



AGRICULTURAL POLICY ACTION PLAN (APAP)



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forestry & fisheries

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REPUBLIC OF SOUTH AFRICA



17 OCTOBER 2014



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Introduction and Background

- Cabinet (July 2013) resolved for Agriculture to develop a plan that addresses the vision of the National Development Plan and New Growth Path.
- As identified within the National Development Plan and New Growth Path, Agriculture, remains critical for employment and food security.
- Agriculture delivers more jobs per Rand invested than any other sector, and NDP estimates that Agriculture could potentially create, 1 mill jobs by 2030.
- The Integrated Growth and Development Policy (IGDP) serves as the sector policy, and the Agricultural Policy Action Plan (APAP) as a programmatic response to key policy documents including:
 - National Development Plan (NDP); New Growth Path (NGP) as a job driver
 - Medium Term Strategic Framework - Outcomes 4, 7 and 10.

New Growth Path (NGP)
Ind. Policy Action Plan (IPAP)

National Development Plan (NDP)

MTSF (2014-2019) of Outcomes

Outcome 4 - Decent Employment through inclusive growth
6 Job Drivers

Outcome 7 - Comprehensive rural development and food security

Outcome 10 - Environmental assets and natural resources protected and continually enhanced

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Agriculture Productive Sector Forum

Infrastr. Pres. Infra. Co. Comm. (PICC)

Mining (Mining Policy Action Plan)
Manufacturing Industrial Policy Action Plan (IPAP)
Tourism and Green Economy

IGDP (Policy Framework)

Agric Policy Action Plan (APAP 5 yr iterative plan)

SIP 11





Vision 2030 of the National Development Plan (NDP) calls for an inclusive rural economy wherein:

“...rural communities should have **greater opportunities to participate fully in the economic, social and political life of the country**. People should have access to high-quality basic services that enable them to be well nourished, healthy and increasingly skilled. **Rural economies will be supported by agriculture, and where possible by mining, tourism, agro-processing and fisheries...better integration of the country's rural areas, achieved through successful land reform, job creation and poverty alleviation**”

- The NDP, chapter 6 sets out clear targets and actions.
 - ▣ It identifies 600 000 potential jobs in communal areas, and 300 000 jobs through commercial agriculture.



NDP – Where will the jobs come from

TARGET GROUP	PRIMARY JOBS CREATED	SECONDARY JOBS CREATED
Subsistence farmers with <0.5 hectares	83 000	41 500
Small-scale farmers with between 0.5 and 5 hectares of land	<u>165 000</u>	82 500
Small-scale farmers with >5 hectares of land	<u>75 000</u>	37 500
Better use of redistributed land	70 000	35 000
Labour intensive winners	<u>200 000</u>	100 000
Labour-extensive field crops	10 000	5 000
Labour extensive livestock	40 000	25 000
TOTAL	643 000	326 500
GRAND TOTAL	969 500 jobs	
COMMUNAL AREAS and LAND REFORM	589 500 jobs	
COMMERCIAL AGRICULTURE	380 000 jobs	



- **The NDP sees agriculture as having the potential to create close to 1 million new jobs by 2030**, a significant contribution to the overall employment target. To achieve this target the NDP identified the following key activities:
 - **Expand irrigated agriculture:** Evidence shows that the **1.5 million hectares under irrigation** (which produce virtually all South Africa's horticultural harvest and some field crops) can be expanded by at least **145 000 hectares** through the better use of existing water resources and developing new water schemes.
 - **Underutilised land in communal areas and land-reform projects for commercial production.** Better land use in communal areas could improve the livelihoods of at least 370 000 people, and create around **600 000 potential jobs in communal areas.**
 - Pick and support commercial agriculture sectors and regions that have the highest potential for growth and employment – **300 000 potential jobs in commercial agriculture.**
 - **Support job creation in the upstream and downstream industries.**





- **Find creative combinations between opportunities.** For example, emphasis should be placed on land that has the potential to benefit from irrigation infrastructure, and priority should be given to successful farmers in communal areas, which would support further improvement of the area; and industries and areas with high potential to create jobs should receive the most support. All these will increase collaboration between existing farmers and the beneficiaries of land reform.
- **Develop strategies that give new entrants access to product value chains and support from better-resourced players.**





