automobiles and machinery, and less so in agriculture. While the AGOA has had a positive impact on the South African agricultural industry, it is still in its early stages, with industries that benefit exporting fresh fruit, particularly oranges, almonds, processed fruit, wine, alcohol, dairy products, and fruit and vegetable juice. However, the US is considering numerous other exportable high-value agricultural items from South Africa, most notably avocados, for which negotiations have made great progress. However, political conflicts



or misunderstandings between South Africa and the USA have caused uncertainty over South Africa's future eligibility for the AGOA.

Aside from minor trade issues such as chicken in 2015, the Russia-South Africa relationship remains the primary risk for South Africa as an AGOA recipient. Despite these reservations, South Africa will host the 2023 AGOA in November, despite disagreements between the two countries.

5.4. THE FARM-TO-FORK STRATEGY

The Farm-to-Fork Strategy is an essential component of the European Green Deal, which seeks to make Europe the first continent to reach carbon neutrality by 2050. This strategy aims to develop a sustainable, equitable, healthy, and environmentally friendly food system. The Farm to Fork Strategy contains nine specific goals, including a 50% reduction in the use of chemical pesticides and fertilizers by 2030, a reduction in the sale of antimicrobials in farming and aquaculture, an increase in the amount of land utilized for organic farming, and a reduction in food waste. It also aims to ensure that by 2030, all schoolchildren have access to healthy, sustainable meals.

Furthermore, it seeks to label food products with nutritional and environmental information, promote sustainable eating habits, empower farmers, and fund research on sustainable food systems. Despite being a long-term vision, the strategy has already yielded beneficial effects, such as a reduction in pesticide and fertilizer use and an increase in organic farms, all of which contribute to the EU's attempts to attain climate neutrality and become a global leader in sustainable food systems by 2050. South Africa can align with the EU's Farm to Fork Strategy by supporting and incorporating

the coordinated aspects of the National Food Security Strategy (NFSS). For instance, NFSS should emphasize supporting farmers financially and technically, investing in sustainable agriculture research and development, promoting sustainable diets, reducing food waste, improving food safety, and collaborating internationally to promote global sustainable food systems.

6. INTERNAL ENVIRONMENT ANALYSIS

The NAMC prides itself on a team of highly qualified and experienced economists that strategically place the organisation at the forefront of providing policy advisory to the policymakers and directly affected stakeholders. However, challenges related to capacity building remain and readily available analytical tools may compromise the role of MERC in providing timeous, relevant economic advice based on scientific research to the stakeholders. The policy advice emanates from the research outputs that MERC produces throughout the year. The research output includes food price monitoring, food cost, commodity value chain analysis, trade policy analysis and identification of market opportunities as well as models to integrate smallholder farmers into the formal agricultural markets. To address this challenge, there is a need to conduct a needs analysis to establish the inventory of analytical tools and access to data sources necessary to conduct research as well as build capacity to ensure that the skill development and capacity development initiatives are fit for purpose. The NAMC's contribution of its core divisions to this mandate is summarized in the table below.

Table 1: Core Divisions' contribution to the NAMC mandate


Division	Contribution to the NAMC mandate
Agribusiness Development	The agribusiness development division contributes to the NAMC mandate by designing market access models that enable farmers to participate in the new and existing markets as well as facilitate market access for farmers.
Agricultural Industry Trusts	The Agricultural Industry Trusts play a role in ensuring that the assets of the trusts are safeguarded and used to ensure the viability of the agricultural sector.
Markets and Economic Research Centre (MERC)	Is mandated to provide timeous and relevant market and economic advice which is scientific and evidence-based to the Minister of Agriculture, Land Reform and Rural Development and the Directly Affected Groups (DAGs) to ensure that the South African agricultural sector is strategically positioned in a globally dynamic environment.
Statutory Measures	The NAMC investigate applications for statutory measures in terms of the MAP Act and advises the Minister accordingly.

