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# An Evaluation of the Market Access Programme

Final Report  
Goss Gilroy Inc.

June 2014

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# AN EVALUATION OF THE MARKET ACCESS PROGRAMME

## *Final Report*

1/3/25 format

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## ACRONYMS

AFASA	African Farmers Association of South Africa
AFMA	African Farm Management Association
Agri-BEE	Agricultural Black Economic Empowerment
ARC	Agricultural Research Council
CASIDRA	Cape Agency for Sustainable Integrated Development in Rural Areas
CPAC	Commodity Project Allocation Committee
CASP	Comprehensive Agricultural Support Programme
COSATU	Congress of South African Trade Unions
CRDP	Comprehensive Rural development Programme
CTA	Technical Centre for Agricultural and Rural Cooperation
DAFF	Department of Agriculture, Forestry and Fisheries
DBSA	Development Bank of South Africa
DFID	Department of International Development
DRDLR	Department of Rural Development and Land Reform
DTI	Department of Trade and Industry
EC	European Commission
EDD	Economic Development Department
FAO	Food and Agriculture Organisation
FS&D	Farmer Support and Development
FPEF	Fresh Produce Exporters' Forum
GGI	Goss Gilroy Incorporated
GVC	Global Value Chains
HACCP	Hazard Analysis and Critical Control Point
HORTGRO	Horticultural Knowledge Group
IFAD	International Fund for Agricultural Development
IGDP	Integrated Growth and Development Plan
ITC	International Trade Centre
IMS	Integrated Marketing Strategy
KPP	Key Policy Priorities
LARP	Land Agrarian Reform Project
LED	Local Economic Development
LRAD	Land Reform for Agricultural Development

MTSF	Medium Term Strategic Framework
MRL	Minimum Residue Limit
MAP	Market Access Programme
MM4P	Making Markets Work for the Poor
MRP	Market Readiness Programme
NAMC	National Agricultural Marketing Council
NEPAD	New Partnership for Africa's Development
NERPO	National Emergent Red Meat Producers Organisation
NDP	National Development Plan
NPC	National Planning Commission
OABS	Optimal Agricultural Business Systems
ODI	Overseas Development Institute
OECD	Organisation for Economic Co-operation and Development
PLAAS	Institute for Policy, Land and Agrarian Studies
PLAS	Proactive Land Acquisition Strategy
PPECB	Perishable Products Export Control Board
PSO	Provincial Strategic Objective
RADP	Recapitalisation and Development Programme
RSA	Republic of South Africa
SCLP	Supply Chain Logistics Programme
SLAG	Settlement and Land Acquisition Grant
SPSS	Strategic Plan for Smallholder Support
SWOT	Strengths, Weaknesses, Opportunities, Threats
TOR	Terms of Reference
USAID	United States Agency for International Development
VINPRO	Cape Wine Producers
WCDOA	Western Cape Department of Agriculture

## MAP ONE PAGE EVALUATION SUMMARY

The Market Access Programme (MAP) was initiated in 2010 and extended annually into 2011 and 2012. The programme set out to strengthen the economic sustainability of existing and new previously disadvantaged farmers by addressing a range of upstream and downstream challenges across the value chain.

POSITIVE RESULTS	CHALLENGES
SWOT and gap analysis conducted on individual farms to profile the business, identify opportunities	Inadequate farmer profiling meant that many of the farmers selected were not market ready
Strategic business plans prepared which enabled some of the farmer to raise finance	Intensive work, training and capacity building required to make more producers more ready to access markets
The technical advice offered to farmers was often valuable	SA Gap and Global Gap accreditation costs are high and have unbudgeted infrastructural implications
Technical advice in the fruit sector helped to deliver better quality produce	Institutional problems and poor actor co-ordination slowed down efficient progress of MAP
	The role of extension officers and their contribution to MAP was not sufficiently clarified during programme design and implementation

RECOMMENDATIONS
Undertake more comprehensive profiling of the potential programme participants and the viability of their enterprise potential to aid programme selection
Address and clarify tenure and land rights management issues on land reform projects where there are group rights
Distinguish between market readiness and market access and develop associated general and sectoral criteria
Conduct more in-depth research on the actual marketing arrangements of small-scale producers and the functioning and cost structure of informal markets which many supply
Redesign MAP to include a market readiness programme (MRP) and a market access programme (MAP) with the full involvement and support of extension personnel augmented by private sector commodity specialists from the outset
Specify roles, relationships and mutual obligations of the service provider(s) and programme participants up front
Ensure a closer alignment between MRP and MAP with CASP and the Recapitalisation and Development Programme
Create a distinctive identity for MRP and MAP to ensure broader visibility and recognition and ensure alignment with other similar initiatives



## EXECUTIVE SUMMARY

The Market Access Programme (MAP) was initiated in 2010 and extended annually into 2011 and 2012. The programme set out to strengthen the economic sustainability of existing and new previously disadvantaged farmers by addressing a range of upstream and downstream challenges across the value chain. The Programme was set out to:

- Improve producer participation in mainstream value chains through training, capacity building and provision of technical advice;
- Secure producer compliance with public and private standards locally and abroad;
- Leverage support for private sector driven market development activities;
- Ensure that relevant market intelligence is available and accessible to all current and potential role players; and
- Enhance access to markets by farmers.

## THE EVALUATION

This evaluation addressed five key questions:

- To what extent and how have the market linkages introduced through MAP been exploited and sustained?
- How and to what extent have training and capacity building offered by MAP helped farmers and agribusinesses in identifying new market opportunities and/or sustaining existing ones?
- How and to what extent has the technical advice offered to farmers influenced them to deliver better quality produce and thereby gain access to high value markets?
- How and to what extent have farmer compliance with standards and regulations influenced market access?
- How should the programme be modified or redesigned to optimize success, minimize failures, efficiently increase reach and scale of implementation, take advantage of unexploited opportunities and pursue highest-yield programme options?

The evaluation has involved in depth interviews with participating farmers, officials from WCDOA, service provider representatives and market agents.

## KEY FINDINGS

The evaluation reveals that many of the farmers selected to participate in the programme were not market ready. Informants report that intensive work was required to bring these producers closer to market readiness. This required an investment of time and resources which exceeded budget allocations which allowed for one farm visit per quarter in the first year. From year two of the programme the budget was increased to allow for six farm visits per year.

The programme succeeded in conducting SWOT and gap analysis on individual farms to profile the business and identify opportunities. It also prepared strategic business plans for participating farmers which enabled some of them to raise finance. It provided basic training and domestic market exposure visits for most programme participants as well as international exposure tours for those in a position to access export markets.

The MAP initiative faced a number of challenges which undermined its effectiveness. These stemmed from inadequate farmer selection criteria and a focus on market access without first ensuring that participants were market ready. This resulted in instances where market linkages were negotiated but producers were not yet in a position to utilise them. Many preferred to side sell, supplying hawkers and informal markets which offered cash at the farm gate and lower transaction costs.

The evaluation highlights a number of institutional problems relating to the coordination of different actors and initiatives. It emerged that similar initiatives were being run by the National Agricultural Marketing Council (NAMC) in parallel with MAP which required alignment. This led to meetings between the NAMC and the WCDOA where it was agreed that in future support to the fruit farmers would be provided by NAMC while the MAP service provider would focus its work on livestock and vegetable producers.

The service provider contracted to drive the programme was initially appointed on a one-year contract which was subsequently renewed. A lack of certainty concerning contractual arrangements and annual renewal impacted on the smooth rollout of MAP.

The relationship between the service provider and extension officers employed in the Farmer Support and Development (FS&D) programme of WCDOA was not adequately specified. This was reflected in the fact that support to MAP activities did not form part of their performance statements.

Training and capacity building offered under the programme was forced to focus more on factors which would contribute to making producers more ready to access markets. While the international exposure visits were interesting it is debatable whether they provided good value for money in terms of the market opportunities created and sustained through them.

Producers report that the technical advice offered to farmers was often valuable and did play a role in the fruit sector particularly to deliver better quality produce.

The programme underestimated the costs of securing SA Gap and Global Gap accreditation which often required infrastructural improvements or development which farmers could not afford. Many of the producers who have achieved compliance with standards and regulations did so before entering the programme or in association with strategic partners. MAP needs to recognize that achieving compliance is challenging for many producers and makes enormous demands on management capacity and systems. Likewise certification is not a once off process and producers need to understand that they face ongoing audits to ensure continued compliance. This creates a real risk that compliance once achieved at significant cost may then lapse.

Overall MAP did not succeed in developing a distinctive programme identity. Many of its activities overlapped with those provided by other actors which have meant that several programme participants have found it difficult to differentiate and evaluate MAP activities, their effectiveness and impact.

## RECOMMENDATIONS

The evaluation recommends that if MAP is to be sustained or extended the next iteration of the programme needs to be preceded more in-depth research on the actual marketing arrangements of small-scale producers and the functioning and cost structure of informal markets which many supply. Several producers report that informal markets are more profitable for them as they do not carry onerous compliance requirements.

MAP should proceed on the basis of a more comprehensive profiling of the potential programme participants and the viability of their enterprise potential. From a policy perspective this needs to review the issue of producer dependence on CASP funding to ensure enterprise survival.

Several of the properties identified for inclusion in MAP were legacy land reform projects with multiple beneficiaries and long histories of unresolved institutional and benefit sharing problems. If these properties are to be involved in future programmes there will need to be specialist institutional development and legal support provided to address and resolve these issues as there are examples where they have undermined initiatives developed through MAP.

The evaluation recommends the design and implementation of a comprehensive market readiness programme (MRP) with the full involvement and support of extension personnel augmented by private sector commodity specialists. This needs to be based on more rigorous farmer selection criteria. Overall the programme needs to clearly distinguish between activities associated with market readiness and those required for actual access of markets which is the MAP mandate. The redesigned programme requires improved branding, coordination and alignment with full participation of extension agents and clarity concerning their roles.