NDP Winners

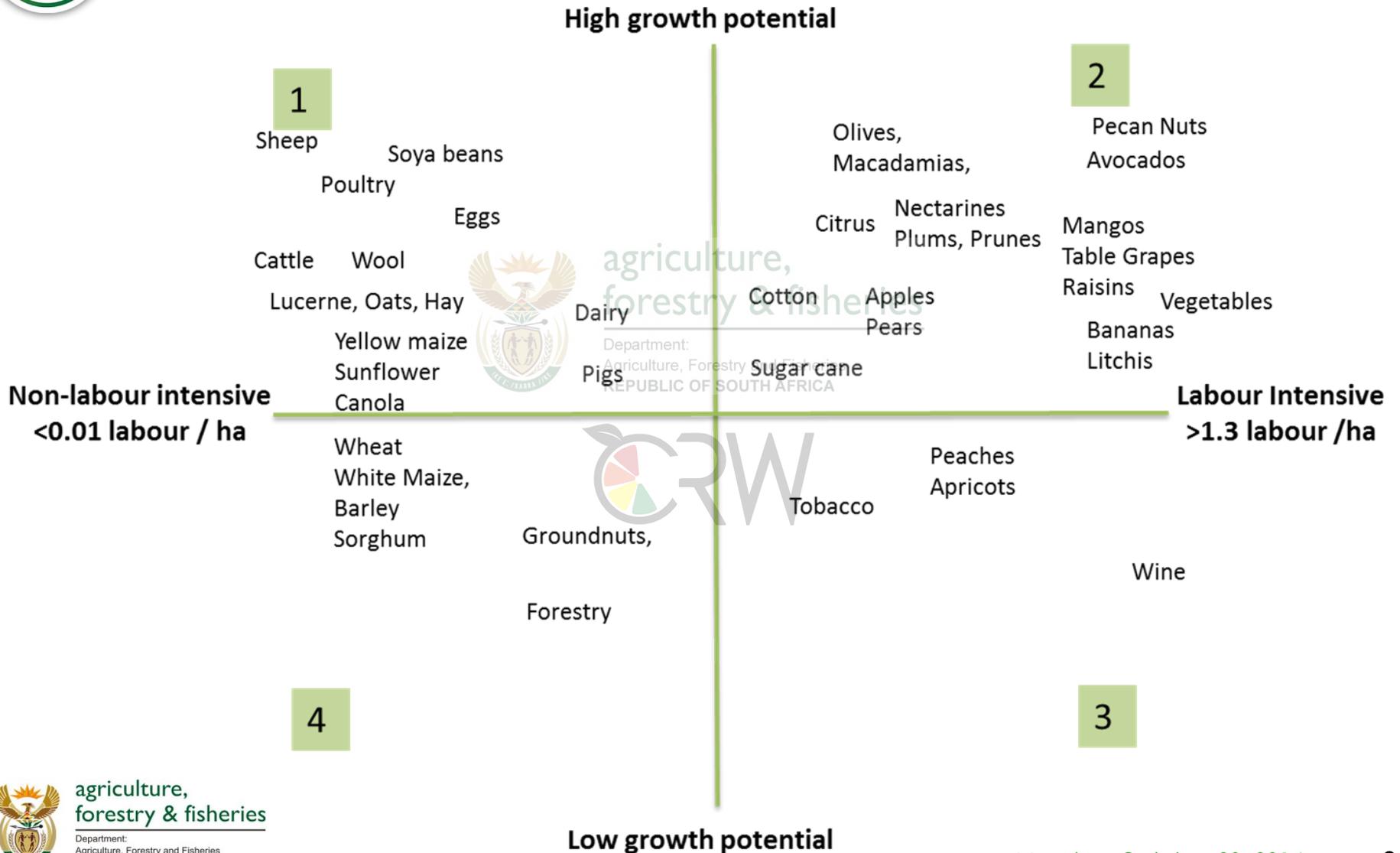
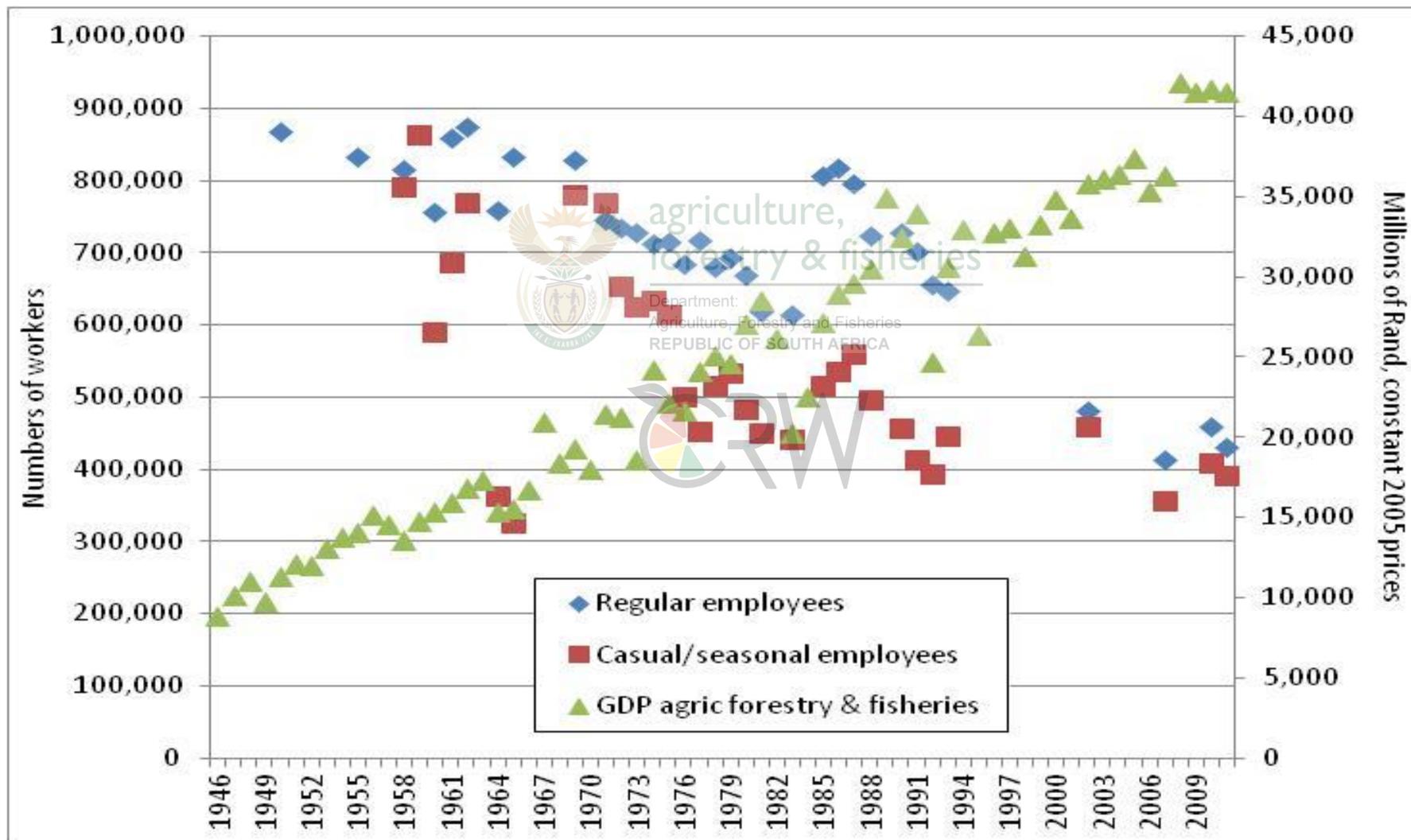
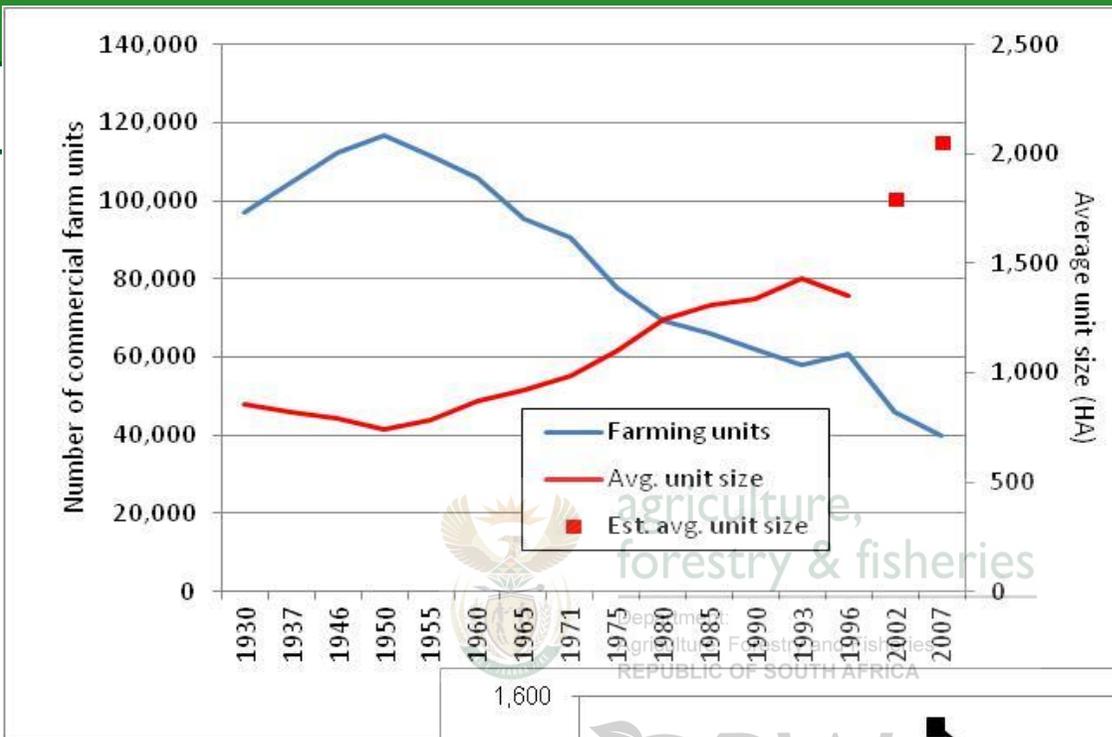




