



*Agriculture
Forestry
and Fisheries*

**AGRICULTURE, FORESTRY
AND FISHERIES**

AGRICULTURE, FORESTRY AND FISHERIES

The agriculture, forestry and fisheries sectors are crucial to South Africa's socio-economic development. The key priorities of the Department of Agriculture, Forestry and Fisheries are therefore aligned to alleviating poverty, creating employment and improving food security.

Economic contribution

While the primary agricultural sector contributes about 3% to the country's gross domestic product (GDP), it represents about 7% of formal employment. If the entire value chain of agriculture is taken into account, its contribution to GDP reaches about 12%.

Agricultural activities range from intensive crop production and mixed farming to cattle-ranching and sheep-farming. About 12% of South Africa's surface area can be used for crop production. High-potential arable land comprises only 22% of total arable land. Some 1,3 million hectares (ha) are under irrigation.

As a natural resource, the fisheries sector is also recognised as a potential area for economic growth. The mandate for fisheries management includes fresh water and inland fisheries, as well as aquaculture.

Broadening the scope of aquaculture will provide the opportunity to increase the production of fish and other aquatic food species, thereby decreasing the pressure on natural fish resources.

Through the National Aquaculture Strategic Framework, the department strives to ensure effective stakeholder engagement and management, as well as to advance the transformation agenda in the sector.

The gross value of agricultural production for 2011 was estimated at R147 283 million, compared to R132 136 million the previous year – representing an increase of 11,5%. The gross income of producers by 31 December 2011 amounted to R144 603 million, compared with R129 741 million in 2010 – an increase of 11,5%.

Gross income from field crops increased by 29,8%, to R35 798 million in 2011. Nett farm income amounted to

Did you know?

- In 1992, South Africa exported 21 million litres (Ml) of wine. By 2001, the country exported 217 Ml and by August 2012, 377 Ml was exported.
- Local wine sales are growing with 4% year-on-year and wine exports by 7,8%.
- There are about 3 600 wine farmers in the Western Cape and vineyards of more than 100 000 ha.
- South Africa is the eighth largest wine producer and its share in the international wine market is about 5%.
- Almost 22% of the wine exports are to the United Kingdom.
- Wine tourism generates almost R5 billion a year in the Western Cape and creates thousands of jobs.

R39 930 million by 31 December 2011, which is 14,6% higher than in the previous 12 months.

Field crops and horticulture

The largest area of farmland planted with field crops is maize, followed by wheat and, to a lesser extent, sugar cane and sunflower seed. The grain industry is one of the largest in South Africa and is a very strategic one.

- South Africa is the main maize producer in the SADC region. Maize is produced mainly in North West, the Free State and Mpumalanga. Some 10,8 Mt of maize were commercially produced in 2011/12 on 2,7 million ha of land.
- Wheat is produced mainly in the winter rainfall areas of the Western Cape and the eastern parts of the Free State. In 2011, 2,0 Mt were produced on 604 700 ha of land.
- Malting barley is produced mainly on the southern coastal plains of the Western Cape. The area of barley planted totalled 80 150 ha in 2011, and production totalled 312 000 t.
- Sorghum is cultivated mostly in the drier parts of the summer rainfall areas such as Mpumalanga, the Free State, Limpopo and North West.
- The sugar industry combines sugar-cane cultivation and industrial factory production of raw and refined sugar, syrups and specialised sugars, as well as a range of

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by-products. The cane-growing sector has about 29 130 registered sugar-cane growers farming predominantly in KwaZulu-Natal, with a substantial investment in Mpumalanga and some farming operations in the Eastern Cape. Sugar is manufactured by six milling companies with 14 sugar mills operating in these cane-growing regions. The industry produces an estimated average of 2,2 Mt of sugar per season of which about 80% of sugar is marketed in the Southern African Customs Union. The remainder is exported to markets in Africa, Asia and the Middle East.

- South Africa's indigenous flowers such as gladioli, nerines, freesias and gerberas have undergone many years of extensive research in Europe, and have become major crops worldwide. The total floriculture industry employs some 17 500 people.

Other crops

Other crops grown in South Africa include among others:

- Deciduous fruit is grown mainly in the Western Cape and in the Langkloof Valley of the Eastern Cape. Smaller production areas are found along the Orange River and in the Free State, Mpumalanga and Gauteng. In 2011, South Africa produced 1 644 825 t of deciduous fruit.
- Pineapples are grown mainly in the Eastern Cape and in northern KwaZulu-Natal.
- Other subtropical crops such as avocados, mangoes, bananas, litchis, guavas, papayas, granadillas and macadamia and pecan nuts are produced mainly in Mpumalanga and Limpopo, and in the subtropical coastal areas of KwaZulu-Natal and the Eastern Cape.
- South Africa is the eighth largest wine producer in the world. The 2011 crop – including juice and concentrate for non-alcoholic purposes, wine for brandy and distilling wine – amounted to 1 013,5 Mℓ.