Roles, relationships and mutual obligations of the service provider and programme participants require specification. The service provider did attempt to introduce memorandums of agreement between itself and the programme participants to set out their mutual responsibilities in the delivery of the programme. This approach should be encouraged and consolidated if the programme is to be extended in future. If an MRP/MAP initiative is to be extended it will require a longer operational timeframe but with independent monitoring and evaluation of programme performance built in.

Any future programme activities will require much closer alignment with CASP and the Recapitalisation and Development Programme operated by the Department of Rural Development and Land Reform as in many instances participating farmers require investment and infrastructure to position them to meet compliance requirements.

The roll-out of the next phase MAP should explore and create for itself a distinctive identity of its own and position itself for broader visibility and recognition.

## ABOUT THIS REPORT

This final report presents findings from the evaluation of the Market Access Programme (MAP) implemented by the Western Cape Department of Agriculture (WCDOA) with the support of selected service providers in 1/3/25 format. A more in depth report with appendices is available for programme management staff.

**Section 1** situates the programme to secure improved market access for small producers against the backdrop of the ongoing restructuring of South African agriculture and its repositioning within a rapidly changing and highly competitive globalised agricultural production. It provides background on the design of MAP, its broad objectives and clarifies the purpose and scope of this evaluation.

**Section 2** reviews the methodological approach adopted to undertake different aspects of the evaluation and identifies key challenges encountered.

**Section 3** of the report provides background to the design of the MAP programme, its anticipated deliverables, outcomes, implementation approach, highlighting overlaps with the Supply Chain and Logistical Programme (SCLP) run by the National Agricultural Marketing Council (NAMC)

**Sections 4 – 6** present findings derived from interviews and focus groups. They reflect on the relative successes and challenges facing producers served by the programme. Together these enable a review of MAP's effectiveness in establishing and sustaining market linkages, providing training and capacity building, technical advice in order to produce higher quality products and improved compliance with standards and regulations mediating access to markets. This allows for reflection on programme design and its efficiency, relevance and sustainability.

**Section 7** presents key conclusions and recommendations from the evaluation review.

There are various companion documents which have been prepared to augment this 1/3/25 summary report including:

- A brief review of the literature
- The views of selected market agents
- Tables and charts providing a more detailed breakdown of programme participant responses.

## 1 MAP IN CONTEXT

The implementation of the Market Access Programme (MAP) takes place against the backdrop of the South African land reform programme which faces many challenges. The majority of black smallholders and land reform beneficiaries produce for local informal markets while other small capitalist farmers are struggling to enter a fiercely competitive and increasingly globalised agricultural sector.

The agricultural sector as a whole has been profoundly impacted by a combination of deregulation and agro-commodity trade liberalisation policies which have been coupled with private re-regulation driven by global supermarket chains to protect Northern consumers ([Du Toit and Ewert, 2002](#)). Deregulation and land reform which commenced in South Africa in the mid 1990's have not significantly improved the position of small and emerging farmers in the Western Cape with researchers arguing on that small farmers have not benefitted from either deregulation or land reform. ([van Zyl et al., 2001](#), [Greenberg, 2010](#), [Aliber, 2013](#)). Through the removal of subsidies and control boards many small farmers lost guaranteed buyers and were pitted against larger farmers who were more capitalised and had economies of scale on their side (OECD, 2008). While deregulation led to a boom in marketers and exporters for both fruit and wine serving export-oriented production regions in the Western Cape and an increase in wine and horticultural exports (DBSA, 2009), re-regulation within global agro food chains has introduced high compliance standards which present significant barriers to entry for small producers. This has contributed to falling permanent employment and the casualisation and externalisation of labour on commercial fruit and wine farms ([Barrientos and Kritzinger, 2004](#), [Theron and Bamu, 2009](#)).

This context presented many challenges for the design and implementation of MAP which quickly discovered that the majority of farmers selected could not be expected to access markets as they were not market ready – frequently having insufficient product and lacking commercial and financial management systems to meet the stringent compliance requirements associated with entry into domestic and international markets.

South African agriculture is highly stratified. The WCDOA differentiates between three categories of farmers.

**TABLE 1: CATEGORIES OF SMALLHOLDERS USED BY WCDOA**

Category	Subsistence Farmers		Smallholder Farmers		Commercial Farmers		
Sub-categories	Urban / Per- urban	Survival farmers	Lifestyle / small smallholder farmers	Smallholder farmers with commercial potential	Small	Medium	Large
	Household & Community Projects						

Overall there is consensus that data on subsistence and smallholder farmers is lacking which is problematic in establishing baselines to evaluate the impact of programmes which seek to improve production output and market access of smallholder producers. Despite implementation of several policies and programmes<sup>1</sup> many black smallholders, small and medium commercial farmers still experience a wide range of problems. These

<sup>1</sup> These include Market Deregulation, the Land Reform Programme, the Comprehensive Rural Development Programme (CRDP), Broadening Access to Agriculture Thrust (BATAT), Comprehensive Agricultural Support Programme (CASP), Mafisa, Ilima/Letsema, DAFF's Integrated Growth and Development Plan (IGDP) and the Strategic Plan for Smallholder Support (SPSS) and the Integrated marketing Strategy for Agriculture, Forestry and Fisheries Products - 2012 - 2030

include limited access to land water, finance and specialised management support, dependency on continued capital injections from the state and barriers to market entry partly as a consequence of poor quality of produce and low volumes. Other constraints identified which restrict entry into value chains are lack of reliable, relevant and timely market information, inadequate market infrastructure (e.g. storage and packaging facilities) and inadequate transport facilities. Many smallholder producers rely on direct sales from the farm gate and supply local informal markets which remain poorly researched. However available research indicates that these markets are shrinking as a result of the penetration of large supermarket chains into the agri-food sector ([Crush and Frayne, 2011](#)).

## 1.1 PROGRAMME ORIGINS AND SETTING

Provincial Strategic Objective No 11 of the Western Cape Government aims at “increasing opportunities for growth and development in rural areas”. The WCDOA identified market access as one of the key priorities to support smallholder farmers. There have been two relatively recent attempts to enumerate ‘emerging farmers’ in the Western Cape ([Geostratics, 2010](#), [WCDOA, 2010](#)). However there is no single source of data on ‘emerging’ ‘black’ ‘smallholder producers’ or commonly agreed definitions to guide data collection.

The agricultural sector is one of the primary pillars of the Western Cape economy, highly developed and accounting for approximately 21% of the value of South Africa’s agricultural production and 45% of the country’s agricultural exports.

The Western Cape has a specific physical geography with winter rainfall in the Winelands area and year round rainfall in the Southern Cape which differentiates itself from the rest of South Africa, creating high productivity for certain crops. There are 11 commodities produced including fruit, poultry and eggs, winter grains such as barley, wheat and hops, viticulture and vegetables. These commodities make up between 55% and 60% of South Africa’s agricultural exports, which are valued at more than R7 billion per year. The Western Cape also contributes approximately 20% towards South Africa’s total agricultural production (Elsenburg, 2013).

The Western Cape exemplifies the highly stratified nature of the South African agriculture sector, where there is intensive consolidation of ownership taking place as large agribusinesses producing for export increasingly absorb family farms which, together with a minority of smallholder farmers struggle to compete to produce for both local and international markets ([Murray, 2010](#)). Emerging smallholder farmers who are not part of equity schemes, or resource rich have a variety of barriers to entry to contend with in this highly capital and resource intensive sector.

Black smallholder and commercial farmers and state and non-state support agencies have to navigate complex institutional, ecological and economic settings including:

- The government policy context and the interrelationships between various spheres of government, programmes and agencies charged with smallholder support;
- The ecological and farming systems diversity in terms of biodiversity, soils, water and climatic factors which vary widely across those areas which been included in the Market Access Programme;
- The upstream and downstream value chain context and the extent to which this is saturated by big actors and barriers to entry which face small farmers seeking to enter into different market sectors;
- The relative market conditions for the different crops (and any processed products emerging from them); how these change, locally, nationally and internationally and how farmers, government and other actors can intervene in these to pursue opportunities; and

- The social and economic context influencing relationships between white commercial farmers, marketers, processors and black smallholders and commercial farmers which includes the impact and opportunities of the push towards Agri-BEE.

Overall land and agricultural policy has been critiqued for its lack of clarity and the plethora of poorly articulated policies, strategies which emanate from different spheres of government. This institutional context is often characterised by unclear relationships and poor co-ordination between actors in different spheres of government responsible for land reform, rural development and smallholder support.

## 1.2 MAP OBJECTIVES

MAP aims to strengthen the economic sustainability of existing and new previously disadvantaged farmers by addressing the upstream and downstream challenges across the value chain. The Programme was implemented between 2010 - 2012. In addition to strengthening the capacity of the department, the Programme goals were expected to be achieved through:

- Improved participation in mainstream value chains;
- Compliance with public and private standards locally and abroad;
- Support private sector driven market development activities;
- Ensuring that relevant market intelligence is available and accessible to all current and potential role players; and
- Enhanced access to markets by farmers.

## 1.3 MAP IMPLEMENTATION

During the three years period of implementation various activities have been pursued under this programme which include:

- Training in business planning and practice;
- Providing technical advice and training to improve agricultural practices in keeping with farmers' specific needs;
- Providing specific support for overcoming obstacles in gaining access to markets; including meeting certification and compliance requirements; and
- Capacity building trips locally and internationally to expose farmers to prospects of the value chain and related linkages.

Approximately 45 farmers and agribusinesses were targeted for participation in the Programme. The farmers are located across the six districts of the Western Cape; however they are concentrated in the City of Cape Town, Stellenbosch, Witzenberg, Theewaterskloof, Swartland and Beaufort West local municipalities. In order to implement MAP, the WCDOA appointed CASIDRA who adjudicated a competitive tender which awarded the programme implementation to the agricultural consulting firm OABS Development (Pty) Ltd. OABS were initially appointed for the period of a year but their contract was extended over three years. WCDOA, CASIDRA and OABS have worked with various stakeholders within the agricultural and skills development sectors to deliver the programme. A total of 34 producers were interviewed who had participated in the MAP initiative.