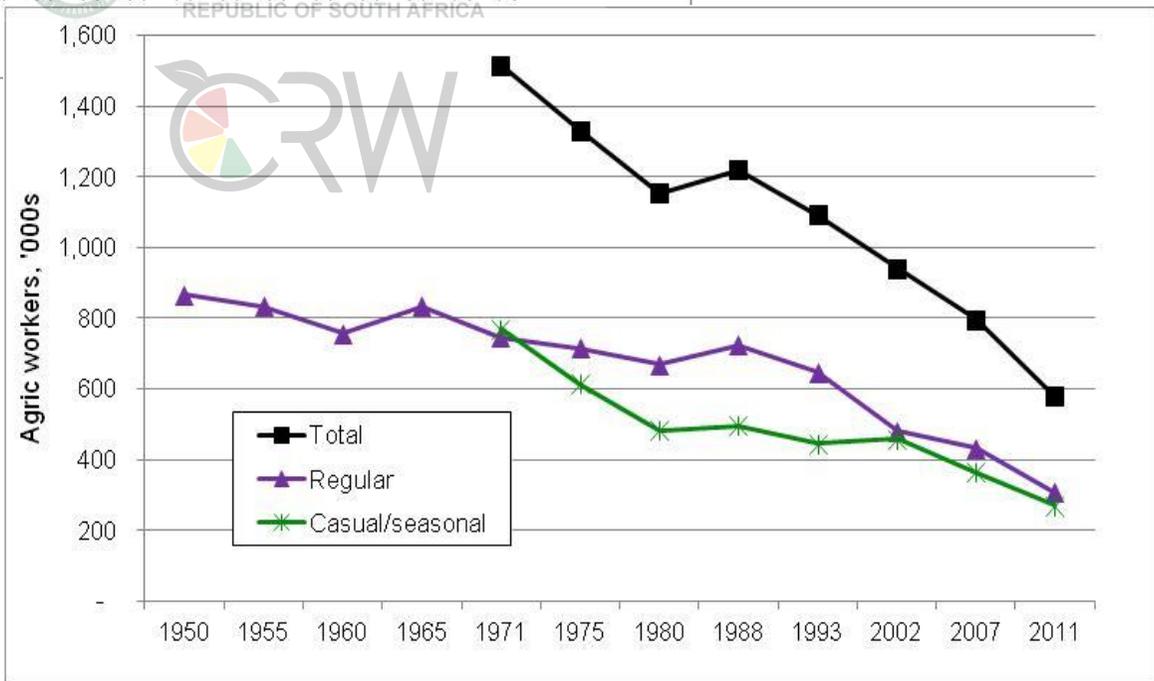
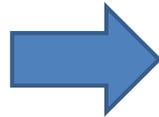
Figure 1: Growth and employment trends in commercial agriculture