6.1. AGRICULTURAL TRANSFORMATION FUNDED THROUGH AGRICULTURAL INDUSTRY TRUST FUNDS AND STATUTORY MEASURES (LEVIES)

According to the latest NAMC report on the status of agricultural industry trusts (2021 survey), the expenditure spent by the various agricultural industry trusts on transformation activities was R63.07 million. This represented an R13.54 million decrease compared to the previous survey period (2020). Agricultural industry trusts are crucial in facilitating transformation in the various industries and their efforts need to be supported by especially the government and other stakeholders. Some of the critical initiatives funded through industry trust funds include enterprise development as well as skills development and training. The NAMC status report on statutory measures (2021 survey) indicates that a total of R698.2 million was spent on industry functions in 2021, representing a 6 percent increase compared to the R658.7 million that was spent in 2020. Of the total expenditure, about 21.1 percent (R147.2 million) was spent on transformation projects. It is critical to indicate that this is above the 20 percent benchmark that is recommended by the NAMC and prescribed by the Minister when approving the various applications for statutory levies by industries. The overall levy transformation expenditures by the various industries increased from R79.8 million in 2015 to R210.3 million in 2021, representing an increase of 78 percent over seven years.

6.2. RESEARCH-BASED POLICY AND STATUTORY MEASURE/S PROPOSALS THROUGH THE MERC DIVISION

SECTION 9(1) (e) (i) and (ii) of the MAP Act empowers the NAMC to advise the Minister regarding agricultural marketing policy and the application thereof, and the coordination of agricultural marketing policy in relation to national economic, social and development policies, as well as international trends and developments. The MAP Act authorizes the establishment and enforcement of regulatory measures to intervene in the marketing of agricultural products, including the introduction of levies on agricultural products; to establish a National Agricultural Marketing Council; and to provide for matters connected therewith. The functions of the NAMC are executed through its core divisions



through the facilitation of the statutory measures, overseeing the agricultural trusts and providing advisory services to the Minister of DALRRD and Directly Affected Groups (DAGs).

The NAMC was tasked by Minister to coordinate the research and consultations of stakeholders to gain insights and develop the sectoral master plan and its contribution to the country's Economic Reconstruction and Recovery Plan. The NAMC successfully developed the Agriculture and Agro-processing Master Plan (AAMP) which was signed and endorsed by policymakers and captains of industries on the 12th of May 2022. The AAMP encourages meaningful partnerships between private and public institutions to leverage available resources, knowledge and skills to bring in efficiency and predictability in agricultural policies and regulations, upscale production and value-add on produce originating from commercial and non-commercial areas, create sustainable jobs and decent employment conditions in farms, enhance food security at the household level, and strive for inclusive growth underpinned by a comprehensive farmer support programme.

The NAMC through its research and technical divisions is entrusted to monitor and evaluate the implementation progress, using its research tools and systems available within the NAMC. Parallel to monitoring the AAMP, the NAMC will continue to provide evidence-based advisory services to policymakers, industry captains, and DAGs. In the domain, the research will determine the trade policy space available to deepen the localisation of food and import substitution, where South Africa has comparative and competitive advantages. Furthermore, the NAMC will continue to facilitate statutory measures to assist the private sector to strengthen generic services such as the collection of industry data, research for development and transformation and markets, in particular export markets to optimise foreign earnings. Lastly, the NAMC

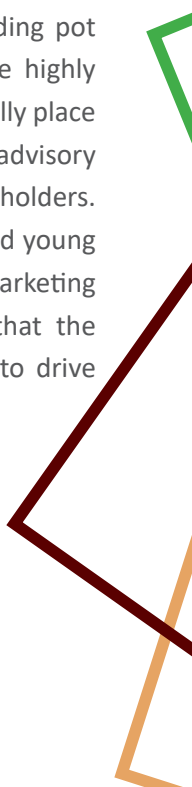
research and advisory services will design innovative market access models to enhance the participation of small-scale and emerging farmers.

6.3. MARKET ACCESS FOR SMALLHOLDER FARMERS

Despite the numerous support programmes for smallholder farmers that the NAMC has implemented in the past, market access for these farmers remains a challenge due to the lack of comprehensive support, inconsistent production, fluctuating quality and transport costs to markets. The NAMC's Agri-business Development division designs Market access models that link smallholder farmers to the markets and integrate them into the commercial mainstream. The market facilitation programme is guided by market analysis, market readiness of farmers, market demand and stakeholder intervention to support farmers to supply the identified market. These programmes enable the NAMC to contribute to making the agricultural sector more inclusive and viable as a contributor to economic growth and transformation. The NAMC will contribute to increasing the smallholder farmers' market share, by linking 360 farmers to market opportunities by the end of the 5 - year period.