## 1.4 MAP EVALUATION PURPOSE AND SCOPE

The purpose of this external evaluation is to assess the results of the first three years of MAP implementation and to utilise the findings to optimise the design of the Programme to enhance its future effectiveness.

The key objectives of the evaluation are to:

- Describe and quantify the key intended and unintended outcomes of the Programme (impact evaluation);
- Document and analyse the key interventions and their contributions to the outcomes of the Programme, taking into account the different points of entry into the Programme and different levels of exposure to the Programme, assessing whether the design of the Programme is fit for the purposes it aims to serve (design evaluation); and
- Develop informed perspectives on future directions for the Market Access Programme in keeping with the findings of the evaluation and the current policy and market environments.

The scope of this evaluation was defined by the parameters set out in the TOR which included:

- The entire lifespan of the Market Access Programme from 2010 to the present;
- The 45 farmers/agribusinesses engaged in the Programme;
- All six geographic localities;
- Implementer perspectives;
- Market perspectives; and
- WCDOA perspectives.

## 2 METHODOLOGY

### 2.1 APPROACH

The approach and methodology has been focused around five key evaluation questions:

- To what extent and how have the market linkages introduced through the market access programme been exploited and sustained?
- How and to what extent have training and capacity building offered by the Market Access Programme helped farmers and agribusinesses in identifying new market opportunities and/or sustaining existing ones?
- How and to what extent has the technical advice offered to farmers influenced them to deliver better quality produce and thereby gain access to high value markets?
- How and to what extent have compliance with standards and regulations influenced market access?
- How should the programme be modified or redesigned to optimize success, minimize failures, efficiently increase reach and scale of implementation, take advantage of unexploited opportunities and pursue highest-yield programme options?

### 2.2 METHODS

The evaluation team set out to use a mix of qualitative and quantitative data collection methods and analytical techniques to address the evaluation questions. Overall there is a limited availability of reliable quantitative data related to the MAP programme which placed the emphasis on a literature review, key informant and producer interviews augmented by focus group discussions, case studies and a review of primary documents and reports which together have helped identify the unintended results / impacts of the programme.

#### 2.2.1 DOCUMENT AND LITERATURE REVIEW

The evaluation team reviewed the literature relating to the Market Access Programme to locate it within the context of the National and Western Cape Government Policy. This is available as a companion document.



## 2.2.2 INTERVIEWS

Interview guides were prepared for different informant groups. Key informants interviewed included:

- Members of the Market Access Programme Steering Committee;
- Western Cape Department of Agriculture officials with involvement in the programme; and
- Representatives of the Service Providers responsible for programme implementation.

Electronic surveys forms were sent to a range of institutions and market agencies associated with MAP. However despite persistent follow ups very few returns were received. In some instances there has been a turnover of personnel in these agencies and new staff professed to know nothing about their company's involvement in the programme. This was indicative that some market access agreements negotiated by the service provider had either never gained traction or had subsequently lapsed.

## 2.2.3 FARM SURVEY

Our original target was to survey a total of 45 producers who were the target of the intervention. However after some discussion with WCDOA to obtain the identity and contact details of MAP programme participants we were provided with a final list with 39 names. However five producers on this list proved to be untraceable making a total of 34 producers interviewed. The interviews highlight low levels of programme uptake by producers in the vegetable and livestock sectors.

## 2.2.4 FOCUS GROUPS

Focus group discussions were originally conceptualised as helping to obtain, general and additional information, views, opinions and details from a group of selected people who represent different perspectives. However individual interviews made it clear that there would be little appetite for participation in follow-up focus group discussions. Many of those producers who were not market ready saw little to be gained from further discussion. We succeeded in holding one focus group with fruit producers in Ceres where producers had made some progress in securing access to markets and there were issues to further discuss.

## 2.3 DATA ANALYSIS

A series of semi structured interview guides and research instruments were developed for each of the interview clusters – officials, institutions and market agents and farmers. These collected primarily qualitative data. Responses to the farm survey have been captured in Excel spreadsheets designed to mirror the instrument and to enable comparative analysis. Analysis has sought to identify key issues and themes emerging from the interviews with various informants and has focused on comparing and contrasting the perspectives of producers, market agents and officials.

# 3 THE MARKET ACCESS PROGRAMME (MAP)

## 3.1 THE DESIGN OF THE MAP

This section summarises an overview of the MAP programme design, based on a review of the programme documents.

### 3.1.1 DELIVERABLES

The MAP was originally designed to achieve the following deliverables:

- 'Profiling and or proper assessment of projects to identify gaps and/or areas of intervention with a major focus to market access although not limited to it;

- Develop a year to medium term plan while also highlighting long term issues;
- Identify marketing opportunities for emerging farmers in high value, niche markets and value adding enterprises or general mainstream at both local and international level;
- Facilitate the uptake of the identified market opportunities by negotiating sustainable contracts with buyers/businesses/firms at both local and international level;
- Assist emerging farmers in facilitating market arrangements, e.g. coordination of match making opportunities and or business to business visits at both a local and international level. This will include identification of training on market access issues and especially relevant to exporting to the international market. The service provider will be required to organise all activities of an annual overseas trip i.e. the identification of overseas buyers and any complimentary activity/event/institution to the project and or the department, making appointments and all logistics pertaining to the trip (passports, visa, booking of airplanes etc.);
- Assist emerging farmers in implementing initiatives flowing from the buyers product needs, e.g. drawing (drafting) emerging farmers plant schedules based on off-take agreements and ensure co-ordination thereof; technical assistance on compliance issues such as Global Gap, HAACCP, MRL etc.; and
- Facilitate other linkages to include but not limited to processing, packing, storage, transportation, credit etc.' (WCDA, 2009:4).

### 3.1.2 OUTCOMES

The programme was designed in order to achieve the following desired outcomes:

- Increased incomes of farmers;
- Increased employment on farms;
- More rapid growth of emerging farmers/producers businesses;
- Improved capacity of emerging farmers/producers business to respond to market opportunities and access other resources (WCDOA, 2009:10).

### 3.1.3 IMPLEMENTATION APPROACH

CASIDRA were hired to implement the programme and in turn hired OABS Development Agricultural Consultants. OABS defined the parameters of the project as:

*[Undertaking] an intensive and comprehensive approach to guide BEE and intervene by addressing existing market access barriers on the entire value chain (up & down stream)...*

(OABS, 2012:2)

Secondary objectives were identified as firstly understanding the current status of black producers; their 'capacity and constraints' and a review of existing trade agreements related to NEPAD. Subsequently identifying and linking target markets at both a local and international level and drafting action plans to unlock these market opportunities. A critical aspect of the project is OABS' role in facilitation in terms of organisation, management and organisation as well as ongoing M&E. OABS used the following approach to informing the planning of their methodology around market access, taking into account the three basic components of any agricultural market. These include:

- The supply side;
- Transaction costs;
- The demand side.

OABS has argued that restrictions on the supply side need to be addressed and removed in order to successfully and profitably meet demand. This requires that the implementation of the market access programme is carried out on two levels:

- Market readiness (basically the Agricultural products supply and the transaction costs block issues in the figure); and
- Market access (demand: market block in the figure (OABS, 2013:ii-iv).

OABS worked with 35 farmers during the project. The core methodological approach was that of:

- Phase 1: Organizing the effort, project inception, status quo analysis;
- Phase 2: Opportunity scan, needs assessment, GAP analysis, defining farmers objectives (business plan/strategy for each project);
  - An expected outcome of phase 2 (Opportunity Scan) was to identify solid partnerships with other actors in the value chain who could offer inputs, training and offtake agreements.
- Phase 3: Development of a strategic plan to reach the objectives
- Phase 4: Market exposure facilitation (domestic and international), Market co-ordination & exploitation of a master plan for implementation. The expected outcomes of this phase was to:
  - Increase the farmers knowledge of the supply and trade structures and business practices in the EU,
  - Gain a better understanding of the logistical chain,
  - Gain a better understanding of the techniques of matching their exportable products with the requirements of EU markets – conventional and organic,
  - Improve their skills, knowledge, and experience in designing and implementing their product specific export market plans,
  - Share their knowledge and experiences with those of colleagues/co owners in their respective businesses,
  - Enter into a contractual relationship with importers, buyers or retailers/retail foundations, and
  - Above may include contract farming as an option with assistance from the partners in the MAP.
- Phase 5: Facilitation of related market linkages, and a development of a master plan for implementation;
  - An expected outcome of phase 5 was to solidify previously identified partnerships with other actors in the value chain who could offer inputs, training and offtake agreements.
- Phase 6: Monitor and Adjust;
- Phase 7: Final project report (OABS, 2010).

The phases were designed in order to address: the supply side, transaction costs and the demand side, and focussed on both market readiness and market access.

### 3.2 OVERLAPS BETWEEN MAP AND THE SCLP

A separate programme initiated by the National Agricultural Marketing Council (NAMC) commenced in October 2010 to assist emerging producers to become compliant with Global Gap standards. This programme originally had a national reach and the SCLP initially visited and three groups of producers – fruit farmers in Ceres, vegetable producers in KwaZulu Natal and citrus producers in Fort Beaufort in the Eastern Cape. The fruit farmers in Ceres were subsequently selected as the focus of the programme.

It appears that shortly after the SCLP programme was initiated staff responsible for programme implementation in the Ceres area noted that there were a wide range of role players interacting with the farmers and suggested that a meeting be called to coordinate these efforts. It was also NAMC's general policy to liaise with the Provincial Departments of Agriculture when undertaking activities in a particular province. This led to meetings between the NAMC and the WCDOA where it was agreed that in future support to the fruit farmers would be provided by SCLP while OABS would focus its work on livestock and vegetable producers. This brought about a significant variation in the design of the original MAP programme, reducing the operational footprint of the OABS service provider, but potentially increasing the depth of service which could be provided to livestock and horticultural producers which became their focus from the second year of the programme.