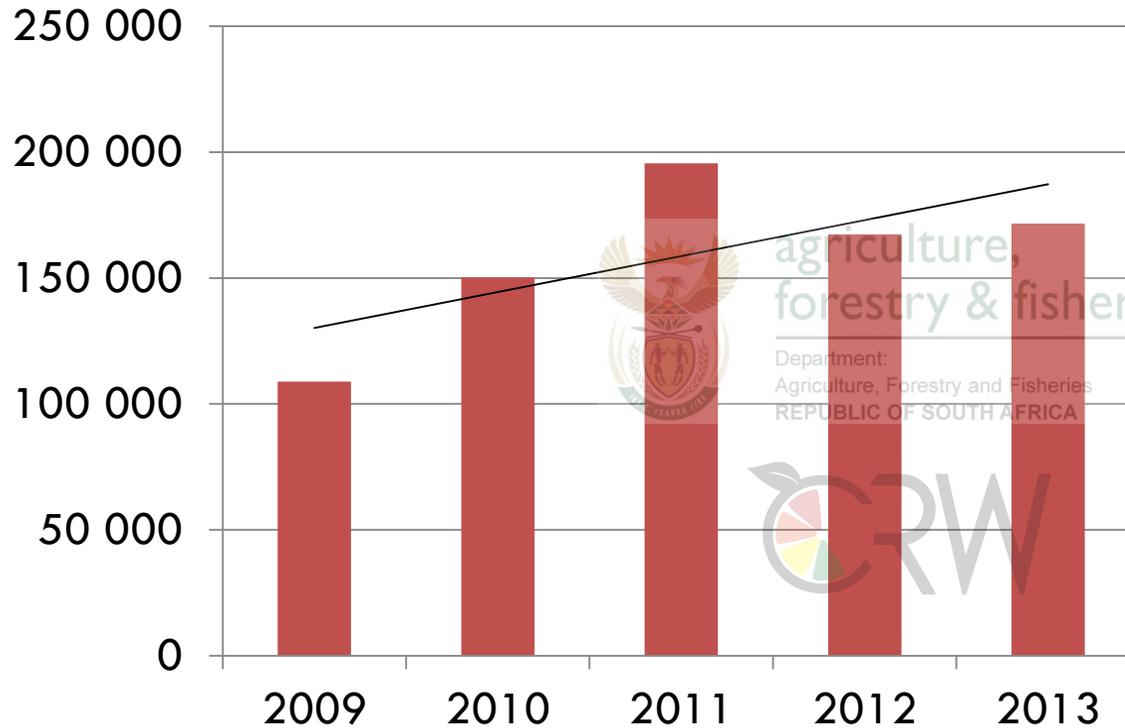
There is a direct relationship between the changing structure of the commercial farm sector

... and job shedding on commercial farms





There are good indication that no. of Smallholders are increasing



According to GHS (with some refinements), increase in smallholder HHs since 2009 is impressive (37%)

The number of smallholder households in 2003 is 58% greater than in 2009.

Source: Michael Aliber, 2014



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Agri-business - *The problem of dominance*

	CR4 	CR10
Agro-processors		
Food products and beverages	30%	40%
Prodn, processing & preserving of meat, fish, fruit, veg, oils & fats	30%	43%
Dairy products	71%	81%
Grain milling products, starches and starch products etc	70%	79%
Bakery products, sugar, chocolate, etc	58%	84%
Beverages	80%	86%
Textiles, clothing, leather and footwear	17%	23%
Wood, wood products, paper, publishing and printing	30%	41%
Agro-input manufacturers		
Fertilisers, nitrogen compounds, plastics and synthetic rubber	87%	92%
Agricultural and forestry machinery	23%	33%



Source: Michael Aliber, 2013

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Summary of Problem Statement

- Comparing the 5-year period of 2008-12 to that of 1991-95, field crop production has increased by 28% by volume, horticultural production by 61%, and animal products by 30%.
- Forestry, meanwhile, grew even faster than agriculture in terms of its contribution to gross value-added, while the fisheries sector recovered considerably after negative growth over much of the 1990s.
- More impressive still, over this same period, net farm income increased by 80-90% on an inflation-adjusted basis.
- Our concern is that SA is increasingly relies on imports of crops (wheat) and livestock products (poultry), while agric increasingly relies on imports of inputs (e.g. fertiliser, feed, mechanisation). We need to look at more sustainable and productive sector.
- We need to strengthen our competitiveness by supporting localization where we have the potential.
- Need to promote agricultural development in manner that translates into rural development and poverty alleviation .
- Need to find better balance between large-scale and small-scale subsectors, thus broadening market participation.





