

NATION IN CONVERSATION NASIE IN GESPREK

PROGRAMME SUMMARY
PROGRAM OPSOMMING

TUESDAY 17 MAY

09h00 - 10h15

The state of the economy: Onwards and upwards Die stand van die ekonomie: Voorwaarts, mars

11h00 - 12h15

Nature matters: The responsible use of chemicals Die natuur maak saak: Die verantwoordelike gebruik van chemikalieë

WEDNESDAY 18 MAY

09h00 - 10h15

Better access: Infrastructure & logistics Beter toegang: Infrastruktuur & logistiek

11h00 - 12h15

Let's fix it: The regeneration of rural communities Kom ons maak reg: Die herlewing van plattelandse gemeenskappe



Theo Vorster
Co-founder: Galileo Capital
Facilitator: Tuesday - Thursday

THURSDAY 19 MAY

09h00 - 10h15

Diversification and the integration of livestock Diversifikasie en die integrasie van lewende hawe

11h00 - 12h15

Data in agriculture: A new era Data in landbou: 'n Nuwe era

FRIDAY 20 MAY

09h00 - 10h15

The future of agriculture: A new generation Die toekoms van landbou: 'n Nuwe generasie

Special Opening Address: Jannie de Villiers



Wandile Sihlobo
Chief Economist: Agbiz
Facilitator: Friday













NATION IN CONVERSATION

A decade of value adding conversations



The year 2022 is truly a red letter year for the Nation in Conversation Forum. This discussion forum celebrates its tenth anniversary this year at the NAMPO Harvest Day in Bothaville and in celebration of the occasion, the forum boasts a brand new NAMPO jacket.

Nation in Conversation will again discuss current issues in the agricultural sector from 16 to 20 May this year and various thought leaders will meet to give a voice to producers and key partners.

Conversations that add value

Nation in Conversation, the brainchild of Francois Strydom – Chief Executive Officer of the Senwes Group, was launched in 2013 and the first production took place under the auspices of the Senwes Future Focus Discussion Forum.

Since then, this discussion forum has become a valuable communication platform from where key stakeholders in the agricultural value chain come together to have impactful discussions on the state of agriculture in South Africa. The purpose of the forum is to inform South Africans about the important role that agriculture plays in our country and the world as well as the role it will play in the future. In short: debate that leads to implementable and sustainable solutions between leaders of different affiliations, political backgrounds and the business sector.

Theo Vorster has acted as a conversation presenter since the first episode and has been accompanied over the years by cofacilitators such as Derek Watts, Eusebius

McKaiser, Jeremy Maggs, Roelf Meyer, Bruce Whitfield, Mpumelelo Mkhabela and Andile Khumalo. This year, Wandile Sihlobo, chief economist of the agricultural business chamber Agbiz, will join Theo Vorster as the facilitator of the youth session.

During 2018 and 2019, Nation in Conversation also participated in NAMPO Cape in the Overberg.

Topics discussed over the past ten years include sustainable meat production, training and educational institutions, land reform, sustainable agri-enterprises, mentorship in agriculture, management of agricultural resources, the value of partnerships, new developments in primary production, the affordability of food, precision farming and technology, environmental challenges, the protection of scarce resources, alternative energy resources, organic farming, biodiversity and sustainability, conservation agriculture, international trade, diversification, financial planning, soil health, women in agriculture as well as agri-transformation.

The need for conversation

Nation in Conversation program presenter Theo Vorster on one occasion summed up the impact of the series well when he said: "Since the beginning of the program, it is clear that the themes affect not only the agricultural community, but the entire population of South Africa."

In turn, Francois Strydom believes that it is in everyone's common interest to ensure that the agricultural industry remains safe and stable, that consensus is sought to overcome the many challenges facing agriculture today and to work together towards a sustainable future.

A new era

In celebration of Nation in Conversation's tenth anniversary, this popular discussion forum will not only boast an innovative brand this year, but also a more dynamic format thanks to sponsors such as Bayer, Engen, Grain SA, John Deere, Nedbank and Senwes.

This year, the following themes will be addressed:

- The state of the economy: onwards and upwards.
- Nature matters: the responsible use of chemicals.
- · Better access: infrastructure and logistics.
- Let's fix it: the regeneration of rural communities.
- Diversification and the integration of livestock.
- Data in agriculture: a new era.
- The future of agriculture: a new generation.

Forty specially invited guests will be part of each of the sessions and the conversations will be broadcasted from the Nation in Conversation studio. The discussions will also be streamed live from the Nation in Conversation YouTube channel.

Visit our webpage:

www.nationinconversation.co.za

for more information as well as our social media platforms (Facebook, Instagram, Twitter and YouTube).













NASIE IN GESPREK

'n Dekade van waardetoevoeging

Die jaar 2022 is voorwaar 'n rooiletterjaar vir die Nasie in Gesprek-gespreksforum. Dié gespreksforum vier vanjaar sy tiende bestaansjaar by die NAMPO Oesdag in Bothaville en ter viering van die geleentheid trek die forum 'n splinternuwe NAMPO-baadjie aan.

Nasie in Gesprek sal vanaf 16 tot 20 Mei vanjaar weer aktuele kwessies in die landbousektor bespreek en verskeie denkleiers sal byeenkom om 'n stem aan produsente en sleutelvennote te gee.

Gesprekke wat waarde toevoeg

Nasie in Gesprek, die geesteskind van Francois Strydom – Hoof Uitvoerende Beampte van die Senwes Groep, het in 2013 die lig gesien en die eerste produksie het onder die vaandel van die Senwes Toekomsfokus Gespreksforum plaasgevind.

Sedertdien het dié gespreksforum 'n waardevolle kommunikasieplatform geword vanwaar sleutelbelanghebbendes in die landbouwaardeketting bymekaar kom om impakvolle gesprekke te voer oor die stand van landbou in Suid-Afrika. Die doel van die forum is om Suid-Afrikaners in te lig oor die belangrike rol wat landbou in ons land en die wêreld speel asook die rol wat dit in die toekoms gaan speel. In kort: debatvoering wat lei tot implementeerbare en volhoubare oplossings tussen leiers van verskillende affiliasies, politieke agtergronde en die sakesektor.

Theo Vorster tree reeds vanaf die eerste episode op as gespreksfasiliteerder en is oor die loop van jare vergesel deur mede-fasiliteerders soos Derek Watts, Eusebius McKaiser, Jeremy Maggs, Roelf Meyer, Bruce Whitfield, Mpumelelo

Mkhabela en Andile Khumalo. Vanjaar sal Wandile Sihlobo, hoofekonoom van die landbousakekamer Agbiz, hom by Theo Vorster aansluit om die jeugsessie te fasiliteer.

Gedurende 2018 het Nasie in Gesprek ook vir die eerste keer aan NAMPO-Kaap in die Overberg deelgeneem, waarna dit ook in 2019 die geval was.

Onderwerpe wat oor die afgelope tien jaar bespreek is, sluit onder meer in volhoubare vleisproduksie, opleiding en opleidingsinstellings, grondhervorming, volhoubare agri-ondernemings, mentorskap in landbou, die bestuur van landbouhulpbronne, die waarde van vennootskappe, nuwe ontwikkeling in primêre produksievelde, die bekostigbaarheid van voedsel, presissieboerderv en tegnologie, omgewingsuitdagings, die beskerming van skaars hulpbronne, alternatiewe engergiebronne, organiese boerderv, biodiversiteit en volhoubaarheid. bewaringslandbou, internasionale handel, diversifikasie, finansiële beplanning, grondgesondheid, vroue in landbou asook agri-transformasie.