## 4 FINDINGS: EFFECTIVENESS

This section presents the principal findings from the evaluation in relation to the effectiveness of market linkages, training and capacity building, provision of technical advice and compliance with standards and regulations. The key questions and expected responses which framed this section of the enquiry are outlined in the table below. The findings compile perspectives of WCDOA officials, the OABS implementing agency, the SCLP, farmers and marketers.

### 4.1 MARKET LINKAGES

Key Questions	Results Explored
To what extent and how have the market linkages introduced through the Market Access Programme been exploited and sustained?	<ul style="list-style-type: none"> <li>• The number and type of market linkages initiated , the number of farmers linked to markets through the Programme and the number of farmers that have been linked but have never supplied or are no longer supplying those markets;</li> <li>• Where this has happened, the reasons for farmers not considering and/or discontinuing their supply to markets;</li> <li>• How market opportunities were identified and negotiated and the effectiveness of different approaches in different circumstances;</li> <li>• The involvement of farmers<sup>2</sup> in the identification and negotiation processes and the relevance and influence of their involvement or lack thereof;</li> <li>• What external (non-programmatic) factors had an influence on whether market linkages were developed and sustained and what was the relative contribution of the Market Access Programme compared to these?</li> </ul>

#### 4.1.1 WCDOA PERSPECTIVES

WCDOA noted that when the programme was designed, WCDOA's perspective and assumption was that smallholders already had products and were ready to access local and export markets. Through implementing the programme WCDOA quickly discovered that farmers were either not producing the right product demanded by the markets, or where they had produce it was not of the right quality.

WCDOA reported that participant evaluations from market exposure visits reported that MAP had provided important exposure for the relatively few farmers who were market ready. WCDOA informants reported that prior to MAP many farmers did not know how the formal produce markets operated. Many sold produce

<sup>2</sup> According to the TOR, the words farmer and agribusiness have been used inter-changeably, in some cases "farmers" could also mean agribusiness.

through informal markets sold on a cash basis. This contrasted with selling through the formal markets which entailed provision of goods on credit and entailed delays in payment. WCDOA was of the view that producers had benefitted from their exposure on overseas trips / conferences. They stated that these exposure visits had contributed to improved unity and networking amongst small producers who shared and used their connections for marketing. The key challenge however was how to sustain the linkages that were created or strengthen existing linkages where these existed. In the case of the fruit farmers many of them were already linked into export markets so the purpose of MAP was to try and strengthen existing relationships. Producers' commitments to the maintenance of market linkages established or consolidated through MAP depended on their analysis of the prices that they were offered, coupled with their assessment of associated transaction costs. Overall producers tended to prioritise price over the advantages of contracts which provided long term continuity of supply. A potential weakness in the market linkages component was the limited involvement of farmers in negotiating letters of intent with market agents as a precursor to contract negotiation. This meant that often producers perceived terms and conditions which formed part of these agreements to be restrictive.

In terms of livestock slaughter and sale WCDOA noted that disease control and the management of abattoirs was a provincial competence and that the Meat Safety Act requires that producers sell through livestock for slaughter at abattoirs. MAP had been instrumental in providing livestock producers with access to abattoirs where OABS had approached different abattoirs and facilitated the signing of a letter of intent to enable livestock producers in the programme to sell to the abattoir. Despite these requirements and marketing opportunities WCDOA noted there was limited slaughter of stock through the abattoirs as many small producers preferred to sell from the farm gate. Informants interviewed were of the view that overall MAP had not enabled livestock producers to improve quality or market access in a systematic and sustainable way.

WCDOA informants noted that MAP had had an indirect positive influence on ostrich farmers, although this impact was not specified. They were of the view that the ostrich industry had lower entry barriers for emerging farmers than other livestock sectors.

Similar processes to facilitate market access had been initiated for vegetable growers with Subtropico, Food Bank and Agroco. However WCDOA informants were sceptical as to whether these linkages had been sustained. They reported that many producers lacked sufficient quantities to supply the market and the irregular nature of their supply meant that they were unable to meet buyer demands. Market linkages had been identified through WCDOA networks and contacts of OABS. Again the limited involvement of farmers in the actual negotiation processes around these contracts was highlighted as a potential weakness. This meant that producers could be tied into formal "contracts" without necessarily fully understanding their obligations.

There was an acknowledgement that market linkages were strongest in the fruit sector. Fruit producers had benefited from MAP because of increased exposure to the markets and there were examples where producers were now exporting directly through the Fresh Fruit Export Council (FFEC) with assistance from service providers. As noted above there was also an acknowledgement that external non-programmatic factors had played a significant role in influencing the extent to which market linkages were developed and sustained.

WCDOA stated that as a result of MAP and NAMC initiatives some fruit farmers had access to new markets, gained new skills and established new contacts. Fruit farmers have collaborated with pack houses to export their produce. WCDOA informants also felt that many wine producers were "too big for MAP" and use different methods to market their products including wine tastings and displays.

Those WCDOA officials who had direct involvement in the MAP programme with responsibility for visiting and responding to farmers, sending samples to market, setting up training and addressing compliance issues were of the view that despite challenges MAP had made a difference. They argued that many farmers had been able

to improve the quality of their produce or products and some of those who previously had been exporting through agents had been enabled to export directly while others had been linked to additional or new markets. However there was also an acknowledgement that MAP first had to ensure market readiness and ensure that producers understood market expectations and compliance requirements. In many instances producers had had to be taught about these issues from scratch.

The Department had initiated a contract with Food Bank for local supply of fruit and vegetables and grains, with branches of SPAR, Roelcor Meat and Inthaba Processing for jam. The contract with Roelcor was duplicated by OABS as a result of lack of communication with the Department. MAP had also enabled negotiations with FPEF to enable some farmers to export fruit directly to Europe. Overall Food Bank was the biggest market opened up by MAP which helped the majority of farmers. A contract was also negotiated with Big Brothers, one of the market agents at the Epping market, however WCDOA informants highlighted that continuity of supply remained an issue. WCDOA revealed that continuity of supply could also be exacerbated by the policy of the marketer. Apparently Food Bank which has a mandate to support all small farmers tends to avoid sourcing produce from one farmer on a continuous basis. Food Bank also tends to shift its areas of operation which meant that many farmers had been once off suppliers although there were some examples of where produce was supplied on a more regular basis.

During discussions, it was observed that WCDOA, in exceptional cases, had also assisted with transport to enable producers to get produce to market which had involved hiring vehicles or in some instances hiring vehicles with drivers. It was unclear from the interview as to whether the costs incurred in this process were factored into the cost structure of getting goods to market and whether this was sustainable in the long run. However, it was noted that transport to market was not part of the services rendered within the MAP.

WCDOA noted that although the programme emphasis was on accessing formal markets, there were also instances where some farmers had also been linked with informal markets “because market is a market and not all farmers are able to compete in the formal market” (WCDOA informant).

#### 4.1.2 OABS: MAP SERVICE PROVIDER PERSPECTIVES

OABS reported that they had been appointed to assist the Department to actively create market access for a total of thirty-five emerging farmers of whom ten were selected for international market access while twenty-five remained focused on domestic markets. OABS understood that their task had two dimensions. Firstly, they were required to identify general market access barriers and constraints, build capacity of participating farming groups and identify market opportunities. Secondly, at a project level they were required to assess the current position of participating farming enterprises, conduct an analysis of shortcomings and develop a plan together with the producers for future management of the enterprise.

The OABS team consisted of three coordinators – one for vegetables who also doubled as the overall project coordinator, a livestock and a fruit sector coordinator. Subsequently a separate but parallel programme was run for fruit producers by NAMC managed by a specialist, who had initially been part of the OABS team in a technical support role.

According to OABS, the WCDOA did not specify implementation phases within the terms of reference and left it to OABS to work this out for themselves. This suggests the need for improved institutional arrangements and process management should the programme be extended. OABS noted that since starting with the MAP programme in 2010, they were never totally clear that their contract was going to be extended from one year to the next. This lack of contractual certainty limited the extent of their engagement and the limited number of farm visits meant that much of the focus was on the first component outlined above. For the service provider to properly support and complete strategic plans together with participating farmers more time and budget

would be required. The service providers argued that a longer period of contract / appointment was essential in order to properly complete the task. However, as noted by WCDOA officials current regulations prevent awarding of service provider contracts for a period longer than two years.

OABS held workshops with farmers every year which examined market access for different commodities and clarified what is required of producers seeking to enter these markets. OABS coordinators also met with individual producers to begin a process of developing enterprise business plans. These employed a standard format providing an introduction with a brief project background, a high level problem statement and description of programme objectives, a strategic approach, expected outputs and an outline of the strategy plan. A four step strategic approach was outlined starting with a consideration of the status quo established through an analysis of strengths and weaknesses opportunities and threats (SWOT). The second step was to develop a vision of where producers wanted to be. The third step set out to elaborate more detailed plans of how to get from the present state to attain the desired future, while the fourth stage involved assessment of performance in order to establish the extent to which the vision and plans had been successfully implemented.

Generic plans examined include a physical project description, status quo assessment established by means of a rapid SWOT analysis, a needs assessment and objective formalization, a gap analysis and strategy formalization. These plans were also intended to include marketing and production plans combined with a capital and cash flow budget; an implementation plan and indicators for monitoring and evaluation.

However OABS informants noted that the emphasis on market access and market linkages was misplaced in that many of the producers were not market ready. This required development of a measure to determine whether farmers were market ready which involved their ability to ensure a regular supply of product. The 25 farmers who would produce for the local market and the 10 selected for production for international markets had not been pre-selected by WCDOA so OABS undertook to survey the farmers. The survey indicated that ten out of the thirty-five were not market ready but they were included in the programme anyway. Subsequently a further five of the domestic producers dropped out from the MAP programme.

OABS informants reviewed the modest successes of market linkage initiatives and highlighted a range of challenges impacting on their sustainability and effectiveness. There had been some success stories. The example of Chamomile farm was advanced in this regard. Market linkages had been established for Chamomile to supply Freshmark resulting in sharp increase in the volume of sales by an estimated one million rand over a period of twelve months. However this project appeared to be something of an exception.