6.4. ORGANISATIONAL CAPACITY

The NAMC core staff is made up of economists and this has turned the organization to be a breeding pot for agricultural economists in the country. The highly qualified and experienced economists strategically place the NAMC at the forefront of providing policy advisory to the policymakers and directly affected stakeholders. Moreover, the NAMC has recruited and upskilled young economists to drive research intelligence and marketing policy analysis for the sector. This suggests that the organization has the capable human capacity to drive the new strategy.





PART C:

INSTITUTIONAL PERFORMANCE INFORMATION



PART C: INSTITUTIONAL PERFORMANCE INFORMATION

1. IMPACT STATEMENT

The impact statement of the successful implementation of this Strategic Plan is based on and directly aligned with the Vision and Mission of the NAMC and the political priorities for the 6th term of administration.

Impact Statement	A viable and inclusive agricultural marketing system contributing to food security, socioeconomic growth and sustainable development.
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2. MEASURING OUR OUTCOMES

The three (3) NAMC strategic outcomes are as follows:

- The NAMC delivers on its mandate and core functions.
- A viable and efficient agricultural sector generating optimal earnings (domestic and international); and
- Enhanced market access for the agricultural sector participants.

The outcomes against which the NAMC can be measured are derived directly from the four objectives of the Marketing of Agricultural Products Act (MAP Act) namely:

- Increasing market access to all market participants,
- Promotion of efficiency in the marketing of agricultural products,
- Optimise export earnings from agricultural products; and
- Enhancement of the viability of the agricultural sector.

Through investigating and monitoring the effective implementation of the statutory measures and safeguarding the agricultural trusts' assets, the NAMC contributes to the enhancement of the sector's viability. The evidence-based policy advisory generated for industry captains and policymakers through research publications and market access programmes for smallholder farmers enables the NAMC to promote market efficiency and access as well as the optimisation of export earnings. Through the research and oversight functions, the NAMC indirectly assists the Department of Agriculture, Land Reform and Rural Development to achieve its national priorities reflected as the Medium-Term Strategic Framework (MTSF) priorities / Outcomes, ERRP goals of food security and sustainable rural economy and AAMP vision of inclusive growth. Furthermore, the NAMC assists with priority number one of seven for the 6th term of administration outlined in the June 2019 State of Nation Address (SONA), which is achieving economic transformation and job creation.

MTSF Priority/ DALRRD Outcome	<ul style="list-style-type: none"> • Improved governance and service excellence • Increased Market Access and maintenance of existing market • Growth of inclusivity within agricultural value chains 		
Outcomes	Outcome Indicators	Baseline	Five-year target
The NAMC delivers on its mandate and core functions.	Compliant management and good governance of the entity, throughout the current term of governance.	The NAMC achieved three clean audits and two unqualified audit opinions over the past five years.	<p>The NAMC functions at optimal levels deliver on its core-function indicators and receive unqualified audit opinions for each financial year of the 5 years.</p> <p>Achievement of ICT services targets in operational plans of each financial year</p>
A viable and efficient agricultural sector generating optimal earnings (domestic and international); ¹	Approved policy advisory that facilitates the marketing of agricultural products, throughout the term of governance.	The NAMC provided 100% policy of scheduled advisory notes to policymaking institutions.	NAMC approved policy advisory and statutory measures of each financial year of the 5 years are adopted by the Minister and implemented by all directly affected stakeholders
	Approved statutory measures recommendations submitted to the Minister.	The NAMC evaluated statutory measures in about 80% of agricultural industries	
	NAMC annual reports reflect the transformation of the sector	An annual average of 20% of statutory levies is spent on transformation activities	An annual average of 20% of levies is spent towards the funding of transformation activities
Enhanced market access for agricultural sector participants ²	NAMC annual reports reflect increased market access	Smallholder farmers hold a 3% share of the agricultural market	The NAMC will contribute to increasing the smallholder farmers' market share, by linking 360 farmers to market opportunities by the end of the 5 - year period.
	NAMC annual reports reflect increased export growth of agricultural products	The agricultural export growth rate fluctuated between 1.9% and 3.5% over the past five years.	Contribute to the 2% average growth in agricultural exports, through research initiatives.