Die noodsaaklikheid van gespreksvoering

Nasie in Gesprek-programaanbieder Theo Vorster het per geleentheid die impak van die reeks goed opgesom toe hy gesê het: "Sedert die begin van die program is dit duidelik dat die temas nie net die landbougemeenskap raak nie, maar die hele bevolking van Suid-Afrika."

Op sy beurt meen Francois Strydom dat dit in almal se gesamentlike belang is om te verseker dat die landboubedryf veilig en stabiel bly, dat konsensus gesoek word om die talle uitdagings wat die landbou vandag in die gesig staar te oorkom en om saam te werk na 'n volhoubare toekoms.

'n Nuwe era

Ter viering van Nasie in Gesprek se tiende bestaansjaar, sal dié gewilde gespreksforum vanjaar nie net met 'n vernuwende handelsmerk spog nie, maar ook met 'n meer dinamiese formaat danksy borge soos Bayer, Engen, Graan SA, John Deere, Nedbank en Senwes.

Die temas wat vanjaar aangespreek sal word, sluit in:

- Die stand van die ekonomie: voorwaarts mars.
- Die natuur maak saak: die verantwoordelike gebruik van chemikalieë.
- Beter toegang: infrastruktuur en logistiek.
- Kom ons maak reg: die herlewing van plattelandse gemeenskappe.
- Diversifikasie en die integrasie van lewende hawe.
- · Data in landbou: 'n nuwe era.
- Die toekoms van landbou: 'n nuwe generasie.

Veertig uitgenooide gaste sal deel uitmaak van elk van die sessies en die gesprekke sal vanuit die Nasie in Gesprek-ateljee gebeeldsend word. Die gesprekke sal ook intyds gestroom word vanaf die Nasie in Gesprek Youtube-kanaal.

Besoek www.nasieingesprek.co.za vir meer inligting asook die sosiale media platforms Facebook, Instagram, Twitter en Youtube.













Nation in Conversation

From the pen of Francois Strydom, Custodian of Nation in Conversation

What a privilege to celebrate Nation in Conversation's tenth anniversary this year!

A lot of water has flowed into the sea since that first Senwes Future Focus Day in 2013, and I am proud to say that this discussion forum has since gone from strength to strength.

Over the span of ten years, the discussion forum has already broken a lot of new ground for the entire food and fiber value chain by cultivating understanding and awareness. Impactful discussions have not only succeeded in broadening knowledge, but also in influencing various aspects of the agricultural sector – aspects that form an integral part of the larger South African socio-economic landscape.

The value of the discussion forum lies in the fact that it promotes co-operation between role players, especially in a period in which parties really need each other in order to search for answers together and to reimagine the future.

For a decade now, the interests of rural South Africa have been highlighted in a way that is attractive to the media, and thanks to this exposure, the image of the agricultural industry has been established on a whole new level, not only as the backbone of the local economy, but also as a catalyst for renewal and sustainability.

My wish for the next ten years is that the discussion forum will continue to add value, to strive for the sustainability and stability of the rural countryside and to contribute to the development of the industry as a world leader earning foreign exchange and creating jobs.

May we never stop talking to each other, regardless of our differences.





Nasie in Gesprek

Uit die pen van Francois Strydom, beskermheer van Nasie in Gesprek

Wat 'n voorreg om vanjaar Nasie in Gesprek se tiende bestaansjaar te vier!

Baie water het in die see geloop sedert daardie eerste Senwes Toekomsfokus Dag in 2013, en ek is trots om te sê dat dié gespreksforum sedertdien van krag tot krag gegaan het.

Oor die bestek van tien jaar het die gespreksforum reeds baie nuwe grond gebreek en het dit 'n lansie gebreek vir die volle voedsel- en veselwaardeketting deur begrip en bewustheid te kweek. Deur impakvolle gesprekvoering is daar nie net daarin geslaag om kennis te verbreed nie, maar ook beïnvloeding te laat geskied oor aspekte wat die landbousektor betref – aspekte wat onlosmaaklik deel is van die groter Suid-Afrikaanse sosio-ekonomiese landskap.

Die waarde van die gesprekforum lê juis daarin dat dit samewerking tussen rolspelers promoveer, veral in 'n tydperk waarin partye mekaar daadwerklik nodig het ten einde saam na antwoorde te soek en die toekoms te herbedink.

Vir 'n dekade lank reeds word die belange van die platteland uitgelig op 'n manier wat vir die media aanloklik is en danksy dié blootstelling is die beeld van die landboubedryf op 'n totale nuwe vlak gevestig, nie net as die ruggraat van die plaaslike ekonomie nie, maar ook as katalisator vir vernuwing en volhoubaarheid.

My wens vir die volgende tien jaar is dat die gespreksforum sal voortgaan om waarde toe te voeg, om homself vir die volhoubaartheid en stabiliteit van die platteland te beywer en by te dra tot die uitbouing van die bedryf as 'n wêreldleier wat buitelandse valuta verdien en werksgeleenthede skep.

Mag ons nooit ophou om met mekaar te praat nie, ongeag ons verskille.













A WORD FROM...

THEO VORSTER



have been involved with Nation in Conversation for a decade now - both as a guest, but mostly as one of the discussion leaders.

The role as a discussion leader gives one a very good idea of the critical issues with which farmers wrestle and the successes in the progress made within the entire food supply chain, but then it also measures the temperature of the various topics and the mood of the role players in the industry.

In this decade, I have seen how the emphasis of the conversations shifted, and more so how the temperament of the role players changed over the years.

For most of the Zuma years, there was a total lack of trust between the agricultural community and the state which at times boiled over into open enmity between these parties! The debate over expropriation without compensation has pushed the temperature into the red with several fear merchants who have seen this distress as a catalyst to try to inflame mistrust, in some cases even for their own narrow commercial gain!

These politically charged talks have slowly but surely become more rational and are now beginning to move towards the realization that the parties need each other - farmers depend on the state for the maintenance of the infrastructure to be able to produce food successfully and the state realises that without the co-operation of the agricultural role players, South Africa will not be able to rise to the occasion. Distrust (or rather animosity) is slowly being replaced by a sense of interdependence and a willingness to work together to find solutions to these challenges - to the

point where farmers need to realise that they cannot always rely on the state, but must also find solutions whereby they have to take their own destiny and future into their own hands as far as possible. By taking the future into their own hands, I include both initiatives to make themselves resistant to a failing state, but also to actively look with the state for solutions where such solutions are in the common interest of both parties.

This search for solutions always reminds me of the words of former US President Ronald Reagan: "... the person who agrees with you 80% of the time is your friend and ally - not a 20% traitor". Unfortunately, we simply focus too much on those 20% differences and far too little on the 80% of things we all agree on. Focus on the business of the business rather than on the differences in focus areas - after all, the business of your business is ultimately what it's all about!

Finally, I came to realise what a critically important role organised agriculture plays in the successful survival of the entire agricultural supply chain – from the primary family farming business to the person who can put a healthy and affordable plate of food on the family table. Successful organised agricultural organisations are a competitive advantage for everyone involved in the food value chain and must be supported and strengthened – so that the commercial role players can focus on the business of their businesses!