Organic agriculture

Organic farming avoids the use of synthetic pesticides, herbicides and chemical fertilisers by using a range of

techniques that help sustain ecosystems and reduce pollution.

There are an estimated 250 farms on 45 000 ha of certified land in South Africa. Organic crops include various cereals, vegetables, roots and tubers, herbs and spices, fruit, nuts and rooibos tea.

As a follow-up to the commitments made in 2011 at the 17th Conference of the Parties to the United Nations (UN) Framework Convention on Climate Change (better known as COP17), the Department of Agriculture, Forestry and Fisheries will promote climate-smart agriculture such as the adoption of sustainable production systems, namely organic farming, agro-ecology and conservation agriculture.

Regarding conservation agriculture, pilot projects have been implemented in several provinces. This was done in collaboration with the Agricultural Research Council and the UN Food and Agriculture Organisation.

Livestock

Animal production contributes approximately 41% to the country's agricultural GDP. About 500 000 people are employed by the industry.

Milk production in South Africa contributes approximately 0,5% to the world's milk production. South Africa has four major dairy breeds, namely Holstein, Jersey, Guernsey and Ayrshire.

Mpumalanga commands the greatest share of beef production in South Africa, accounting for 23% in 2009, followed with the Free State and Gauteng, taking up 20% and 13% respectively. Commercial farmers own 60% of the 14,1 million cattle available in South Africa. There are 27 popular beef breeds in South Africa including the Brahman, indigenous Afrikaner

Working through the World Economic Forum's New Vision for Agriculture initiative, more than 250 organisations are collaborating to improve sustainable food production and opportunities for farmers in 11 countries in Africa, Asia and Latin America. Together, these activities will have a direct impact on more than 12 million smallholder farmers in the next three to five years.

Pocket Guide to South Africa 2012/13
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and Nguni, Tuli, Boron, Bonsmara, Drakensberger, Simbra, Beefmaster, Angus and Braford.

Support to smallholder farmers

Smallholder farming has become central to job creation and economic growth in South Africa. Smallholder farmers are therefore encouraged to produce and drive economies in their respective communities. To this end, the Department of Agriculture, Forestry and Fisheries increased its support to new and existing smallholder farmers, working in close collaboration with the provinces to achieve its targets.

A Smallholder Development Working Group was established to strengthen collaboration between the parties that deal with the smallholder support mandate.

The department encourages household food production through backyard gardens and programmes such as the Household Food Security and Ilima-Letsema Campaign, whose main objective is to motivate communities to plough, plant and produce their own food.

The Ilima-Letsema Programme focuses on increasing food production and rehabilitating irrigation schemes and other value-adding projects. In 2011/12, 14 029 jobs were created through the programme.

Climate change response

The agriculture sector in South Africa faces considerable impact from climate change, which affects the livelihoods of the majority of people, especially those that are vulnerable to food insecurity.

South Africa responds to international obligations regarding climate mainly through the Department of Environmental Affairs, but the Department of Agriculture, Forestry and Fisheries, as well as other departments such as the departments of mineral resources, energy, science and technology, and water affairs are also involved.

The Climate Change Programme implemented by the Department of Agriculture Forestry and Fisheries include programmes on raising awareness, developing policy, sector

mitigation and adaptation plans, conducting vulnerability assessments countrywide, and identifying and coordinating climate-related research projects.

South Africa is a full member of the Global Research Alliance, which among other objectives, aim to enhance collaborative research into agricultural emission reductions and increase support and resourcing for agricultural emission research.

The research report on the *Agricultural Greenhouse Gas Inventory* and capacity-building for the sector was published in 2011. The results of the project will inform the development of the mitigation strategy, which is expected to assist in achieving food security. *The Atlas of Climate Change and The South African Agricultural Sector: A 2010 Perspective*, aimed at investigating the first- to fourth-order impacts of climate change on agriculture, were also completed and published.

Forestry

The Department of Agriculture, Forestry and Fisheries is the custodian of South Africa's forest resources, which cover over 40 million ha of the country's land surface area. An amount of R1,2 billion from the department's budget has been allocated to forestry and natural resources management.

The forestry sector employs around 201 025 workers and provides about 77 000 direct jobs and 30 000 indirect jobs. Forestry provides livelihood support to 2,3 million people of the country's rural population.

The pulp and paper industry provides approximately 13 200 direct and 11 000 indirect employment opportunities. Some 20 000 workers are employed in sawmilling, 6 000 in the timber board and 2 200 in the mining timber industries, while a further 11 000 workers are employed in miscellaneous jobs in forestry.