With regard to the livestock sector OABS reported that they had secured agreements with abattoirs in Beaufort West and the Winelands and those farmers in the area had begun supplying these abattoirs with sheep as a result of this initiative. Overall however OABS were of the view that the livestock producers should not have been included in MAP as they required a lot of work to get them market ready. Many of the producers in the Beaufort West area had acquired land through the land reform programme where land was held on behalf of many beneficiaries by a landholding entity. Many of these entities were dysfunctional and in the majority of cases where many beneficiaries had rights to the property there were no agreed decision-making processes. One of the properties included in MAP was a trust which reportedly had 3,500 beneficiaries.

OABS also reported problems which were experienced in other areas and sectors. Some of these reflected member contestation and institutional dysfunctionality. On a property where there were eight members in a development trust, OABS organised an agreement to supply KaapAgri. However, one of the trustees refused to sign off on the deal resulting in its cancellation.

Other issues related to farmer dissatisfaction with market prices negotiated. In the horticultural sector an agreement with Subtropica committed farmers to deliver horticultural produce for a fixed price over a period

of eight months. However fluctuations in fresh produce market prices during this period resulted in producers renegeing on this agreement as they perceived they had been locked into contractual arrangements which paid lower prices than those currently prevailing in the market. Farmers withdrew and opted to supply local hawkers instead. OABS reported that the negotiation of agreements had involved the farmers, OABS and the buyers. However, if the supply was going to be irregular or producers defaulted, it became OABS' obligation to inform the buyers. This suggests that although producers were part of negotiations some perceived that contracts had effectively been negotiated on their behalf without their active engagement.

In the case of Groenkraal farm OABS had negotiated linkages with Woolworths and Freshmark. These agreements were abandoned after the producers were approached by a pharmaceutical company to produce yarrow instead of vegetables. This was not part of their business plan but illustrated farmers changing production in response to alternative market opportunities. OABS cited examples of other producers making decisions to change their production focus altogether without clear plans to support their new choices.

OABS's overall perspective on the programme was that "the difficulty is not in identifying the market but getting the farming right". They also observed that on one of the PLAS properties where the Department of Rural Development and Land Reform leases the farm to beneficiaries there was reluctance by producers to engage in long term planning. This was also the case on land owned by the Moravian church where producers were uncertain about their long-term rights in land. OABS highlighted that tenure uncertainty and challenges emanating from unsupported group ownership often put a brake on realizing the agricultural potential of the land. At the same time a long history of poor inter-governmental relations between DRDLR and WCDOA had created challenges and OABS reported two state institutions had found themselves in conflict on one of the PLAS where DRDLR as the landowner had reportedly barred them from accessing the property.

#### 4.1.3 SCLP PERSPECTIVES

As noted in the section above it was agreed that fruit farmers in the MAP programme would fall under the SCLP – a parallel project of the NAMC. Many of these producers were not producing for export and for these producers the SCLP informant reported that their intervention "shifted the farmers' market access to linkages from the very basic hawker supply to juicing and canning". Some of these farmers were supported to pack for Shoprite/Checkers adding more value on the market side while some other farmers were assisted to get into the export markets.

The SCLP informant observed that in the fruit sector strategic partners and pack houses are both "market players and the referee and are undercutting farmers". This created the risk that farmers became tightly incorporated into "dependent market relationships" with the pack houses.

The SCLP informant was of the view that "the value of the programme would have increased substantially if all the other aspects that is required of a market ready farmer were in place". While the SCLP had had some success in improving market access for its cohort of fruit producers, there some who were critical of the foundational premises underlying current state strategies of support for emerging farmers. According to SCLP these problems frequently originated in the land reform programme and the poor choice of the land selected for purchase. While the informant indicated some flexibility within the SCLP to adjust to the programme which permitted a "focus on 'fixing' what is fixable among the target group", the informant was of the view the national Department of Agriculture "did not do its head-shift even though these aspects had been pointed out to on numerous occasions" indicating a reluctance to respond to critical feedback and realities on the round.

As with OABS, the SCLP informant underlined the fundamental distinction between market readiness and market access. In his view this was not sufficiently addressed as part of programme design which in turn limited the programme's ability to make and sustain market linkages. This design flaw cascaded throughout



the programme requiring a redirection of training and capacity development initiatives and the focus of technical advice. In some instances it called into question the investment made into certification and compliance readiness.

#### 4.1.4 PRODUCER PERSPECTIVES

The majority of these producers were not market ready and thus in a weak position to access markets through the programme, remaining reliant on informal local markets. Many of the producers in the fruit and wine sectors appear to have accessed markets prior to the implementation of MAP. However some producers report that their exposure through the programme was beneficial and identify specific benefits which they received.

A total of 12 producers out of the 34 (35%) who were interviewed indicated that at least one type of market linkage had been initiated, while 6 provided a qualified response and 16 producers (47%) said that no market linkages had been created. Of the 12 producers who indicated that market linkages had been created 6 (17% of the total number of producers in the programme) reported that they continued to utilise those linkages. Ten producers indicated that they had identified markets at their own initiative while 8 stated that these linkages had been established with input from WCDOA or its agents.

Producers reported a low level of direct involvement in the negotiation of market linkages. Twenty-five out of 34 (73.5%) producers identified external non-programmatic factors which impacted on whether market linkages were developed or sustained.

Those producers with a positive response indicated international market linkages (ASDA UK, Scandinavian and European markets, export of grapes to China in 2012) while others were domestic (Food Bank, AFASA, Pick N' Pay, ShopRite, McCain, unspecified local supermarkets, canners and pulp markets). Several fruit producers indicated that they were already tied into marketing arrangements with existing pack houses prior to the SCLP and MAP interventions.

Other producers reported that while they had explored market opportunities they were not in a position to exploit these. Reasons cited included not having Global Gap accreditation, 'dependent marketing relations' with local export pack houses which prevented individual farmers from entering into independent market agreements, contractual limitations, lack of production capital, cash flow constraints and the inability to complete Eco-cert and other certification due to financial constraints.

## 4.2 TRAINING AND CAPACITY BUILDING

Key Questions	Results Explored
How and to what extent have training and capacity building offered by the Market Access Programme helped farmers and agribusinesses in identifying new market opportunities and/or sustaining existing ones?	<ul style="list-style-type: none"> <li>• How farmers were trained and how their capacity building needs were identified;</li> <li>• The use and value of gaps identified in preparing for and providing capacity building;</li> <li>• The extent to which farmers were capacitated in areas where they needed intervention;</li> <li>• What farmers learnt through the capacity building initiatives, including what they learnt about their own capacity building needs;</li> <li>• What influence the information and experiences gained during training and capacity building had on achieving access to new markets and /or sustaining access to existing markets;</li> <li>• What external (non-programmatic) influences assisted farmers in identifying new market opportunities and/or sustaining existing ones, and what was the relative</li> </ul>

Key Questions	Results Explored
	contribution of the Market Access Programme compared to these?

#### 4.2.1 WCDOA PERSPECTIVES

WCDOA noted that farmers were at different stages and they required training at different levels. OABS provided a combination of general training and specific training involving both classroom and practical dimensions. MAP farmers got better access to information and technical advice and therefore could make better decisions. However, in some commodities finding specialists remained a problem. There are not enough extension officers and extension officer training is inadequate particularly in the horticulture sector.

WCDOA informants stated that producers got better access to information and technical advice through MAP and that this enabled them to make better decisions about their production. This training and capacity building had been provided primarily by OABS but also through farmer information days which were organised by Farmer Support and Development. These were more ad hoc had slots for veterinary services to participate. Informants did not rank the contribution of MAP training and capacity building to help identify new markets very highly. They rather valued more technical training to improve quality of production for its contribution to improving market readiness.

WCDOA highlighted how OABS had undertaken a preliminary survey and an individualised SWOT analysis for each participating producer. OABS subcontracted Sikhula who undertook an in-depth survey and a skills audit to inform training design. MAP had offered a variety of two-day workshops customised for farmers producing different commodities. In addition:

- selected fruit, wine vegetable producers attended a two-day workshop together with tradeshows and some were selected for the trips to Nigeria and Europe; and
- selected producers had also attended the Making Markets Matter Conference and a Packaging Conference.

WCDOA identified a range of external non-programmatic factors which had played a role in identifying markets and sustaining existing ones noting that the fruit farmers were already involved in other forums which meant that they had additional exposure and marketing opportunities external to the programme. Some livestock producers were associated with NERPO and had exposure to informal mentors.

WCDOA also highlighted that while extension officers provided practical advice producers could choose whether to adopt their recommendations or not. The WCDOA informant noted that the buyer was the main influence on producer's production decision-making as buyers determine the prices for different commodities. The linkage between producers and buyers made producers aware of what particular markets required and how they needed to improve their quality if they were to access these markets. WCDOA was of the view that MAP training had contributed to an improvement in the quality of produce. With regard to livestock these improvements had been partial while for vegetables and fruit he rated these as high and very high respectively. There were a number of non-programmatic influences assisting farmers to identify new market opportunities which included incentive programs operated by the Department of Trade and Industry (DTI) together with various commodity organisations.

WCDOA was of the view that fruit and wine farmers, livestock farmers vegetable and small grain producers had been linked to markets both locally and internationally. It was noted that commodity organisations played

an important role in capacity development and this is where key expertise could be located. These included Grain SA, VINPRO, and HORTGRO.

#### 4.2.2 SERVICE PROVIDER PERSPECTIVES

OABS was initially only in a position to make four site visits - one each quarter to farms participating in the programme in the first year. The first year of the programme focused on assessing enterprises and commencing with business plan development. Initial visits made it clear that none of the producers had enterprise budgets so OABS worked to produce these although there is little evidence to suggest that this had much impact on the majority of projects.

Business planning continued into the second year where the focus was on rolling out the plan. However OABS encountered a number of constraints which impacted on the business planning and implementation process. Most of the producers did not have any management information system and did not keep records. The majority of producers were not computer literate which meant that computer based management systems and programmes were of no value. The plan itself was inaccessible to some producers.