I invite you to follow the conversations and to become part of the search for solutions - let's focus on the 80% that is in the interest of us all and leave those 20% differences for another day!



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A WOORD VAN...

THEO VORSTER



k is nou al vir 'n dekade lank betrokke my Nasie in Gesprek – beide as 'n gas, maar merendeels as een van die gespreksleiers.

Die rol as gespreksleier gee mens 'n baie goeie idee van die kritiese punte waarmee landbouers stoei en die suksesse in die vooruitgang binne die hele voedselvoorsieningsketting, maar meet dan op die koop toe ook die temperatuur van die verskillende onderwerpe en die gemoed van die rolspelers in die bedryf.

In hierdie dekade het ek gesien hoe die klem van die fokuspunte van die gesprekke skuif, maar veral ook hoe die temperament van die rolspelers oor die jare verander.

Vir die grootste deel van die Zuma-jare was daar 'n algehele gebrek aan vertroue tussen die landbougemeenskap en die staat wat by tye oorgekook het in openlike vyandskap tussen hierdie partye! Die debat rondom onteiening sonder vergoeding het die temperatuur in die rooi gedruk met verskeie vreessmouse wat hierdie benoudheid gesien het as 'n katalisator om wantroue, in party gevalle selfs vir eie eng kommersiële gewin, te probeer aanblaas!

Hierdie polities gelaaide gesprekke het stadig maar seker meer rasioneel geraak en begin nou skuif na die besef dat die partye mekaar nodig het – landbouers is afhanklik van die staat vir die instandhouding van die infrastruktuur om suksesvol voedsel te kan produseer en die staat besef dat sonder die samewerking van die landbourolspelers gaan Suid Afrika nie die mas kan opkom nie. Die wantroue (of eerder vyandskap) word stadig vervang met 'n besef van interafhanklikheid en 'n bereidwilligheid om saam na oplossings vir hierdie uitdagings te soek – tot op die vlak dat landbouers moet besef dat hul nie altyd op die staat kan steun nie, maar ook oplossings

moet soek waar hulle hul eie lot en die toekoms sover moontlik in hul eie hande moet neem.

Met die toekoms in hul eie hande neem, sluit ek beide inisiatiewe in om hulself bestand te maak teen 'n struikelende staat, maar ook om aktief saam met die staat na oplossings te kyk waar sulke oplossings in beide se gemeenskaplike belang is.

Hierdie soeke na oplossings, laat my altyd dink aan die woorde van die eertydse Amerikaanse president, Ronald Reagan: "... die persoon wat 80% van die tyd met jou saamstem, is jou vriend en bondgenoot – nie 'n 20% verraaier nie". Ongelukkig fokus ons eenvoudig net te veel op daardie 20% se verskille en heeltemal te min op die 80% van die dinge waaroor ons almal saamstem. Fokus op die besigheid van die besigheid eerder as op die verskille in fokusareas – die besigheid van jou besigheid is tog uiteindelik waaroor dit gaan!

Ten slotte het ek tot die besef gekom hoe 'n krities belangrike rol georganiseerde landbou speel in die suksesvolle voortbestaan van die hele landbouvoorsieningsketting – van die primêre familieboerdery saak tot by die persoon wat 'n gesonde en bekostigbare bord kos op die gesin se tafel kan voorsit. Suksesvolle georganiseerde landbou-organisasies is 'n kompeterende voordeel vir elkeen betrokke in die voedselwaardeketting en moet ondersteun en versterk word – sodat die kommersiële rolspelers kan fokus op die besigheid van hul besighede!

Ek nooi julle uit om die gesprekke te volg en om deel te word van die soeke na oplossings – kom ons fokus op die 80% wat in ons almal se belang is en los daardie 20% se verskille vir 'n ander dag!





HAPPY DAYS ARE HERE AGAIN!



A WORD FROM PIETER TALJAARD, CEO, GRAIN SA

Osting of the Grain SA NAMPO Harvest
Day is once again a reality. Two years of
Covid-restrictions, of which some remain with
us, has seen the biggest agricultural trade
show in the Southern Hemisphere removed
from the events calendar, together with a
host of other functions.

By now I'm sure you are tired of hearing how challenging these past two years have been for the agricultural industry, but the truth of the matter is it really was. Other than not being able to do business as usual, we recognised and honour the many producers and friends of Agriculture we lost due to the pandemic. For an industry that relies heavily on face-to-face relationships, networking at farmer's days, auctions and events, social distancing felt like a death sentence. Although it has not been plain sailing, Grain SA and its NAMPO Harvest Day has remained resilient and even hosted an industry-first and remarkably successful Virtual NAMPO during 2020.

However, no plans nor ideas could come close to the real thing. And here we stand on the eve of the 54th NAMPO Harvest Day, presented for the first time over five days and once again in the privileged position to showcase agriculture's latest technology, machinery, innovations, and productivity solutions all on one network platform. Recognizing that with the increasingly rate of change in many aspects of life, business and support networks remains crucial.

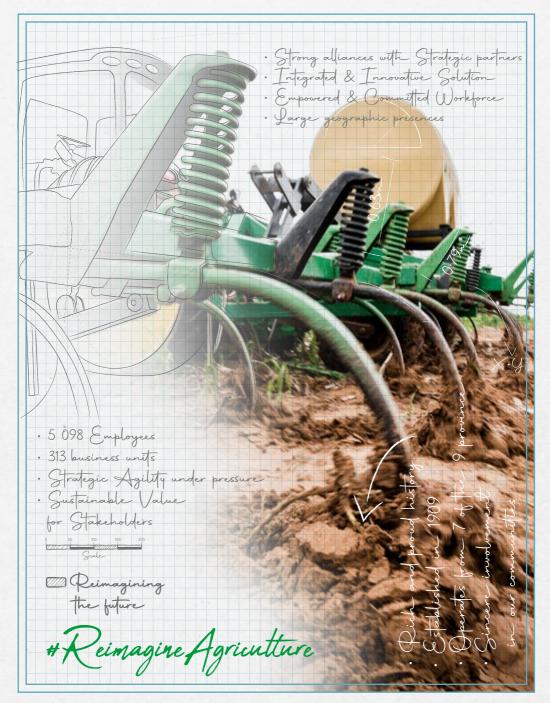
The 2022 theme "Experience It!" encapsulates the invitation to every stakeholder in, and

friend of agriculture, to a vibrant NAMPO Harvest Day which will once again allow people to connect to one another and enjoy real, human experiences. It always has been these experiences that drive businesses forward, connect them to the industry and allow them to bring together new ideas and innovations and work collaboratively.

Complimenting the Harvest Day programme and focusing on bringing together role players in the agricultural sector, the Nation in Conversation initiative offer the agriculture fraternity the opportunity to identify real and relevant local and internationally issues and dig deep to unpack relevant and burning agricultural topics.

After successfully being part of the NAMPO Harvest Day for 10-years, we look forward to welcoming back Nation in Conversation in its new and dynamic format, this year broadcast from a brand new studio and live-streamed simultaneously. Nation in Conversation promises a next-level experience of networking, learning and interaction with industry trailblazers. Just one of the reasons why you should not miss the 2022 NAMPO Harvest Day, as it is geared to do what it does best - connecting people.