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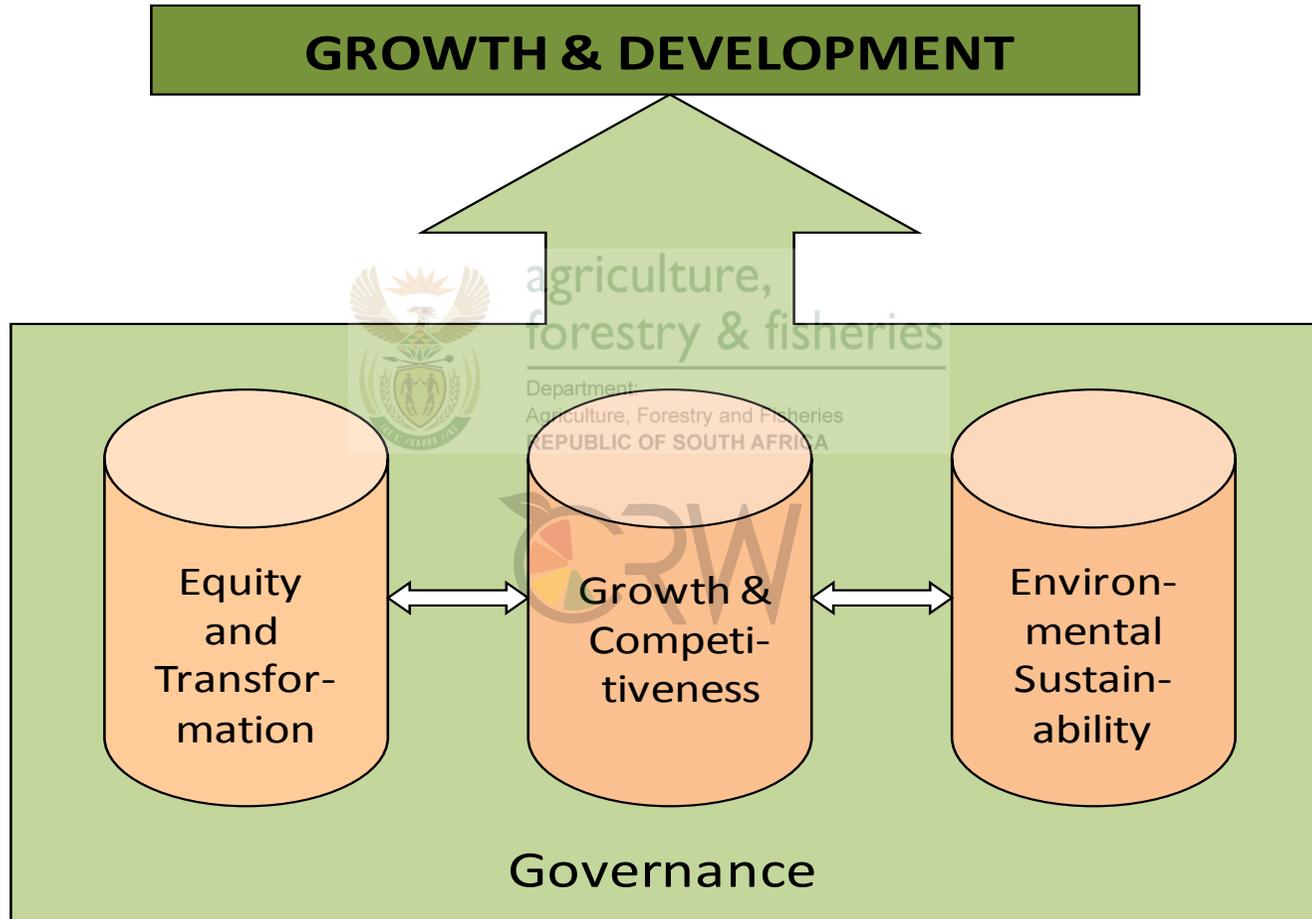
APAP'S KEY POLICY LEVERS

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“An equitable, productive, competitive, profitable and sustainable Agriculture, Forestry and Fisheries Sector” growing to the benefit of ALL South Africans”.





Ensuring a more producer-friendly (and consumer-friendly) market structure

- While South Africa is fundamentally a market economy, government must take the lead in ensuring that markets develop in a manner that is more inclusive, i.e. broadening marketing participation.
- Most of the commodities in agriculture suffer of severe market dominance, lending itself to job loss. There is a correlation between capital intensive models and job loss.
- We however recognise that agriculture will not turn away from mechanisation – but we can alleviate our over dependence on high input requirements.
- The knock-on effect of pricing structures (prices set at import parity) on the livestock and meat industry requires government intervention – more especially in the animal feed and fertiliser industries. There is further evidence of dominance.
- Seeking to broaden market participation by forging a better linkage between corporates and SMMEs across the value chain.
- Within the agriculture, forestry and fisheries sectors, this means a range of investment, institutional and regulatory interventions aimed at levelling the playing field e.g. Fertiliser act, AgriBBBEE



Accelerating implementation of the Charters and the Small-scale fisheries policy

- These instruments must be implemented to greater effect through closer monitoring and enforcement (which for AgriBEE is now possible thanks to the finalisation of the Sector Code in terms of Section 9 of the BBBEE Act)

Promoting local food economies

- Promoting local food economies as a means of creating marketing efficiencies, lowering food prices paid by consumers, and stimulating local production where it falls short of potential. Whether this means establishing alternatives to existing market structures, or working to influence existing market structures, remains to be determined.