¹Aligned to Section 2 (b), (c) and (d) of the MAP Act

²Aligned to Section 2 (a) of the MAP Act

3. EXPLANATION OF PLANNED PERFORMANCE OVER THE FIVE-YEAR PLANNING PERIOD

3.1. CONTRIBUTION TO THE MTSF AND THE MANDATE OF THE NAMC INCLUDING, WHERE APPLICABLE, PRIORITIES ABOUT WOMEN, YOUTH AND PEOPLE WITH DISABILITIES.

Contribution to the MTSF

The DALRRD contributes to the following 3 (three) of the 7 (seven) Government Priorities:

PRIORITY 2: ECONOMIC TRANSFORMATION AND JOB CREATION

Outcome: Investing in accelerated inclusive growth & Re-industrialization of the economy and emergence of globally competitive sectors:

- Create jobs through Job Summit Commitments and other public sector employment programmes; and
- Create a conducive environment that enables national priority sectors to support industrialisation and localisation, leading to increased exports, employment, and youth- and women-owned SMME participation.

PRIORITY 3: EDUCATION, SKILLS, AND HEALTH

- Expand access to Post-Secondary Education and Training (PSET)
- Extension policy reviewed to support the implementation of the Agriculture and Agro-processing master plan and provide advisory services to commodity groups.

PRIORITY 5: SPATIAL INTEGRATION, HUMAN SETTLEMENTS AND LOCAL GOVERNMENT

Outcome: Integrated service delivery, settlement transformation & inclusive growth in rural and urban places

- Develop and implement district/metro Joined-Up Plans
- Develop Regional Spatial Development Frameworks
- Support addressing of development objectives and local needs through piloting, refinement, and implementation of the District Development Coordination Model
- Identify and use derelict government land and buildings in urban and rural areas as a catalyst for spatial transformation in support of the NSDF and IUDF objectives, including land and agrarian reform. (9 993 Ha identified – custodianship of national DPWI identified for human settlements purposes)
- National Spatial Development Framework (NDSF)
- Sustainable land Reform

Outcome 1 of the NAMC, i.e. “The NAMC delivers on its mandate and core functions” contributes to Outcome 1 (improved governance and service excellence) of the DALRRD which is overarching and applicable to all the sectors the Department works with. Compliant management and good governance of the NAMC, which is reflected in its financial management and corporate services functions, will enable the institution to deliver on its mandate and core functions and thus Outcome 1 speaks to this.

Outcome 2 of the NAMC, i.e. “A viable and efficient agricultural sector generating optimal export earnings” contributes primarily to Outcome 5 (Increased market access and maintenance of existing markets) of DALRRD. However, the NAMC also provides research, policy proposals and statutory measures that impact the policy environment. In addition, this outcome includes initiatives that transform the sector, increase export earnings from agricultural products and increase market access for smallholder farmers.



Outcome 3 of the NAMC, i.e., “Enhanced market access for the agricultural sector” contributes to Outcome 5 (Increased market access and maintenance of existing markets). This outcome is aligned with Objective 2(A): Increasing market access for all market participants.

Contribution to the mandate of the NAMC

The mandate of the NAMC is to undertake investigations, advise the Minister on Agricultural Marketing policy and develop statutory measure proposals, for the Minister’s consideration and adoption, in support of the four (4) objectives of the MAP Act, i.e.:

- Increasing market access to all market participants,
- More efficient marketing of agricultural products,
- Increased export earnings from agricultural products, and
- Enhanced viability of the sector.

The NAMC is also mandated to investigate the implementation of and compliance with the statutory measures and is tasked with managing the establishment of Agricultural Industry Trusts which is the main mechanism for facilitating the development of a more inclusive sector.

Outcomes 2 and 3 directly contribute to the various elements of the NAMC’s mandate and core functions.

Enablers to achieve 5-year targets.

The following are the enablers to achieving the NAMC’s 5-year targets:

- Human capital and a conducive working environment
- Budgetary availability to execute the mandate.
- Technological and working tools.
- Effective stakeholder management
- Effective support from the shareholder department

Contribution to achieving the Impact.

All the outcomes, collectively and individually, contribute to achieving the impact. However, Outcomes 2 and 3 are the dominant contributors. This collective and individual contribution is summarised below.