Sometimes it is best not knowing what the future holds because happiness isn't what you find at the end of the road. It's right here, right now! Get ready to celebrate once again, as our fantastic event return! We cannot wait to welcome everyone back on NAMPO Park!



At Senwes we are continuously reimagining our future as an agri-business to enable us to expertly assist our clients in reimagining theirs. As a solution-driven agri-business that focuses on providing integrated product and service solutions, Senwes acts as an enabler of sustainability and growth within the entire agricultural value chain.

#BeakingNewGround









GELUKKIGE DAE IS WEER HIER!



'N WOORD VAN PIETER TALJAARD, HUB, GRAAN SA

Die aanbied van Graan SA se NAMPO
Oesdag is weer 'n werklikheid. Twee jaar
van Covid-beperkings, waarvan sommige ons
steeds bybly, het meegebring dat die grootste
landbouhandelskou in die Suidelike Halfrond
van die geleentheidskalender verwyder was,
tesame met 'n magdom ander geleenthede.

Ek is seker jy is nou al moeg om te hoor hoe uitdagend die afgelope twee jaar vir die landboubedryf was, maar die kruks van die saak is dat dit regtig was. Behalwe dat ons nie soos gewoonlik sake kon doen nie, erken en vereer ons talle produsente en vriende van landbou wat ons weens die pandemie verloor het. Vir 'n bedryf wat baie staatmaak op aangesig-tot-aangesig verhoudings, netwerke by boeredae, veilings en ander geleenthede, het sosiale distansiëring soos 'n doodsvonnis gevoel. Ondanks dié uitdagings het Graan SA en die NAMPO Oesdag veerkragtig gebly en selfs 'n industrie-eerste en baie suksesvolle Virtuele NAMPO gedurende 2020 aangebied.

Geen planne of idees kom egter naby die ware Jakob nie. En hier staan ons op die vooraand van die 54ste NAMPO Oesdag, wat vir die eerste keer oor vyf dae aangebied word en ons is weereens in die bevoorregte posisie om landbou se nuutste tegnologie, masjinerie, innovasies en produktiwiteitsoplossings alles op een netwerkplatform ten toon te stel. Ons erken voorts dat met die toenemende tempo van verandering in baie aspekte van die lewe, besigheid- en ondersteuningsnetwerke van kardinale belang bly.

Die 2022-tema "Ervaar dit!" vervat 'n uitnodiging aan elke belanghebbende en vriend van landbou, na 'n intydse NAMPO Oesdag wat mense weer sal toelaat om met mekaar te skakel en ware, menslike ervaringe te geniet. Dit was nog altyd hierdie ervaringe wat besighede vorentoe dryf, hulle met die bedryf verbind en hulle in staat stel om met nuwe idees en innovasies vorendag te kom en samewerking te bevorder.

Aanvullend tot die Oesdag-program, fokus die Nasie in Gesprek-inisiatief daarop om rolspelers in die landbousektor byeen te bring, asook die geleentheid te bied om werklike en toepaslike plaaslike en internasionale kwessies te identifiseer en diep te delf om relevante en brandende landbou-kwessies te hanteer.

Na 'n suksesvolle deelname van tien jaar aan die NAMPO Oesdag, sien ons daarna uit om Nasie in Gesprek terug te verwelkom in sy nuwe en dinamiese formaat, wat vanaf 'n splinternuwe ateljee uitgesaai gaan word én gelyktydig regstreeks gebeeldsend sal word. Nasie in Gesprek beloof om 'n hoë-vlak netwerkervaring te wees en interaksie met baanbrekers in die industrie te bied. Net een van die redes hoekom jy nie die 2022 NAMPO Oesdag mag misloop nie, want dit is gerat om te doen wat dit die beste doen – om mense te verbind.

Soms is dit die beste om nie te weet wat die toekoms inhou nie, want geluk is nie aldag wat jy aan die einde van die pad vind nie. Dit is net die hier en die nou! Maak gereed om soos oudergewoonte fees te vier, want ons ongelooflike geleentheid maak 'n terugkeer! Ons kan nie wag om almal terug te verwelkom op NAMPO Park nie!

Vir ander is jy bekend as 'n boer, kliënt, vriend of kennis MAAR ONS, ONS KEN JOU AS FAMILIE



How to transition to a profitable, climate-resilient agribusiness



John Hudson, National Head of Agriculture at Nedbank

The need to produce food sustainably has gone beyond being the right thing to do - it is now a business imperative. But perhaps more importantly, sustainable farming reduces business risk by strengthening business resilience and mitigating against worsening climatic conditions in the future. Failing to climateproof this sector will have devastating consequences - significantly reducing the income from exports on which our economy relies, as more and more trading partners and consumers demand sustainably produced services and products; endangering jobs and livelihoods across the entire value chain; and posing a serious threat to food security.

While it is becoming increasingly relevant in the global economy, sustainability also brings wide-ranging business opportunities, including significantly boosting profitability. It may seem counterintuitive that spending more money on sustainable business practices equates to higher profits, but numerous studies show that the most sustainable companies are also the most profitable.

I'm sold. How do I start my sustainability journey?

As with any financing transaction, affordability is the overriding consideration when it comes to sustainability finance. Responsible financiers like Nedbank will always have the client's best interests at heart, as it is to no one's advantage to place a client or borrower in financial distress.

To ensure that clients get the best bang for their buck, it is imperative for agribusinesses to have their needs evaluated carefully. Bigger is not necessarily better, and in most cases supplementation of energy needs, for example, is preferable to 'going off the grid' or producing more than required until feeding into the grid becomes more accessible.

Staying with the energy example, the average pay-back period is six to seven years on renewable-energy equipment, but it's important to consider that affordability increases when the electricity savings the equipment generates are considered. In certain jurisdictions, it's possible to feed surplus electricity back into the grid, thus generating a reduction in electricity bills, which results in further improved cash flow to be considered when calculating the affordability of the equipment repayments.



The devil is in the detail

In our experience, there are some nuggets of sound advice that apply to all companies – regardless of size or sector – that are weighing up their options in the sustainability space.

- First identify and manage the 'low-hanging fruit': Applying the '3 R's' (the principles of reducing, reusing, and recycling resources and products) is an effective way of starting off on the sustainability journey. Start seeking out the simple, low-cost interventions such as installing grey-water systems and recycling wastewater for irrigation use, reducing fertilizer and pesticide use to improve soil health, and implementing an efficient waste management system that includes recycling and reusing where possible.
- Undertake an energy audit to identify energy guzzlers, consider scheduling usage in lower-tariff periods and use these efficiencies to fund more costly interventions. Bear in mind that the larger your agribusiness is, the higher the costs and the potential savings, and that it is possible to invest in sustainability equipment in phases. For example, install solar panels to generate electricity during daylight hours initially, with a view to installing the backup battery system at a later stage.
- When it comes to technology, get reliable references to ensure you're dealing with a reputable supplier and installer.

Shop around when looking for funding and look for finance specifically geared for sustainability inputs that consider longer-term payback periods and the cost reductions generated by the equipment itself. Our lending options in this space are proving extremely popular, with innovations including financing of renewable energy and efficiencies, specialised shadenetting finance and expert advice, technical assistance and finance solutions for sustainable agriculture transformation.