Investment in agro-logistics

- Vital aspect of agro-logistics falls within other SIPs, namely the rehabilitation of freight rail for transport of bulk agricultural commodities.
- It is also critical in determining access to market opportunities, lowering cost to business, and the overall competitiveness of the sector





Promoting import substitution and export expansion through concerted value chain/commodity strategies

- South Africa imports large amounts of poultry, red meat, wheat and soya cake from abroad. While it makes sense to import that which we need and cannot produce efficiently domestically, it is sometimes the case that we are not reaching our potential, as in the case of the above-mentioned commodities.
- Long-term Commodity strategies thus becomes an imperative, and in turn the alignment between APAP Commodities, PDAs strategies, and planning of LandReform, and other grant funds such as CASP, LandCare etc. becomes critical in the efficient management of limited resources





Reducing dependence on industrial and imported inputs

- A large share of these inputs are either imported or have a high import-content. Over the past two decades, the share of fertilisers that are imported has grown dramatically. Farmers are thus vulnerable to international price fluctuations, which tend to trend upwards more rapidly than commodity prices.



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Increasing productive use of fallow land

- Fetsa Tlala, Land Reform, and Recap



- ***Strengthening R&D outcomes***



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Climate Smart Agriculture

- To aid in the sustainable management of our natural resources, ecosystem-based management (EBM) will be adopted.
- The conservation planning process that aims at conserving key natural forests, thickets and woodlands is still in its early stages and will have to be advanced during the next five years
- For agriculture, there are a number of well-developed approaches which are variations on a theme, in particular 'climate-smart agriculture',
 - The IGDP takes a non-prescriptive view of these and encourages all of them. However, from the perspective of pursuing a pragmatic approach to shifting towards EBM on a large scale in the foreseeable future, the IGDP declares government's intention to especially push climate-smart agriculture generally, and conservation agriculture specifically



Support services

- There is a clear gap in terms of monitoring the effectiveness of the support programmes and the impact these programmes have on the sector. Information in this regard should be collected and analysed to assist decision making in terms of appropriate interventions to address the challenge.

Skills development

- The absence of the correct and required skills, compromises the productivity and effectiveness of government and industry.
- Realignment of Extension support to a commodity approach

R&D

- Existing institutions have major capacity constraints and experience difficulties in attending and retaining scientists. R&D projects are not coordinated, and alignment to government and industry priorities need to be improved on





Knowledge and information management (integrated spatial economic planning)

- Access to information also remains a challenge, especially for small-scale producers, which affects their productivity and competitiveness. Inadequate information also has a negative impact in terms of government's ability to plan support interventions, identify priority areas where interventions are required and therefore maximise the impact of these interventions. The lack of knowledge systems also limits the scope of options to be considered in terms of best practices, interventions and marketing.

Market access, information and regulation

Institutional arrangements – a more integrated approach



Criteria for selection: contribution to food security, job creation, growth potential, and potential contribution to trade balance (incl. via import substitution)

- ❑ Red Meat Integrated Value Chain
- ❑ Poultry Integrated Value Chain
- ❑ Fruit and Vegetables
- ❑ Wine
- ❑ Wheat
- ❑ Forestry: Category B&C refurbishment and forest protection strategy
- ❑ Fisheries: aquaculture and small-scale fisheries schemes
- ❑ Biofuels





Purpose: To begin to address growing concentration within the market which impacts job creation, transversal action programmes seeks to localise food networks, through infrastructure development, incentivising support for SMMEs and small-scale producers across agriculture, forestry and fisheries value chains, and by supporting first entry into the market.

- Fetsa Tlala
- Climate Smart Agriculture
- Trade, Agri-business Development and Support
- Biosecurity
- SIP11
- Research and Innovation
- Land reform



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- APAP seeks to provide both a long-term vision, and focused interventions in a 5-year rolling schedule, to be updated annually.
- Similar to IPAP, APAP is based on Sectoral Key Action Programmes (commodities) and Transversal Key Action Programmes (e.g. research and innovation).
- It furthermore presents institutional arrangements and processes for achieving this objective – more especially to integrate planning, M&E between DRDLR and DAFF across 3 spheres of government.
- We improving on the document - each Key Action Programme in APAP has;
 - ▣ Problem Statement
 - ▣ Aspirations (*new*)
 - ▣ Policy Levers (*new*)
 - ▣ Nature of Interventions
 - ▣ Key Outputs (actions)





APAP Priority Value Chains and Transversal Action Programmes



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Problem Statement:

- Globally poultry is expected to account for more than half of meat consumption - SA's consumption of white meat has increased far more rapidly than that of red meat, and **this pattern is expected to expand by 34% by 2023 = 2.6 million tons = 50kg per capita. However production is only expected to expand by 2 million tons by 2023., meaning we will have to import 680 000 tons by 2023.** Unfortunately, much of this increase has been by way of imports, especially of low-cost frozen portions.
- Poultry production systems has a **high dependency on imported feed grains for animal feed**; more particular imported soya oil cake which led to an increase in **animal feed prices by 130%** - and about **63% of soya oilcake imported.**