In terms of land use, the area under forest is about 1,28 million ha or approximately 1,0% of the total South African land area of 122,3 million ha. The forestry sector (forestry and forest products) contributes about 1,2% to the GDP.

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In terms of regional GDP, forestry in KwaZulu-Natal contributes 4,5%; in Mpumalanga 4,7%; in the Eastern Cape 0,9%; and about 0,5% in Limpopo.

Tonnage sales for 2011, were 1,1% or 176 000 tons less than the budget of 15,5 Mt.

The Department of Agriculture, Forestry and Fisheries contribute to eradicating poverty through the Forestry Livelihoods Programme. Firewood, construction poles, medicinal plants and edible fruits are all critical to the livelihoods of the rural poor.

The department develops human resources through forestry-sector skills-development initiatives and promotes employment through commercial forestry activities such as forestation and downstream activities.

The department pursues the afforestation target of 10 000 ha of nett new afforestation a year. Afforestation is taking place in rural areas where there are few other viable opportunities for job creation and economic activity.

The development of these additional raw material resources will attract greater processing capacity in the form of sawmills, board mills, chipping plants and treatment plants, which will lead to broad economic growth. An additional R500 million a year could be generated from such plantations.

The forestry programme also includes greening and tree-planting projects. The programme prioritises work on fire-fighting programmes such as the Working on Fire Programme and encourages the establishment of fire-protection associations.

The integration of forestry programmes into provincial and municipal development plans will assist the Plant a Million Trees Campaign.

Indigenous forests

Only about 0,5% of South Africa's total land area is covered by natural forests. About half of the more than 1 700 indigenous tree and shrub species, representing some 530 000 ha of dense growth found in South Africa, grow along the south and east coasts and on the southern and south-eastern slopes of

The Champion Tree Project identifies and protects trees that are of national importance and worthy of special protection owing to their remarkable size, age, aesthetic, cultural, historic or tourism value. The first individual tree to be declared as protected under the National Forests Act, 1998 in 2003, was a historic English oak tree, the only remnant of the old Sophiatown that was razed by the previous government when it resettled that community in the 1950s.

Historic trees include a poplar tree, which served as a landmark for refugees during the apartheid regime who found a safe haven in the Johannesburg house of Ruth Fischer (daughter of Bram Fischer who was a founder member of the South African Communist Party).

inland mountains. The other half is spread over the interior plateaux in isolated valleys and ravines.

A number of these natural forest regions, such as the Tsitsikamma National Park, are important tourist attractions. Almost half of all natural forests in South Africa are found on private property or land under communal tenure.

The large Afro-temperate forests of the southern Cape, although distributed close to the coast, are aligned with the inland forest types of the Eastern Cape, KwaZulu-Natal, Mpumalanga and Limpopo.

The seven-week fern (*Rumohra adiantiformis*), harvested in the Knysna and Tsitsikamma forests, is a valuable product of indigenous forests. The South African market for this fern is considerable and reaches its peak in September, when sales have exceeded 420 000 bunches.

Fisheries

The Department of Agriculture, Forestry and Fisheries manages the development and sustainable use of marine and coastal resources; maximising the economic potential of the fisheries sector; and protecting the integrity and quality of the country's marine and coastal ecosystems. The South African shores are particularly rich in biodiversity, with some 10 000 species of marine plants and animals having been recorded.

The productive waters of the west coast support a variety of commercially exploited marine life, including hake, anchovy,

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sardine, horse mackerel, tuna, snoek, rock lobster and abalone.

On the east coast, squid, linefish and a wide range of intertidal resources provide an important source of food and livelihood for coastal communities. Marine life that is not harvested, such as whales, dolphins and seabirds, is increasingly recognised as a valuable resource for nature-based tourism.

The main challenge in fisheries is to create a balance between maximising the social and economic potential of the fisheries industry while protecting the integrity and quality of the country's marine and coastal ecosystems and addressing transformation in the sector.

In line with international trends, the department recognises fisheries as an economic activity rather than a purely environmental or biodiversity matter. Government has expanded the mandate for fisheries management through the inclusion of fresh water and inland fisheries, as well as aquaculture, to the department's existing responsibilities.

The department will gradually establish offices of the fisheries branch in other coastal and inland provinces. These are economic decisions, which contribute to employment creation and poverty alleviation.

In 2012, the Department of Agriculture, Forestry and Fisheries hosted the sixth session of the UN Food and Agriculture Organisation Committee on Fisheries Sub-Committee on Aquaculture.

In support of the adoption of sustainable aquaculture that benefits the poor, the department committed to investing in infrastructure and skills transfer to the amount of R150 million over the 2010/13 period.

The Small-Scale Fisheries Policy, which is being finalised, seeks to address the imbalances of the past and ensure that small-scale fishers are accommodated and properly managed. For the first time, fishing rights will be allocated on a group basis, rather than on an individual basis.