In the second year of the programme the number of visits per farm rose to six – once every two months. Within this period market linkages started to be set up and there were various visits conducted to retailers – sometimes with farmers present and at other times without them.

OABS informants reported that they were not formally introduced to extension staff when the programme commenced and even though extension staff knew about MAP activities they were often unclear as to the role which they should be playing in support of MAP objectives. OABS tried to involve agricultural extension officers to assist with getting producers market ready. While some of the extension officers did an excellent job there was a high staff turnover reported among extension personnel. In one area the extension officer changed four times in the course of a single year. A further constraint is that many extension officers originate outside of the Western Cape and lack proficiency in Afrikaans which is the language spoken by the majority of producers in the MAP programme. Clearly the uncertainty about extension officer roles and the variability of their input was a significant factor impacting on the capacity development component but on the MAP programme more broadly.

OABS noted that the main function of business plans was to enable certain producers to obtain finance. Record-keeping, albeit basic was also regarded as an important contribution. The training needs and capacity gaps were identified in the profiling and gap analysis while the actual training was subcontracted to an associated company Sikhula Agricultural Training. The annual training programme started with an orientation session followed by one two-day workshop each year with one day focused on retail, finances and financial management and a second day involving visits to markets. OABS reported that course evaluations completed by participants placed value on the market visits where producers could get first-hand information from potential buyers.

In addition to training each year ten farmers went on a seven day international trip. OABS was responsible for organising the trip in the first year of the MAP initiative which focused on fruit wine and table grapes. In year two PPECB organised a trip for twelve farmers of who five were from MAP and seven from other provinces who visited the Fruit Logistica exhibition in Germany. In the third visit was organised by the Department of Agriculture.

#### 4.2.3 SCLP PERSPECTIVES

The SCLP informant put forward strong arguments for a much stronger programme of capacity development and support to enable farmers seeking integration into domestic and global value chains to put key fundamentals in place.

*Emerging farmers are administratively and financially weak and chaotic and this is a vital difficulty. There is no training in place to address financial and business acuity and to bring this up to professional standards that the industry requires...If there is urgency about making emerging farmer projects work, the commitment ought to be to make a farmer successful, to move through the stages, to support sufficiently and not to pull out until commercial viability had been reached. The MAP cannot be expected to solve these problems but it can also not ignore it.*

(SCLP informant)

According to SCLP “some farmers had been through the business planning process but they did not receive their business plans from OABS”. SCLP was of the view that there was no plan to work with the Ceres farmers and that there are “farmers included in the programme that are not viable and unless they receive substantial support will never be financially viable” which meant that there are “very few value-chain performers among the emerging farmers.” This statement recalls an earlier statement by OABS that people were included in the programme who did not meet fundamental standards of market readiness. It also asks questions about the role of CASP in supporting producers who lack economies of scale to be viable in the marketplace.

#### 4.2.4 PRODUCER PERSPECTIVES

Producers didn’t always find it easy to differentiate training and capacity building delivered by MAP from that provided by extension officers or commodity groups. Only 18 of the producers (52%) interviewed were able to identify some form of training which they had attended which originated through the MAP initiative. However 11 producers (32%) interviewed were able to provide positive responses as to the extent which training and capacity building provided had addressed their particular needs. These producers identified benefits derived from business planning, a greater understanding of their business and how the relevant markets work. They also identified the importance of product quality as a precondition for accessing markets and the need to focus both on production and marketing within the business. These producers tended to be larger fruit producers although there were producers in all production categories who reported benefits from training. However only 4 producers (11%) provided specific responses to illustrate how information and experience gained during training and capacity building had facilitated access to markets.

Seven of the producers (20%) interviewed had negative responses to the training provided. Where reasons were provided these included questioning the relevance and appropriateness of some of the training topics while just under a third of respondents (32%) provided no response in this regard. Some producers noted that they remain dependent on other government programs such as CASP or RADP to provide support before they could realise the benefits of training and capacity development.

### 4.3 TECHNICAL ADVICE

Key Questions	Results Explored
3) How and to what extent has the technical advice offered to farmers influenced them to deliver better quality produce and thereby gain access to	<ul style="list-style-type: none"> <li>• The type of technical advice that was given to farmers;</li> <li>• How farmers received advice offered by technical consultants;</li> <li>• The extent to which technical recommendations given by technical advisors were followed and implemented;</li> <li>• Whether and how the technical advice offered to farmers result in improved quality;</li> <li>• Whether improved quality enabled farmers to access high value market;</li> </ul>

Key Questions	Results Explored
high value markets?	<ul style="list-style-type: none"> <li>• What external (non-programmatic) opportunities to receive technical advice had an influence on production quality and access to high value markets, and what was the relative contribution of the Market Access Programme compared to these?</li> </ul>

This component of the MAP programme was somewhat poorly specified. This reflects the fact that technical information comes from a variety of sources within and outside the programme. As is discussed further below the service provider did not initially see the provision of technical advice as part of their brief. However there was an increased emphasis on its provision in the second year of the programme. Overall however informants tended to provide more generic responses on the effectiveness of the technical advice provided than the expected responses indicated in the right-hand column of the table above.

#### 4.3.1 WCDOA PERSPECTIVES

WCDOA confirmed that there were a range of actors providing technical advice and that these included DTI trips and initiatives. The NAMC has assisted farmers primarily in the fruit and wine sectors while Hortgro has enabled producers to improve the quality of their fruit stock. WCDOA observed that MAP technical advice probably amounted to 50% of the total of advice which producers received.

In exploring the various sources of technical advice WCDOA noted that currently the role of extension officers provided was to provide advice on general farm production such as pest control, the timing of harvest, irrigation advice, the application of fertiliser and the pruning of trees. Extension staff also make linkages between farmers and external specialists and process CASP grants. WCDOA noted that the principal source of technical advice came from technical representatives of fertiliser, seed and pesticide companies as part of their sales service. The Agricultural Research Council (ARC) can also make available technical specialists, although no evidence was provided that these specialists had been called upon as part of the MAP programme. In the case of fruit farmers there was less need for technical advice as many of them had long experience in the sector. Although according to one WCDOA informant fruit producers in Ceres had been assisted to grade their fruit and market it to supermarkets. In her view the technical advice to fruit producers had a significant impact. WCDOA was also of the view that technical advice had had a limited impact on livestock producer's ability to access new markets. These sources of support and advice were supported by practical and hands-on workshops delivered by the service provider.

#### 4.3.2 SERVICE PROVIDER PERSPECTIVES

Technical support in the programme varied according to the sector. OABS noted that technical support was not originally part of the MAP brief. The need to provide technical support had been motivated by OABS following their initial visits to farms. A livestock specialist spent a week in Beaufort West with farmers – however many did not attend this session. A fruit specialist provided support on production matters to farmers in the MAP programme while there was no technical advice given to vegetable producers on the programme as many of them have been producing vegetables for a long time and have the requisite skills. Two of the new vegetable producers reportedly received advice on technical aspects of production from market buyers as opposed to OABS staff.

#### 4.3.3 SCLP PERSPECTIVES

The SCLP informant was concerned about the low levels of support generally supplied by extension officers who were “not technical experts in agricultural areas and are simply an administrative arm to apply for CASP.”

But according to SCLP expert technical advice had enabled farmers to improve the quality of their fruits with the exception of those that did not have sufficient resources who therefore did not receive technical support.

#### 4.3.4 PRODUCER PERSPECTIVES

Eleven producers (32%) indicated that technical advice received during the programme had in some way enabled them to improve the quality of their produce, although the answers to this question were seldom direct. A total of seven producers (20%) indicated that this had helped them access high value markets of whom three were able to provide specific examples. Twenty producers (58%) indicated that they had received some type of advice while 19 (55%) indicated that they had implemented some aspect of the advice received with 16 (47%) indicating ways in which advice emanating from the MAP initiative had helped them. Notable however is that 11 producers (32%) had no response to this question. As with other categories many (20) producers (58%) identified non-programmatic opportunities to receive technical advice which had an impact on their production. The variety of production circumstances and associated opportunities for different producers makes it difficult to meaningfully attribute directly impacts of technical advice received through MAP.

The non-programmatic sources of technical advice included advice and courses from BKB for livestock producers, Hortgro for fruit, and the Koue Bokkeveld Training Centre, agents of agrochemical and fertiliser companies, established commercial farmers and in some instances extension officers.

### 4.4 COMPLIANCE WITH STANDARDS AND REGULATIONS

Key Questions	Results Explored
4) How and to what extent have compliance with standards and regulations influenced market access?	<ul style="list-style-type: none"> <li>• Farmers' thoughts and attitudes regarding compliance with food safety, quality, ethical, environmental and business standards;</li> <li>• How compliance with food safety, quality, ethical, environmental standards and business regulations have influenced farmers' businesses;</li> <li>• Whether and how any opportunities for market access were gained or missed out as a result of compliance or non-compliance;</li> <li>• Whether and 'how' the Market Access Programme helped farmers to comply;</li> <li>• The value that has been added to businesses through compliance with food safety and quality standards, ethical and environmental standards and business regulations;</li> <li>• To what extent and how did the Market Access Programme support compliance in these areas?</li> </ul>

#### 4.4.1 WCDOA PERSPECTIVES

WCDOA noted that a budget had been allocated for fruit and vegetable farmers to support them obtain certification. The PPCED had assisted with a graduated system which first introduced farmers to SA GAP and then moved them on to secure Global Gap compliance. This often required that the farmer meet specified infrastructure requirements such as having proper storage for chemicals and pesticides. This required the programme to apply for these resources from CASP and here they ran into a problem in that there were often delays in obtaining CASP funds from DAFF. Such delays would prevent the producer from securing compliance and thereby prevent them from accessing markets. The need to see the connections between MAP and CASP was identified and emphasised. A WCDOA informant noted that many producers could not cope with the administrative work associated with securing and maintaining compliance. This was often too expensive and time-consuming and did not result in significant benefits for farmers, although it potentially helped with sales. This meant that overall compliance with standards and regulations remained low.