Strategy:

- **Potential for import substitution** is thus vast, considering the potential impact of the new tariffs on local production. Ensure reduction in feed costs by **meeting production requirements of infrastructure investment in soybean crushing facilities, improved market access, and smallholder support.**

National Key Outputs

- 1. Increase domestic production of soybean to meet increasing capacity of crushing facilities and ensure reduction in feed costs by *further* infrastructure investment in soybean and yellow maize production and processing.**
 - Amendment of soybean-grading regulations, and develop and implement regulations on retention of protected soybean seeds
- 2. Refine and expand smallholder training programmes and supply packages for production and post-harvest practices for soybean and yellow maize, with off-take agreements with feed companies.**
- 3. Develop and implement a national Poultry support programme in partnership with SAPA**
 - R&D: Poultry research programme, identifying more energy-efficient broiler production systems; and to develop higher yielding soybean varieties, through partnerships with private sector seed companies

Problem statement:

- Global red meat consumption has trebled over the past four decades, and increased by about 20% in the last 10 years.
- Similarly in South Africa, red meat consumption has increased by about 20% since the early 1990s, and is projected to increase by a further 20% by 2023.
- South Africa is currently a net importer of meat, with imports of meat and poultry growing from R2.4 billion in 2008 to R4.9 billion in 2012, an increase of 51%. **The South African beef industry cannot supply the local demand for beef, due to a consistent shortfall of about 10% p.a. over the past 10 years.** Furthermore 40% of all SA's livestock, are non-commercial communal animals, mainly used for traditional purposes.
- Current consumption of Soya Bean Oil Cake is estimated to be 1.2 mill tons., of which 600 000 tons is produced locally and the difference imported – 50% of demand imported.
- The demand is projected to increase to 1.8 million, most of which will be supplied locally by 2023 – through the expansion of crushing facilities – IDC investment.

Strategy: Interventions will focus on commercialising the communal livestock systems and improving veldt management practices., and a long term vision is to build South Africa's export capacity through improved governance systems; including livestock improvement schemes; compulsory community vet services; assessment of and improvement of Animal Health strategies; livestock estimates (data collection); traceability system; and abattoir rating scheme.

National Key Outputs

- 1. Animal and Veld Improvement Programme to commercialise communal systems + LandCare Veld Management Programme to improve grazing and veldt management in communal areas**
 - Determination of the livestock census for the categorisation and understanding of South Africa's livestock production systems
- 2. Expand and improve Animal Recording and Performance Testing Programme, to develop and maintain and improving the herd health status and husbandry.**
 - Activate mobile veterinary clinics for remote areas with community services for vets to provide basic animal healthcare services.
- 3. Livestock identification and traceability system (registration of animals)**
 - Review and assessment of Vet and Animal healthcare strategies and programmes.

SECTORAL KAP – WHEAT

Problem statement: Presently about 50% of what is consumed domestically is imported. However the area planted has declined by about 60% to 70%, to some extent in favour of grazing, soya beans and maize. There is potential to return some areas to wheat. The major challenge is unfavourable weather conditions, and **lower profitability of wheat production compared to other crops such as soya beans and maize. How to improve profitability of wheat production must be investigated further.**

Objective: To increase land under production for domestic consumption and reduce the dependence on imported wheat. Rotational cropping - concentrating on Western Cape and Free State, by examining the possibility of augmenting milling capacity in the Western Cape. **The more longer term strategy, would be for exporting of South African wheat for its high quality.** This will be done through a combination of R&D investment in new cultivars, adaptation of climate smart agriculture to address sensitivity of wheat production to weather conditions etc.

SECTORAL KAP – WHEAT

National Key Outputs

- 1. SIP11 - Post harvest handling and processing facilities; and reduce bulk transport costs by progressively increasing use of rail - determine options for expanding wheat milling capacity in the Western Cape**
- 3. R&D: Partner with private sector seed companies in order to develop higher yielding varieties, with lower protein content, and targeting high protein context varieties for export markets.**
 - Improving export market access for the surplus production of South Africa's exceptional high quality wheat
- 2. Develop and deliver standardised and targeted input supply package for smallholder wheat producers through the reprioritisation of Ilima/Letsema programme**
 - Investigate viability of raising tariffs on imported wheat.

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Problem statement:

- The fruit industry represents a 10% contribution to the overall employment in the agricultural sector. The gross value of horticultural products contributed **25.0% to the total gross value of agricultural production**.
- In 2012, horticultural products contributed **25% to the total gross value of agricultural production**, with strong export performance by citrus (R7,9 billion), wine (R6,9 billion), apples, pears and quinces (R5,2 billion) and grapes (R4,6 billion) (DAFF, 2013).
- Most of these exports are from large-scale commercial producers. **More than 50% of all agricultural exports from South Africa are fresh fruit**. The fruit industry exports about 2.7 million tons of fruit annually to more than 87 countries in the world, earning R19.8 billion in foreign currency.
- Annually, **600 000 tons of fruit is supplied to the local market**, traded at wholesalers, formal municipal and metropolitan markets; **1.2 million tons is supplied to processing plants for production of fruit concentrate, fruit juices and canned fruit** while 51 000 tons is processed into dried fruits for both local and export markets.
- The major constraints in the NFPMs are declines in the volumes of fresh produce (fruits and vegetables) traded through these markets owing to deteriorating infrastructure in these markets, lack of re-investment by municipalities into the capital expenditure of the markets, non-compliance to food safety and health standards, and management capacity of NFPMs.