Outcome 1 relates to the support functions required to enable the core functional areas to perform at optimal levels and to deliver the outcomes specific to the NAMC’s mandate. This outcome incorporates the principles of good governance and management, as well as effective, efficient and prudent use of resources. It encompasses Strategic management, governance and accountability; Financial Management, Human Resource Management; ICT; Financial Management; Communications and Enterprise Risk Management services.

Outcome 2 deals with the policy and statutory measure proposals that the NAMC is expected to develop and submit as per the MAP Act, and which will contribute to achieving the 4 objectives of the said Act. This outcome contributes to the marketing system, food security and economic growth and development aspects of the impact statement.

Outcome 3 deals with access to markets which contributes to the elements of “a viable marketing system, economic growth and development” in the impact statement. This outcome ensures that the trusts’ assets are protected and

utilised efficiently in the development of existing and new entrants into the agricultural sector. In addition, research on smallholder market access is conducted, to promote market access models that are aimed at increasing market access, encouraging new business development and capacity building for smallholder farmers/agri-businesses.

4. UPDATED KEY RISKS AND MITIGATION

Risk Name	Risk Description	Control Improvement Plan
SR1	Inadequate capacity to support core functions	a) To implement continuous training on the organisational processes; NAMC staff, oversight structures and other stakeholders b) To review and ensure proper capacity (expertise) is sought and maintained. c) To initiate a programme for reskilling officials based on budget availability. d) To continuously ensure a safe working environment for all NAMC employees in line with the OHS Act. e) Review Human Capital policies and procedures as and when required. f) Facilitation of teambuilding sessions. g) Explore models for income generation (resource mobilisation). h) Develop a stakeholder universe (SOP).
SR2	Possibility of providing incorrect/ inadequate advice to the Minister and directly affected stakeholders/ groups	a) Develop an industry data repository. b) Implement the provisions of the Agricultural Trust Policy. c) Review and approve Research Strategy.
SR3	Non-adherence to the Marketing of Agricultural Product (MAP) Act and its procedures;	a) Resuscitate the working committee between the Department and NAMC.
SR4	The expectation for the NAMC to implement programs or provide support beyond its mandate	a) Facilitate development support for farmers linked with the market. b) Stakeholder engagements (Awareness on NAMC mandate and defining the roles and responsibilities of the NAMCs mandate



SR5	Failure to adhere to good governance and poor compliance with relevant prescripts.	<ul style="list-style-type: none">a) Review and Approve Ethics and Integrity Policy.b) Awareness of Ethics and other related policies that talk to governance.c) Develop Ethics and Anti-Fraud and Corruption Programmes.d) Implement the approved Ethics and Anti-Fraud and Corruption Programme.e) Engagement sessions with staff on an ethics management programme.
SR6	Spread of the Coronavirus	<ul style="list-style-type: none">a) Review and approve the Business Continuity Management Policy.b) Review and approve the Business Continuity Plan.c) Implementation of the Business Continuity Plan.d) Testing of the Business Continuity Plan.
SR7	Budget constraints or limitations in financial resources	<ul style="list-style-type: none">a) Explore models for income generation - resource mobilization (Request for increase in the baseline).
SR 8 (New Risk)	Negative Audit Opinion	<ul style="list-style-type: none">a) Regular awareness campaigns on NAMC policies and proceduresb) Consequence Managementc) Implementation of the approved delegation of Authority Framework



PART D:

TECHNICAL INDICATOR DESCRIPTIONS (TID)



5. PUBLIC ENTITIES

No Public Entities are reporting to the NAMC.

Name of Public Entity	Mandate	Outcomes
N/A	N/A	N/A

PART D: TECHNICAL INDICATOR DESCRIPTIONS (TID)