WCDOA informants identified a wide range of legislation and regulation governing livestock production and slaughter including the Meat Supply Act, the Animal Diseases Act and certification standards for abattoirs. WCDOA rated compliance with these standards as low amongst the majority of livestock producers, many of whom operated outside these parameters.

WCDOA noted that there were a number of standards and regulatory systems for different commodities. In the fruit sector many producers had already obtained Global Gap compliance prior to being included in the MAP programme. PPECB was working with vegetable producers to enable them to become SA GAP compliant. However the programme had only had a partial success in assisting producers with compliance requirements

WCDOA noted that the school feeding scheme required Global Gap compliance for producers to be accepted to supply produce. More than 70% of farmers could not comply with the standards. Only farmers who were actively in markets that required compliance could afford to take this on. As noted by other informants compliance often had infrastructure implications which many farmers did not have which disqualified them even before an audit could take place.

WCDOA focused much more on the alignment of different initiatives and made linkages between CASP and MAP. WCDOA noted that compliance is a key constraint for many producers and for some farmers it is overwhelming and they give up resupplying informal markets which have no compliance constraints. Despite acknowledgement of these constraints the informant noted that MAP had provided support to producers in the three sectors but that less than half the producers in the livestock and horticultural sectors were compliant while 75% of fruit producers could comply with the required standards and regulations.

#### 4.4.2 MAP SERVICE PROVIDER PERSPECTIVES

OABS noted that with regard to standards and regulations Global Gap is the most important in that it incorporates all the others. The Supply Chain and Logistical Programme (SCLP) of NAMC, which started in September 2010 with donor funding, aimed to ensure that fruit and wine producers were compliant with Global Gap standards.

OABS noted that for livestock producers, abattoir slaughtering requires SA Gap or Global Gap certification. In the horticultural sector farmers also were able to find ways around certification by piggybacking on farmers which had already received certification. For example, Chamomile farm packs and distributes its vegetables through Crunchy Carrots. Overall they observed that securing compliance with SA and Global Gap standards is an expensive business which often has infrastructural implications. To date the WCDOA has supported and funded emerging farmers certification costs, although with respect to meeting infrastructure standards applications have to be made through CASP which can be a time-consuming process.

#### 4.4.3 SCLP PERSPECTIVES

The SCLP informant noted that for the fruit farmers in Ceres SCLP had to take care of the packing aspects because many farmers did not have Global Gap certification and their produce volumes were too small to warrant the costs and time required for the certification process. According to the SCLP informant there was only one fruit farmer in Ceres with Global Gap accreditation while another producer had qualified for SA Gap. Even the local canning contracts which had been negotiated were cancelled because the producers did not have SA Gap certification. This meant that producers either had to supply the pulp or juicing market where standards were less stringent but prices were lower.

SCLP had since entered into an MOU with PPECB, who appointed a consultant to walk them through the accreditation process. However the process got stuck as there was no budget allocated to pay for the laboratory tests required to assess agricultural chemical residues as part of the audit process.

#### 4.4.4 PRODUCER PERSPECTIVES

Table 7: Compliance Requirements by Producers

Tax registration	Global Gap	SA Gap	HACCP
20	14	3	2
58%	41%	9%	6%

It should be noted that the relatively high level of compliance to Global Gap cannot be directly attributed to the MAP initiative as many fruit, wine and table grape producers had acquired this through other relationships prior to commencement of the programme. A total of 18 producers (52%) indicated that they had either no or insufficient support to enable compliance and 23 (67%) indicated that they thought there were missed opportunities for improving market access. Some caution is required in interpreting these figures given that these service providers have indicated that the majority of people selected for the programme were not yet market ready and therefore not in a position to secure market access or to comply with compliance audit requirements.

Several producers identified that compliance issues did not matter to their current markets. As noted in previous sections this indicates that a significant number of producers in the MAP initiative sell produce at the farm gate and to the informal markets. Alternatively they find ways to piggyback produce onto producers who have already obtained certification. Others highlighted that applying for certification was meaningless if they were not able to meet basic infrastructural requirements which would immediately disqualify them in the audit process. There needed to be investment in and infrastructural development on properties owned by smallholders if certification was to become a meaningful opportunity.

## 5 FINDINGS: PROGRAMME DESIGN AND EFFICIENCY

### 5.1 PROGRAMME DESIGN

Key Questions	Results Explored
5) How should the programme be modified or redesigned to optimize success, minimize failures, efficiently increase reach and scale of implementation, take advantage of unexploited opportunities and pursue highest-yield programme options?	<ul style="list-style-type: none"> <li>• Recommendations regarding missed or under-emphasised opportunities for improving market access, based on findings of the literature review and the evaluation;</li> <li>• Recommendations for improving programme design based on analysis of successes and failures of programme, and emerging opportunities;</li> <li>• Recommendations for improving programme implementation (as opposed to design) building on understanding of successes and failures arising from how the programme was implemented;</li> <li>• The role that forums and linkages between farmers created through the programme may have contributed to the outcomes of the programme, and whether and how this should be developed as an aspect of the programme;</li> <li>• Recommendations regarding prospects for building on any snowball or diffusion of innovation effects that may have inadvertently resulted from the programme;</li> <li>• Recommendations regarding improving the scale and reach of the programme;</li> <li>• Recommendations regarding mitigation of risks and obstacles to the success of the programme;</li> <li>• A concise statement of the theory of change implicit in the programme design</li> </ul>



Key Questions	Results Explored
	recommendations, showing the links between the key change concepts, their implementation and the desired results; which should also be captured in a log frame format.

### 5.1.1 WCDOA PERSPECTIVES

WCDOA observed that there was a lot to learn from approach taken by SCLP with the fruit producers. This suggested that it was important to have a commodity focus rather than a generalist approach. This meant that the services provided should have a commodity focus supported by technical advice to help get farmers market ready prior to coordinating market linkages. There was a capacity gap which made it difficult to identify service providers with a particular commodity focus and expertise.

WCDOA noted that if MAP was to be extended they would need to be greater coordination with existing actors in the livestock sector such as the National Wool Growers Association and the Red Meat Producers Association. The livestock production sector would need to be disaggregated and support initiatives designed for different types of livestock production including ostriches and sheep. Livestock had received a low profile within MAP primarily because the Western Cape is not a livestock province with agricultural production focusing much more on fruit and horticulture. If MAP was to continue, more thought need to be given to the institutionalisation of the programme within WCDOA, DRDLR and its partners. MAP roles and responsibilities would need to be included in the performance statements for extension officers and animal health teams and monitored accordingly. Co-operation would have to be improved with DRDLR as this had been sub-standard for a long time. Intergovernmental relations and communication more broadly would need to be improved.

WCDOA noted that when MAP was designed WCDOA was not that sure exactly what was on the ground. There was an internal gap between extension officers and the rest of the Department of Agriculture. The programme had experienced difficulties in identifying suitable farmers for the MAP initiative and they had experienced problems with service providers as well. In order to improve MAP in the future there needed to be improved profiling of farmers and clearer audits of farm resources. MAP needed to take the long view with a view to helping farmers to move from subsistence to commercial production. Some of the WCDOA officials were concerned that perhaps the Department was pushing smallholder farmers too hard to try to turn them into commercial producers. The programme was designed as a pilot project with a view to taking small farmers and introducing them to export markets. MAP was an innovative idea. However the programme had only met 50% of its intended scope and reach in that selection of farms was poor which meant that many farmers were selected who were not in fact market-ready.

A WCDOA informant noted that early on in the programme they had realised that many farmers were not market ready and that several things had to be fixed before they could access markets. This had impacted significantly on the scale and reach of the programme as it required significant time and investment to ensure that farmers were actually ready to access markets. This also indicated that sustained engagement was required with producers to enable them to successfully embark on this journey to be in a position to access markets.

The continuity of the programme could be at risk as a consequence of leadership change and possible changes in policy priorities. For the programme to gain traction it needs to become part of the key performance areas which will ensure that it gets higher priority. Improved coordination to improve utilisation of resources from different government agents needs to be a key component in second phase design.

WCDOA noted that the language of the producers should be a key factor informing the design of the programme, noting that language particularly proficiency in English is a significant barrier. This also causes people not to make use of extension officers who cannot engage with them in their home language. The programme make needed to make better use of private sector capacity with regard to product quality market support and mentoring while continuing to build internal capacity within WCDOA.

### 5.1.2 SERVICE PROVIDER PERSPECTIVES

OABS reiterated that the missed opportunities in the programme related to farmer selection in that many of the farmers enrolled in the programme were not yet market ready. They urged that much more attention be paid to the processes of farmer selection and the criteria for their inclusion in the programme. This together with the short-term stop start nature of the programme and the uncertainty about its year-to-year continuation limited its effectiveness. From OABS's perspective the MAP programme raised farmer expectations which it could not meet. OABS also argued that the effectiveness of the programme had been undermined by a persistent lack of coordination between agents of the state which led to critical breakdowns in communication.

Overall OABS indicated that the programme had only partially achieved the scale and reach specified by its objectives. The design of the programme was compromised by poor farmer selection choices and the pressure to declare producers market ready when they were not. This led to producers being unable to guarantee consistent supply of sufficient quality and the market being disappointed at not receiving the promised goods. OABS had attempted to mitigate this by negotiating a shift in the programme to prioritise market readiness as a precursor for graduation to market access. OABS attempted to implement a 'step up process' with a focus on planning in year one and an emphasis on identifying production and market opportunities which would yield relatively rapid results that lowest possible cost.

### 5.1.3 SCLP PERSPECTIVES

The SCLP informant also noted that the support required by farmers went far beyond that specified with in their brief. SCLP had "supported farmers with their financial planning, legal aspects" This included legal support for the registration of farmer's water rights and the restructuring of the legal entity after a strategic partnership expired. The SCLP had also motivated for CASP support when needed. Overall they argued that they had been called upon to "substantial contributions that fell outside of the parameters of this programme" which indicated an urgent need to review the real support requirements required by smallholder farmers.