Climate change and sustainability are at the core of everything we do at Nedbank Agriculture, and our focus on water, energy and soil health are examples of how we are encouraging our clients to transition to sustainability through our lending. But we believe that our role goes beyond simply financing the transition: we use our banking expertise and understanding of the sector to raise awareness about climate risk and build the business case for sustainable farming, and we have frank discussions with our clients to advise them on future-proofing their businesses and to package funding solutions specific to their needs.

Doing more with less is imperative and will benefit us all, and the focus now must be on sustained production through the responsible use of the limited natural resources available to produce enough food for a burgeoning global population.





TUESDAY 17 MAY



SESSION 1 | ECONOMY

09h00 - 10h15

The state of the economy: Onwards and upwards

Die stand van die ekonomie: Voorwaarts, mars

The world economy is under pressure, and South Africa is not immune to the impact. Input costs are rising, consumer spending is cautious and general turmoil in world markets contributes to a sense of trepidation. Facilitator, Theo Vorster, will talk to renowned economic experts about the current state of affairs, where the opportunities are, and what needs to be in place to move forward.

Die wêreldekonomie is onder druk en Suid-Afrika is nie daarteen immuun nie. Insetkostes is aan die toeneem, verbruikersbesteding is waaksaam en onstuimigheid op wêreldmarkte dra by tot 'n gevoel van onsekerheid. Fasiliteerder, Theo Vorster, gaan gesels met gesiene kenners van die ekonomie oor die huidige stand van sake, watter geleenthede kan ontstaan, en wat in plek moet wees om vorentoe te beweeg.

Facilitator:

Theo Vorster - CEO: Galileo Capital

Panel Members:

- Kokkie Kooyman Portfolio Manager: Denker Capital
- Prof Ferdi Meyer Director: BFAP (Bureau for Food and Agricultural Policy)
- Hugo Pienaar Chief Economist: BER (Bureau for Economic Research)

SESSION 2 | CHEMICALS

11h00 - 12h15

Nature matters:

The responsible use of chemicals

Die natuur maak saak:

Die verantwoordelike gebruik van chemikalieë

Modern chemistry contributed to the agricultural evolution of the past century, but the responsible use of agri-chemicals should be top of mind for all producers, in creating a sustainable management strategy. Facilitator, Theo Vorster will talk to industry representatives about public perceptions of chemical use; the role of agrichemicals in environmental protection and sustainability; and oversight in the industry.

Moderne chemie het grootliks bygedra tot die landbou-rewolusie oor die afgelope eeu, maar die verantwoordelike gebruik van landbouchemikalieë moet bo aan die prioriteitslys van alle produsente se volhoubare bestuurspraktyke wees. Fasiliteerder, Theo Vorster, gaan met verteenwoordigers in die bedryf gesels oor die rol van landbouchemikalieë in boerdery en die belangrikheid van korrekte gebruik ten einde volhoubaarheid van die omgewing te verseker.

Facilitator:

Theo Vorster - CEO: Galileo Capital

Panel Members:

- Dr Klaus Eckstein CEO: Bayer Southern Africa
- Kobus Meintjes President: CropLife South Africa
- Egon Zunckel Director: Zunckel Farms
- Jaco Minnaar Farmer: Uitsny, Hennenman



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WEDNESDAY 18 MAY



SESSION 3 |

INFRASTRUCTURE & LOGISTICS

09h00 - 10h15

The state of the economy: Onwards and upwards

Die stand van die ekonomie: Voorwaarts, mars

From deteriorating rural roads and rail infrastructure to bottlenecks at harbours, South Africa's agricultural sector is negatively affected by a lack of investment in efficient logistics. Production areas are often far from the main consumers and export markets, and a breakdown in logistics can have dire consequences for producers. Facilitator, Theo Vorster, will ask industry experts about the impact of logistics on the sector and what can be done to overcome this challenge.

Suid-Afrika se landbousektor word benadeel deur 'n tekort aan beleggings in doeltreffende logistiek en hierdie uitdaging strek van landelike paaie en spoorinfrastruktuur se agteruitgang tot by grootskaalse oponthoude by hawens. Produksiegebiede is dikwels ver van die uiteindelike verbruiker en 'n ineenstorting van infrastruktuur kan rampspoedige gevolge vir produsente inhou. Fasiliteerder, Theo Vorster, praat met sy paneelgaste oor die impak hiervan op die bedryf en wat gedoen kan word om dié uitdaging te oorkom.

Eggilitator

Theo Vorster - CEO: Galileo Capital

Panel Members:

- Dr Pieter Taljaard CEO: Grain SA
- Dr André van der Vyver Executive
 Director: SACOTA (South African Cereals
 & Oilseeds Trade Association)
- Misumzi Xata Regional Operations Manager, Eastern Cape: PPECB
- Jan-Louis Spoelstra Representative: Flying Swans Foundation

SESSION 4 | RURAL COMMUNITIES

11h00 - 12h15

Let's fix it: The regeneration of rural communities

Kom ons maak reg: Die herlewing van plattelandse gemeenskappe

Consolidation of farming enterprises coupled with higher mechanisation is leading to fewer job opportunities in rural towns and rapid urbanisation. This leaves many rural areas in a state of disrepair because of a shrinking economic base and dwindling economically active population. Facilitator Theo Vorster will talk to experts about some community projects that made a difference, as well as how these projects can set an example for others to follow.

Die samesmelting van boerderye tesame met meer meganisasie lei tot minder werksgeleenthede in plattelandse gebiede asook tot versnelde verstedeliking. Dit laat talle landelike gebiede agteruit gaan weens 'n krimpende ekonomiese basis en minder ekonomies-aktiewe mense. Fasiliteerder, Theo Vorster gaan praat met kenners oor hul gemeenskapsprojekte wat 'n verskil maak, en hoe dié projekte 'n voorbeeld aan ander kan stel.

Facilitator:

Theo Vorster - CEO: Galileo Capital

Panel Members:

- Barend la Grange Chief Operating Officer: Privilege Foundation
- Lennox Plaatjies Director: Bambisane Farming & PALS Board Member
- Chris Burgess Editor in Chief: Landbouweekblad
- Theo Boshoff CEO: Agbiz



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THURSDAY 19 MAY



SESSION 5 | LIVESTOCK

09h00 - 10h15

Diversification and the integration of livestock

Diversifikasie en die integrasie van lewende hawe

Rising input costs will force some grain producers to look at diversifying their operations by introducing livestock. Integrating livestock into a grain business can add value to lower potential farmlands and improve overall cashflow. Facilitator, Theo Voster will talk to livestock specialists about the challenges, rewards and practical planning involved in this kind of diversification.

Stygende insetkoste kan sommige saaiboere noop om hul bedrywighede te diversifiseer deur vee as addisionele boerdery-faset by te voeg. Die integrasie van vee by 'n saaiboerdery kan waarde toevoeg tot laer potensiaallande en algehele kontantvloei verbeter. Die belangrikheid van vee in herlewingslandboupraktyke sal ondersoek word en fasiliteerder, Theo Vorster gaan praat met veekenners oor die uitdagings en voordele van só 'n integrasie.