Objective: Expand export market. The objective for this round of APAP is to expand export market, and improve investment in NFPM infrastructure, the promotion of co-operatives and facilitation of formation of farmer associations as well as study groups in the production areas

National Key Outputs

- 1. Trade strategy – aimed at expanding export market**
- 3. Establish a training programme geared at subsistence and smallholder farmers to be implemented via extension services**
 - Production inputs supplies provided through existing grant funds such as Ilima/Letsema i.e. seeds, seedlings and fertilisers etc.
- 2. Develop a comprehensive research programme for horticultural sector i.e. breeding programme, pest and disease programme etc.**



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Problem statement:

- The wine industry in South African is an important export industry and wine exports in particular have skyrocketed since the deregulation of South African markets. SAWIS (2013) reports that the total hectares under wine vineyards increased by 4% between 2002 and 2012, while the total number of litres produced increased by 20%.
- The second challenge could further be related to the growing importance of supermarkets as wine retailers, which has changed the way in which wine is consumed and marketed, turning the industry from premium bottled wine to bulk retail quality wines.

Objective: To expand export market by improving product development and expanding trade agreements.



National Key Outputs

Trade strategy – aimed at expanding export market

- Transformation plan including:
 - CSI plan
 - BEE dashboard
 - Piloting land reform projects
 - Promoting black-owned brands

2. Develop policy framework for learning & development in the wine industry

- Detail analysis and quantification of alcohol illicit trade in the South African market

3. Develop wine social compact and better platform for communication with labour

- Wine industry generic marketing campaign in the South African Market including wine education and responsible alcohol use



Problem statement:

- **Biofuels possibly represent the best all-around opportunity to grow South Africa's field-crop subsectors without creating a price-depressing over-supply.** While the consequences for food security must be monitored, there are large amounts of under-utilised arable land in former homelands that can be brought into production, as well as some land in commercial areas, including under-utilised marginal land suitable for e.g. sorghum, especially if using climate smart agriculture.



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Objective: There are two main types of interventions: **1st relates to a cluster of R&D initiatives to ensure that farmers have access to the best possible varieties for feedstock production.** The second is **to determine how best to develop the smallholder sector to become feedstock suppliers, especially as much of the land that could be made available for biofuels feedstock production is located within the former homelands.**

National Key Outputs

- 1. Partner with private sector seed companies in order to develop higher yielding varieties of targeted feedstock crops**
- 2. Launch intensive research programme to develop conservation agriculture options for key feedstock crops, e.g. grain sorghum**
- 3. Develop a smallholder biofuels feedstock production support strategy, including:**
 - standardised and targeted input supply package for feedstock crops, drawing on Ilima/Letsema programme
 - scheme models for introduction in under-utilised former homeland areas
 - Off-take agreements with private companies (refineries)

Problem statement:

- Private sector lessees of state land favours short-term returns via pulpwood use over longer-term returns from sawlogs, as the latter long rotation period makes it less attractive other than roundwood production. – leading to under-investment in long rotation uses such as timber for sawlogs
- The forestry sector is currently experiencing a myriad of challenges, which impede it from reaching its production and employment potential. These challenges include low afforestation uptake due to cumbersome **water licensing processes** and dominance by a few big, vertically-integrated forestry corporations.

Objective: Availability of fibre is identified as the key constraint. Three principal sources for maintaining and increasing the availability of fibre have been identified as: (1) **increase in the afforested area;** (2) **rehabilitation and improved management of the categories B and C and re-commissioning of state owned forests;** (3) **Small Growers Grant**

NATIONAL OUTPUTS

2. Review of conditions around issuing of Water licenses (regulatory conditions & compliance costs for small growers)

3. Processing: Pole treating, Sawmilling supporting SMMEs through deliberate policies that favour SMMEs e.g. Small Growers Grant

- Non Timber Forest Products (NTFP): Charcoal production; honey production; and pelleting (forestry)

- Fire protection, Pest and diseases.
- Funding and implementation of Forestry R&D Strategy (equitable share of R&D investment by DAFF)

1. Refurbishment of Category B & C plantations, all plantations identified for FSC Certification certified.

- Re-commissioning of the Western Cape and Mpumalanga – replanting to commence in all exited areas.



Problem statement: Fisheries is facing depleted stocks of marine and coastal wild capture fisheries, but shows enormous potential in terms of aquaculture. In the past, Small-Scale Fishing was not recognised in the MLRA that regulates access to, and the allocation of commercial fishing rights negatively impacted on the traditional fishing of communities and their lifestyles, as a large percentage of these fishing communities did not receive any allocations.

Objective: Providing the legislative framework for developing small-scale fishers and fishing communities within strategic fisheries zones, supporting commercial fisheries through improved R&D infrastructure and M&E systems for monitoring stocks; **to establish the Aquaculture Sector through institutionalisation of support, key services, and regulatory framework.**



NATIONAL OUTPUTS

- Implementation of 23 aquaculture catalyst projects:
- Establishment of an Interdepartmental Authorisations Committee:
- Establishment of an Aquaculture development fund:
- Develop Capacity at DAFF and the Delivery Unit:
- Government Preferential Procurement:



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