Outcome 1

Indicator Title	Compliant management and good governance of the entity, throughout the current term of governance.
Definition	To ensure the NAMC functions optimally through effective business processes, corporate governance, and resource support services. The indicator measures the performance of the NAMC in compliance with all applicable policies, legislation, regulations, and prescripts
Source of data	Audit Report after the Audit, Quarterly Financial, Human Resources, Communications and ICT Reports and relevant related data.
Method of Calculation / Assessment	A simple count of quarterly reports and 1 x audit report per financial year
Means of verification	Quarterly Financial, Human Resources, Communications, and ICT reports. The final Audit Report and opinion are duly signed and stamped by the Auditor General's (AG) office
Assumptions	The NAMC complies with all applicable policies, legislation, regulations, and prescripts
Disaggregation of Beneficiaries (where applicable)	The DALRRD as well as the Minister with a focus on the Agricultural sector in South Africa. <ul style="list-style-type: none"> • Target for women: N/A • Target for youth: N/A • Target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: N/A Spatial impact area: National
Calculation Type	Cumulative
Reporting Cycle	Quarterly
Desired performance	Quarterly Financial, Human Resources, Communications, ICT Reports and 1 x audit report per financial year
Indicator Responsibility	CEO

Outcome 2 (a)

Indicator Title	Approved policy advisory that facilitates the marketing of agricultural products, throughout the term of governance.
Definition	To provide quality research outputs to stakeholders in support of agricultural marketing, trade and policy advisory.
Source of data	Internally produced on secondary data (SARS, STATS SA, FAO, and ITC)
Method of Calculation / Assessment	Simple Count of Agricultural Marketing, Trade and Policy Advisory
Means of verification	All Agricultural Marketing, Trade and Policy advisory reports produced. Proof of approval
Assumptions	That all trade, marketing, and advisory reports will be submitted, approved and the secondary data is available
Disaggregation of Beneficiaries (where applicable)	The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to structural and spatial transformation priorities: N/A Spatial impact area: National
Calculation Type	Cumulative
Reporting Cycle	Quarterly
Desired performance	Trade Probe and advisory reports will be produced and approved by Senior Manager
Indicator Responsibility	Senior Manager: MERC

Outcome 2 (b)

Indicator Title	Annual report on Status of Statutory Measures submitted to the Minister for approval
Definition	This refers to the Statutory measures recommendations and report compiled in terms of section 9 of the MAP Act and submitted to the Minister each financial year.
Source of data	Statutory Measures Applications Database of information developed and maintained by the Administrators of statutory measures and Completed questionnaire and audited financial statements.
Method of Calculation / Assessment	Statutory Measures applications and reports submitted to the Minister for her consideration.
Means of verification	Statutory Measures applications and Status of Statutory Measures Report
Assumptions	The information provided in the report is accurate.
Disaggregation of Beneficiaries (where applicable)	The beneficiaries of the statutory measures work are the 18 Agricultural Industries which are utilising statutory measures. The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: Statutory measures and policy advisory will promote agricultural economic growth, create employment opportunities and will promote transformation in the relevant agricultural industries. Spatial impact area: South African Agriculture.
Calculation Type	Cumulative and non-cumulative respectively
Reporting Cycle	Quarterly and annual
Desired performance	Statutory Measures applications and 1x Status of Statutory Measures report produced and submitted to the Minister for her approval
Indicator Responsibility	Senior Manager: Statutory Measures

Outcome 2 (c)