Facilitator:

Theo Vorster - CEO: Galileo Capital

Panel Members:

- Dr Florence Nherera-Chokuda -Acting CEO: NERPO
- Dr Faffa Malan Virtual Veterinarian, Landbou.com
- · Gerrit van Zyl Owner: Hanzyl Bonsmaras
- Cobus van Coller Farm Libanon, Viljoenskroon

SESSION 6 | DATA

11h00 - 12h15

Data in agriculture: A new era

Data in landbou: 'n Nuwe era

Nearly all technologies are going digital, and data is said to be the commodity of the future. But what happens with the terabytes of data created by the thousands of sensors across your farm every day? And who owns this data? Facilitator, Theo Vorster will talk to data and technology specialists about managing and using data to improve efficiencies and decision making on the modern farm.

Byna alle nuwe tegnologieë is digitaal en daar word beweer dat data die goud van die toekoms is. Maar wat gebeur met die berge data wat elke dag deur die duisende sensors op jou plaas gegenereer word? En aan wie behoort hierdie data? Fasiliteerder, Theo Vorster, gaan praat met dataspesialiste oor die bestuur en gebruik van data om doeltreffendheid en besluitneming op die moderne plase te verbeter.

Facilitator:

Theo Vorster - CEO: Galileo Capital

Panel Members:

- Gerhard van der Burgh Data Science & Systems Integration: BFAP
- Estelle Lubbe CXO: The Awareness Company
- Alf White Group Executive, Digital Transformation: Senwes
- Stehan Cloete Manager, Region 1
 Technology Strategy: John Deere AME

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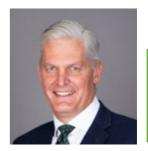
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FRIDAY 20 MAY



SESSION 7 | YOUTH

09h00 - 10h15

The future of agriculture: A new generation

Die toekoms van landbou: 'n nuwe generasie

A country's future lies with its youth, and with an aging agricultural sector, newcomers to the industry are sorely needed. Facilitator, Wandile Sihlobo, will ask experts in this field about the youth's perception of agriculture, hurdles they must overcome and the future prospects of agriculture as a career choice.

'n Land se toekoms is afhanklik van sy jeug en met 'n ouerwordende landbousektor is nuwelinge in die bedryf broodnodig. Fasiliteerder, Wandile Sihlobo, gaan 'n paar kenners op die terrein uitvra oor jongmense se siening van landbou, struikelblokke wat hulle moet oorkom en die vooruitsigte vir landbou as 'n loopbaankeuse.

Facilitator:

Wandile Sihlobo - Chief Economist: Agbiz

Special Opening Address

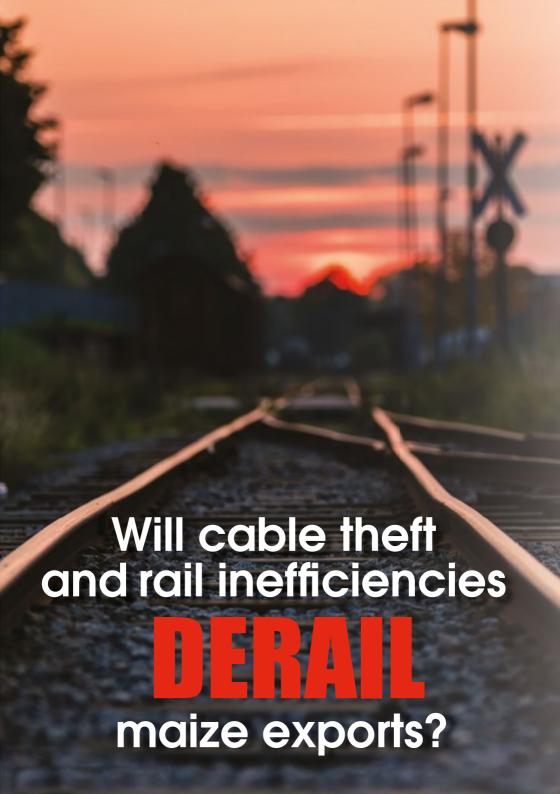
Jannie de Villiers

Panel Members:

- Sinelizwi Fakade MD: Rocky Park Farming Group & Founder: Ukhanyo Farmer Development
- Dr Johnny van der Merwe Managing Director: AMT
- Dr Tracy Davids Manager, Commodity Markets & Foresight: BFAP







Dr André van der Vyver, director, South African Cereals and Oilseeds Trade Association (SACOTA)

In order to better comprehend the impact of rail cable theft on the maize industry, the importance of the maize export programme and the necessity of an efficient maize value chain have to be understood as well.

Near record production in 2021

Producers achieved a near record maize crop in 2021, amounting to 16,2 million tons. This has only been surpassed by the record of 16,8 million tons produced in 2017. Annual production has and will probably remain volatile. By comparison, in the drought year of 2016, only 7,8 million tons were produced – not nearly enough to meet the local demand.

During the past twelve years, local demand has remained stable and has grown steadily from 8,9 million tons in 2011 to 11,4 million tons in 2021. This signifies an average growth rate of 2% per year. Some analysts say that one should add the cross-border Southern African demand to this number. Even if one does, it is worth noting that it only comprises about 6% to 7% of South Africa's local demand.

Accumulation of stocks

As a result of the large 2021 crop, South Africa suddenly found itself in a position where it was likely to accumulate a large exportable surplus. Since the drought of 2016, deep-sea exports had varied between 0,2 million and 1,7 million tons per year, while in the same period, exports to Southern African countries had varied between 0,6 and 1,4 million tons. With another good crop year in 2021 following on that of 2020, and with sufficient carry-over stock levels of 2,1 million tons as at 1 May 2021, the focus quickly shifted to deep-sea exports.

Initial predictions at the time showed that South Africa had an exportable surplus of about 4 million tons, after provision had been made for 2 million tons of carry-over stock on 30 April 2022. This was more than the logistical capabilities of the South African harbours.

Declining market prices to facilitate export deals

The market was quick to recognise this and since about April/May 2021, prices have traded lower to export parity and below. This enabled the traders to book export deals.

Traditionally the optimal period for South Africa to export maize is May to October, before the new crop in the United States is harvested and prices come under pressure. However, partly due to prices trading at export parity in South Africa and higher international prices, exports were booked into early 2022. The latest predictions are that South Africa will have deep-sea exports of about 3,0 million from May 2021 to April 2022. May 2022 signals the start of the new marketing year, as well as the start of the new harvest. All available vessel slots have already been booked until April 2022 and are included in the above prediction. This will generate approximately R14 billion in foreign exchange for the country.

High international prices combined with improved production technology and high yields in 2021, meant that many producers in the eastern Free State, parts of KwaZulu-Natal and southern Mpumalanga could sell for the export markets and still make a profit. The average yellow maize JSE/Safex July 2021 contract price from 1 June to 22 July 2021 was R3 317/ton. The average yellow maize yield for the Free State according to the Crop Estimates Committee (CEC) was 5,95 t/ha. If the Grain SA production cost survey for 2020/2021 is used to substitute these numbers in the calculations for the eastern Free State, producers would have made a profit of R692/ton. This includes the Grain SA provision for overheads of R398/ton and excludes any premiums achieved on the export lines. 2













Calculating export parity

Key elements in determining whether traders could profitably execute deep-sea contracts are (1) where the maize is located; (2) the premiums payable for suitable locations; and (3) ease and cost of moving the grain to Durban. Of course, there are other factors, but traders either have little or no control over factors like market prices or the exchange rate. Then there are factors of which the cost impact is fairly constant, like the terminal cost to load a vessel. This compares to the above three factors where trading experience and skills may make a difference in concluding a successful deal.