### 5.1.4 PRODUCER PERSPECTIVES

Although service providers have spoken about the impact of the programme on creating networks and linkages between producers only one positive response was received from producers to the question concerning the extent to which MAP had facilitated forums or created linkages between other farmers and businesses, while 7 respondents (20%) were unsure and 23 (67%) responded that no linkages had been created.

A total of 9 producers (26%) felt that the programme had achieved its intended scale and reach, at least to some extent while 11 (32%) felt that the programme had not succeeded in this respect while the remainder could not say. In this respect most producers did not elaborate on their answers – a probable reflection of interview fatigue.

## 5.2 EFFICIENCY

### 5.2.1 WCDOA PERSPECTIVES

WCDOA recognized that the programme was negatively affected by a range of administrative issues. The issuing of short one-year contracts undermined programme efficiency. However in terms of current regulations a service provider cannot be appointed for longer than a two-year period. The efficiency of the programme had been affected by lack of capacity within WCDOA and staff turnover within the extension services. Likewise economists within the Department had been lured into the private sector.

As noted above MAP was dependent on close linkages with CASP and required faster response times. Extension officers remained peripheral to MAP and their involvement in MAP was not properly formalised. There was nothing in their performance measures to indicate their responsibility and participation in MAP. MAP was hampered by continuing lack of coordination between major stakeholders who have influence on particular farms. Coordination between WCDOA, DRDLR and local municipalities remained poor. There was a need to work together to ensure a holistic approach to support the farmer and develop the farm.

### 5.2.2 SERVICE PROVIDER PERSPECTIVES

As OABS has stated in various sections above programme efficiency was compromised by a combination of poor coordination and farmer selection.

## 6 FINDINGS: RELEVANCE AND SUSTAINABILITY

### 6.1.1 WCDOA PERSPECTIVES

WCDOA noted that MAP complemented FS&D activities and in particular the commitment to ensure that 60% of land reform properties were successful during the five-year period. MAP also aligned with WCDOA's commitment to at least maintain exports at current levels. WCDOA noted that the commitment of farmers was crucial for the success and sustainability of the programme and that there remained a number of trust issues which would need to be addressed.

WCDOA confirmed the programme's relevance for black farmers and producers as well as the whole farming community and the importance of getting more entrance into the programme. However for the programme to be more sustainable there would need to be a better quality baseline survey to identify the right farmers to bring into the MAP initiative. MAP would need to be institutionalised if it was to be sustainable and would require a dedicated coordinator. WCDOA noted that the programme had started with a narrow focus on just 45 farmers who were narrowed to 35 who represented a tiny fraction of the small-scale producers in the province.

WCDOA emphasised the relevance of MAP and its contribution to making land reform projects more successful and sustainable and supporting emerging farmers and entrepreneurs. However WCDOA highlighted the continuing dependence of many producers on CASP support noting that "without CASP the land will be fallow". With respect to access to finance a WCDOA informant observed that there was very little appetite for MAFISA loans.

WCDOA informants were of the view that the MAP programme should be seen as a national flagship. One informant argued that there were producers who were now fully engaged within market value chains particularly in the fruit and wine sectors who required a little ongoing support from the Department.

### 6.1.2 SERVICE PROVIDER PERSPECTIVES

OABS strongly asserted programme relevance and the important opportunities afforded by the programme to link farmers together which was very difficult for them to achieve on their own. OABS was of the view that the benefits of the programme would persist although farmers would still need support which should come from suitably skilled extension officers. This would require that FS&D within the Department of Agriculture would

need to take ownership of the MAP business plans and work with producers to assist them with updating and implementing the plan. OABS felt that the quality of feedback provided by the Department could have been improved as part of programme implementation.

### 6.1.3 PRODUCER PERSPECTIVES

Overall 25 (73%) of producers responded that the MAP initiative was relevant to the business needs of small farmers and black entrepreneurs. Comments from producers who were critical of the MAP initiative are summarized below. Many of these comments are indications of the frustrations experienced by smallholder farmers rather than a direct critique of the MAP programme.<sup>3</sup>

*Emerging farmers need support just to become productive first, before they can deliver to any market.*

*I may not be emerging but it is difficult to farm these days and if the banks do not help or you have once had the resources, there is no support when help is needed. We have a backlog and need support to get new market. It's, no use showing us new markets and we cannot pursue those markets. It is a waste of their resources and our time.*

*We need sufficient support and cannot continue to farm on emergency funds. If we are to engage successfully in the market we need support to expand and diversify.*

*The MAP programme must be reconsidered. It creates that much needed extra mile we need. The driving power should be aligned with all the different departments and help us to consistently engage with markets and new opportunities.*

One farmer observed that while “the service providers may understand the markets they do not always understand the uniqueness of farmers’ challenges” observing that support needs to be streamlined as it “always comes too late”. Others argued strongly for the continuation of the programme: “The programme is slowly achieving its goal but it must continue to help us to become independent market players. We cannot carry on in the market without the support of the programme”.

Overall, it appears that the MAP programme did not succeed in building a recognisable brand which enabled it to stand out from other smallholder support initiatives provided by the WCDOA, the National Agricultural Marketing Council (NAMC) and commodity groups which suggests that smallholder and marketer responses may not always be MAP programme specific. Some producers appeared to find it difficult to separate out MAP programme activities from support services and training provided under the auspices of farmers support and development programmes which created problems for attribution with respect to survey responses.

## 7 CONCLUSIONS AND RECOMMENDATIONS

### 7.1 CONCLUSIONS

The prerequisite of market readiness would require a stronger focus if the programme is to be extended. There was also a need to improve the branding of MAP as they are still many people who are unaware of the programme both in the Western Cape and in other provinces. This (market design) was not part of the service provider’s brief and had not been picked up sufficiently by the Department in the design.

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<sup>3</sup> A full range of comments to each survey question are available in the WCDOA farm survey tables which accompanies this report.

The programme needs to pay closer attention to the veterinary certification for livestock producers and this means an improved monitoring mechanism. There has been some scepticism about the value of the overseas trip for producers who in many instances were not market ready. There is a need to have more rigorous selection criteria to ensure that only market ready producers were selected, as others would not benefit practically from this exposure. The programme also did not have any mechanism wherein the farmers who went on overseas trips should take on responsibility for mentoring other farmers, who did not have that opportunity. MAP must continue to enable producers to have an improved understanding of both domestic and export markets and their respective compliance requirements and regulatory frameworks.

Ensuring the right design for MAP is crucial. There had been an incorrect assumption that every year a new batch of farmers would enter and subsequently graduated from the programme which had not been the case. Building trust with farmers takes time and in future there needs to be closer linkages and coordination between the service provider and the extension services. The extension services remained uneven with individual officers having different capacities. The service provider had been introduced to extension officers telephonically rather than face-to-face which had impacted on the quality of the working relationship between them. If the programme is to be extended it would need to consider carefully the distinction between market readiness and market access which has been one of the key lessons of the MAP experience.

Training and capacity building offered under the programme was intended to focus more on factors which would contribute to making producers more ready to access markets. While the international exposure visits were interesting they were costly and it is not clear whether they provided good value for money in terms of the actual market opportunities created and sustained through them. Producers report that the technical advice offered to farmers was often valuable and did play a role in the fruit sector particularly, to assist to deliver better quality produce.

For the programme to be improved there needs to be more emphasis on farmer to farmer linkages as producers often had negative perceptions of service providers as a consequence of past experience. However where service providers are utilised there needed to be mechanisms to ensure longer term engagement as annual contracts in a programme of this nature were inappropriate as continuity and relationship building is essential for programme success.

Overall MAP did not succeed in developing a distinctive programme identity. Many of its activities overlapped with those provided by other actors which have meant that several programme participants have found it difficult to differentiate and evaluate MAP activities, their effectiveness and impact.

In the view of the majority of informants MAP has been an important programme which needs to be continued and strengthened. However this would require that resources were pooled more effectively between different state and non-state actors and the distinction made between market readiness and market access.

## 7.2 RECOMMENDATIONS

The evaluation recommends that if the programme is to be extended, this needs to be preceded more in-depth research conducted into the actual marketing arrangements of small-scale producers and the functioning and cost structure of informal markets which many of them supply. Several producers report that informal markets are more profitable for them as they do not carry onerous compliance requirements.

MAP should proceed on the basis of a more comprehensive profiling of the potential programme participants and the viability of their enterprise potential. From a policy perspective this needs to review the issue of year on year dependence on CASP funding to ensure enterprise survival. The evaluation recommends the design

and implementation of a comprehensive market readiness programme with the full involvement and support of extension personnel augmented by private sector commodity specialists. The service provider did attempt to introduce memorandums of agreement between itself and the programme participants to set out their mutual responsibilities in the delivery of the programme. This approach should be encouraged and consolidated if the programme is to be extended in future.

Any future programme activities will require much closer alignment with CASP and the Recapitalisation and Development Programme operated by the Department of Rural Development and Land Reform as in many instances participating farmers require investment and infrastructure to position them to meet compliance requirements. Several of the properties identified for inclusion in MAP were legacy land reform projects with multiple beneficiaries and long histories of unresolved institutional and benefit sharing problems. If these properties are to be involved in future programmes there will need to be specialist institutional development and legal support provided to address and resolve these issues.

Overall it appears that while market linkages have been made through the market access programme many producers have not been in a position to profitably exploit these linkages and sustain them which will require particular attention in an extended programme. Many of the producers who have achieved compliance with standards and regulations did so before entering the programme or in association with strategic partners. Achieving compliance is challenging and expensive for many producers and makes enormous demands on management capacity and systems. Certification is not a once off process and requires ongoing audits to ensure continued compliance. Several producers have opted for alternative arrangements piggybacking on those who have been able to secure certification. Such options may need to be further explored in future.

The programme needs to be redesigned to ensure the development of much more rigorous farmer selection criteria. It needs to clearly distinguish between activities associated with market readiness and those required for actual access of markets. The programme requires improved branding, coordination and alignment with full participation of extension agents and clarity concerning their roles. The programme requires a longer timeframe but with more in-depth monitoring and evaluation of programme performance built in.

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