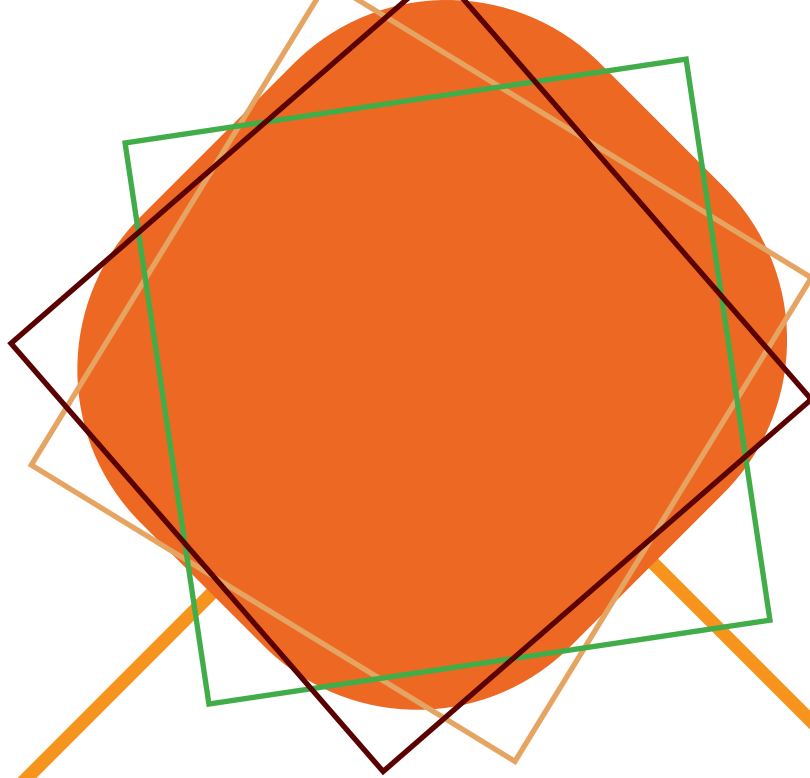
Indicator Title	Annual transformation report submitted to the Minister for approval
Definition	The transformation report is an annual report produced by the NAMC in collaboration with the levy and trusts' administrators outlining the utilisation of the 20% transformation levy as a way to promote and support inclusive growth and competitiveness of the black farmers into the mainstreams of the economy and agricultural value chains. This report is submitted annually to the Minister, portfolio committee and directly affected stakeholders.
Source of data	A structured questionnaire was shared and completed by the levy and trusts administrators. The NAMC's quarterly progress reports on industry transformation support.
Method of Calculation / Assessment	A simple count of 1x transformation report.
Means of verification	Annual transformation report produced. Proof of submission to the Minister for her approval
Assumptions	The information in the reports is accurate. The support measures (such as Financial and Development) for smallholder farmers are in existence and accessible. The farms are compliant with food safety standards and market requirements. The transformation funds are used by the NAMC guidelines on transformation
Disaggregation of Beneficiaries (where applicable)	The beneficiaries of the trusts' fund and levy transformation expenditure aligned to the trust deed and statutory levy applications. The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: The industry transformation activities will promote agricultural economic growth, create employment opportunities and promote transformation in the relevant agricultural industries in South Africa. Spatial impact area: South African Agriculture
Calculation Type	Non-Cumulative (Year – End)
Reporting Cycle	Annual
Desired performance	Annual report on status of agricultural industry trusts submitted to the Minister approval
Indicator Responsibility	Senior Manager: Agricultural Industry Trusts

Outcome 3 (a)

Indicator Title	Number of Smallholder farmers linked to market opportunities
Definition	This is the creation of market access/opportunities for producers/farmers for their agricultural commodities.
Source of data	Documents indicating farmers linked to the markets
Method of Calculation / Assessment	A simple count of 20 smallholder farmers or projects linked to markets
Means of verification	Quarterly Reports indicating the number of farmers that are linked to markets
Assumptions	The information in the reports is accurate. The support measures (such as Financial and Development) for farmers are in existence and accessible. The farms are compliant with food safety standards and market requirements.
Disaggregation of Beneficiaries (where applicable)	The beneficiaries of agribusiness development are all farmers who require services. The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: Agribusiness Development will promote agricultural economic growth and rural development. Spatial impact area: South African Agriculture
Calculation Type	Cumulative
Reporting Cycle	Quarterly
Desired performance	80 x smallholder farmers linked to market opportunities
Indicator Responsibility	Senior Manager: Agribusiness Development

Outcome 3 (b)

Indicator Title	Number of Smallholder Market Access Estimates (SMAE) reports produced
Definition	This refers to reports that detail the performance of agricultural products in export markets.
Source of data	Secondary data was obtained from the South African Union of Food Markets (SAUFM) and or DALRRD and interactions with stakeholders such as the Agricultural Produce Agents Council (APAC) and the Fresh mark Systems.
Method of Calculation / Assessment	Simple Count of twelve of 4 x Smallholder Market Access Estimates (SMAE) reports
Means of verification	Smallholder Market Access Estimate (SMAE) reports Proof of approval
Assumptions	The secondary data is available and that the NAMC succeeds in obtaining actual data.
Disaggregation of Beneficiaries (where applicable)	The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: N/A Spatial impact area: South African Agriculture
Calculation Type	Cumulative
Reporting Cycle	Quarterly
Desired performance	4 x Smallholder Market Access Estimates (SMAE) reports produced and approved by Senior Manager.
Indicator Responsibility	Senior Manager: MERC



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