Map of main and branch lines

Maize for exports is normally sourced in KwaZulu-Natal, the eastern Free State and southern Mpumalanga. The cost and efficient execution of transporting maize to Durban form a very important part of the export calculation. The objective for the trader is to source maize close to or on the main transport routes to Durban. It is worth paying a premium for this maize. The saving in transport cost, availability of trucks, transport time to Durban, efficiencies at the export silos, backloads for transporters, et cetera, more than compensate for the premium.

These areas also traditionally have a well-developed rail transport network. The latter has also been well maintained in comparison to other areas. The area and silos most popular and operationally active are depicted in Figure 1 (on page 29). Note that the main line between Bethlehem and Harrismith and the three branch lines and the silos on these lines are the most sought after.

Cost and efficiencies of transport

Why still load by rail? Silos were designed to off-load producer deliveries (intake) while simultaneously loading rail wagons for out-loading. If the silos out-load by road, they have to stop the producer deliveries. One can also load many more rail wagons in a

much shorter period of time than road trucks. It is also much more efficient for the harbour terminals to off-load rail wagons than road trucks. Moreover, road trucks cause huge congestion in the harbour area and the city of Durban as well as increasing the cost of maintenance of the roads.

With 220 000 tons exported every month and an 80/20 split in road supply versus rail, approximately 5 100 interlink road trucks use the N3 to off-load in Durban harbour every month. Lastly, electrical locomotives are significantly cheaper than road trucks powered by diesel. The rate per ton by rail wagon from say Reitz to Durban, is approximately R255/ton. This compares to the current road truck rate of approximately R420/ton.

Export terminals

South Africa currently has three operational import/export bulk grain terminals, all situated in Durban. These are Agriport, belonging to Transnet Port Terminals (TPT), a state-owned entity, and two terminals belonging to South African Bulk Terminals (SABT), namely SABT Island View and SABT Maydon Wharf. SABT is a subsidiary of the Bidvest Group, a public-listed company. Given draft and silo capacity restrictions, for the purpose of exports, SABT Island View is the only terminal that can handle a supramax vessel of 50 000 to 55 000 tons. If a vessel loads at Agriport, it normally loads about 40 000 tons and then 'tops up' at Island View. SABT Maydon Wharf is mainly used for imports, but does load exports - in which case it also has to 'top up' at Island View. The draft at Island View is 12,2 m, at Maydon Wharf it is 9,5 m and at Agriport it is 10,0 m.

Rail capacity at terminals

SABT Island View can handle 96 rail wagons or 4 224 tons per day, five and a half days per week, averaging out to approximately 23 000 tons per week. Agriport can theoretically handle 48 wagons a day if it cuts back on road. For now, Agriport has

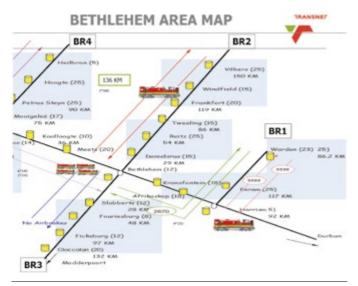
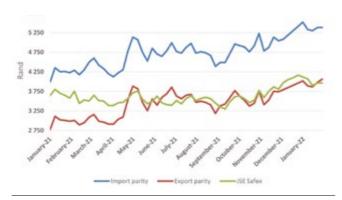


Figure 1: The area and silos most popular and operationally active.



Graph 1: Maize prices relative to import and export parity.

requested Transnet Freight Rail (TFR) to supply it with a train a day (or 32 wagons), which it will offload in combination with road. Due to refurbishments in 2021 and lack of availability of rail wagons, it did not receive any wagons during last year and is still negotiating with TFR for this year. If Agriport is left aside, in ideal circumstances SABT should receive approximately 92 000 tons per month

programme is running at full capacity, as it has been since May 2021.

The direct cost, based on the transport rate differential, amounts to R6,6 million per month

Impact of cable theft

Looking at the grain loaded by TFR in the period 2 August to 26 September 2021, TFR averaged 16 500 tons per week. The export programme at that time was already in full swing. Not quite what SABT can handle, but still a verv reasonable volume. This changed dramatically when the cable theft started in September 2021. Average volumes have declined by 61% to 6 500 tons per week since then.

The direct cost, based on the transport rate differential referred

to above, amounts to R6,6 million per month. This is the difference between what was achieved by TFR in August and early September 2021, and the average since then. However, to get the full picture, the cost of lost TFR business on the potential volumes (the 92 000 tons per month minimum) versus the actuals of 26 000 tons per month (on average



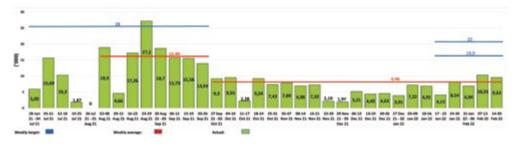




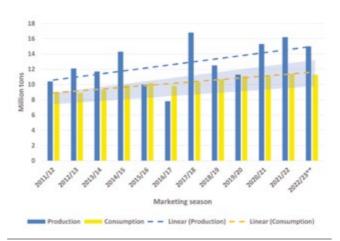








Graph 2: Grain performance and forecast.



Graph 3: South African local supply and demand for maize (2011/2012 to 2022/2023).

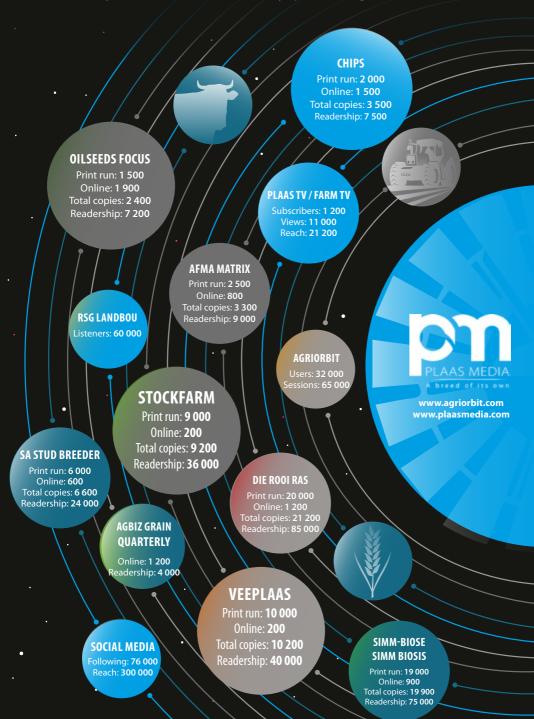
since September 2021) should also be calculated. The difference in tons would then be 66 000 or R10.9 million in additional transport costs per month. In the latter calculation, not all inefficiencies should be attributed to cable theft. but also to factors such as locomotive breakdowns, connections between sidings and branch lines as well as shortages of locomotive drivers. For example, Afari has 70 silos with rail sidings. The sidings have all been maintained, but only 30 have operational connections with the branch lines. The building of lines into sidings is a TFR responsibility in conjunction with the siding owner. Of the 30, only 14 have been used in the last six years.

Cable theft has also brought enormous maintenance cost implications for TFR. It costs approximately R500 000 in material to repair a kilometre of stolen cable. About 60 km of cable have already been stolen, meaning that roughly R30 million on material and another approximately R12 million have been spent on maintenance teams, according to TFR. Sub-stations are also

sabotaged so that the line goes dead for the criminals to cut it more easily.

The situation is so dire that due to repeated incidents after repairs to the line, TFR has been forced to de-electrify the line between Bethlehem and Harrismith, withdraw the electric locomotives, and replace them with old diesel locomotives. Loaded wagons are now taken to Harrismith by diesel locomotives, where they are handed over to electric locomotives, while the diesel locomotives go back to fetch more loaded wagons. Collectively everything leads to more inefficiency.

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Outlook for 2022

The longer-term outlook for South African deep-sea maize exports has turned positive. The reason is that with modern production technology, the average growth in production exceeds the average growth in demand (see Graph 3 on page 30). Barring a serious drought, it is likely that going forward, South Africa will be in the export market every year.

Also, the deep-sea export outlook for the new season starting 1 May 2022, is very promising. This is despite heavy rains and flooding experienced by producers in December 2021 and January 2022. Seven SACOTA trading members surveyed on 26 January 2022, on average were predicting a total maize crop of 15,01 million tons, although March 2022 is still an important growing month (range 14,5 million – 15,5 million tons). Export slots are already fully booked for May and June 2022 and indications are that some traders have already secured deals for July 2022 and beyond. If the 500 000 tons that should go out in May and June are deducted, as well as local and Southern African demand, and provision for ending stocks is made (30 April 2023). South Africa is likely to remain with an additional exportable surplus of 2.5 million tons.

Collaboration between SACOTA, TFR, Grain SA and industry

There is a silver lining to the dark cloud. In September 2021 SACOTA initiated a semimonthly meeting with TFR. It also organised an industry planning workshop in January 2022. The main outcome was that TFR has agreed to engage with industry on opportunities for collaboration in combatting the cable theft issue. Furthermore, TFR internally approved additional security measures in February.

In Graph 3 an uptick in TFR performance during February can already be seen. Thanks also to the initiative of the Grain SA CEO, Dr Pieter Taljaard, a security meeting has been scheduled to take place with the farmer security control rooms in the Bethlehem area during March. TFR's security division and the South African Police Service will participate and take the lead in combatting cable theft.

Given the positive outlook for grain exports, the contribution grain exports can make to rural employment and development, and the need for an efficient and functional export value chain, the industry owes it to South Africa and its people to ensure that there is an efficient rail system.





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AGRICULTURAL EMPLOYMENT BRIEF

BFAP's Agricultural Employment Brief interprets and contextualises the latest quarterly labour force survey from StatsSA and provides insights on the major factors driving agricultural employment.



The Agricultural sector remains one of the most resilient sectors in terms of job creation, coming at a time when unemployment levels are worsening in South Africa. Evidence suggests that farms and agro-processors created employment during 2020 and 2021.

Statistics South Africa (StatsSA) published the delayed Quarterly Labour Force Survey results on 29 March 2022 for the final quarter of 2021. In this Agricultural Employment Brief we analyse the quarterly and annual changes in the agriculture sector and provide some insights into the main drivers of these changes.

South Africa's unemployment situation continues to deteriorate with the official unemployment rate in the fourth quarter of 2021 increasing to 35.3%. Unfortunately, the number of unemployed keep on growing at a rate faster than the economy can create jobs and worryingly, the number of discouraged work-seekers remains at elevated levels – more than 3.8 million South Africans of working age. Thus, 44.6% of the county's total labour force cannot find, or have stopped looking for, jobs.



The encouraging news is that a few industries have actually managed to grow their employment base, with the agricultural sector amongst them. In the past quarter around 38 000 jobs were added to end 2021's aggregated total at 2% higher than 2020 for the full year. The only other industries that had a net positive employment creation impact in the past

year were transport, finance and private households (mainly domestic workers).

We noted in our Brief in quarter 2 and 3 of 2020 that there was anecdotal evidence that the surveying methodology changes applied during COVID-19 lockdown negatively affected farm employment coverage.

Annual comparisons between Q2 & Q3 of 2020 compared to 2019 in the QLFS suggested that around 70 thousand farm worker jobs were lost, which we explained does not align with the strong economic growth in the agricultural sector at that point in time.

Additional data that was recently released by StatsSA in the form of the Agricultural Survey for 2020 confirms our suspicion. Up until the end of June 2020 and compared to 2019, farm employment increased from 765 269 to 777 879, according to this newly available source, thus adding jobs to the sector. The implication is that care should be taken to interpret the labour force survey trends from 2020 quarter 2 onwards. Figure 2 below shows these agricultural labour market trends for both the broader Agriculture, Forestry and Fisheries sector, as well as for farm workers in particular. In the final quarter of 2021, agricultural employment increased 7% compared to 2020. The average level of agricultural employment for 2021 was 838 000, marginally higher than the 829 000 in 2020. The total number of farm workers increased by 3.8% during 2021.









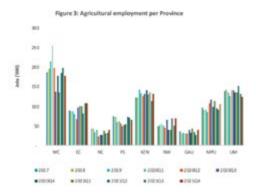






It is therefore our view that the agricultural sector created jobs in both 2020 and 2021, despite the QLFS statistics suggesting negative growth in 2020. This is in line with the findings from the Agricultural Survey (2020) as well as the most recent release of GDP numbers showing continued real agricultural GDP growth in the sector of 8.3% in 2021.

Noting the challenges with the QLFS statistics, Figure 3 proceeds with a breakdown of agricultural employment within provinces for the past few quarters. The biggest positive contributions to employment between Q4 in 2021 and 2020 were seen in North West (76%), followed by Northern Cape (45%) and the Free State (24%). This performance reflects strong output growth in the grain and oilseed industries in the past year. Slight negative employment growth was recorded in Limpopo and Kwa-Zulu Natal.



For the final section in this Quarterly Brief we assess an additional measure of employment in the wider agricultural value chain by including trends from another StatsSA publication tracking employment with the Quarterly Employment Statistics. The benefit of using this survey is that it captures agro-processing employment using another survey methodology over the same period as the QLFS.

One would expect that if there were large-scale job losses in the primary agricultural sector as suggested by the QLFS in 2020 that this would also translate into fewer jobs in agro-processing industries.

Figure 4 includes the aggregated employment numbers for all the major food and beverage subsectors.

The trend suggests a definite increasing trend in employment after the impact of the 2009 financial crises and when the South African economy was growing at decent levels. Unfortunately, employment growth in food and beverages have somewhat slowed in recent years, but there was no significant decline in employment in the agroprocessing industries as a result of COVID-19.

This job performance in the agro-processing sector stands in stark contrast to rest of the manufacturing sector, which employed 931 000 people in 2019 but only 861 000 in 2020. In 2021 there was a slight recovery back to 891 000 jobs, but the net loss was still close to 40 000 as a result of COVID-19. Again, this points to the resilience of both the farming and agro-processing sectors to maintain the level of employment in the past two years.

In Conclusion...

We maintain our view that agricultural employment statistics from the Quarterly Labour Force Survey need to be revisited, especially for the period after the pandemic started. Evidence is emerging that, due to agriculture's strong growth performance in the past two years, employment has been increasing. This again highlights the important contribution the agricultural value chain is making towards employment, particularly when most other sectors are shedding jobs.

