



Western Cape
Government

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Agriculture



**Strategic Plan
2025/26 - 2029/30**

Western Cape Department of Agriculture

Strategic Plan for 2025/26 – 2029/30

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Executive Authority Statement

The Western Cape Department of Agriculture's Strategic Plan is not just a standalone initiative, but a carefully crafted roadmap that aligns with the priorities in the National government's draft Medium Term Development Plan. These priorities, including inclusive growth and job creation, reducing poverty and the high cost of living, and building a capable, ethical, and developmental state, form the backbone of our strategic direction.

The Western Cape Department of Agriculture's Strategic Plan is in sync with the Western Cape Government's "Growth for Jobs" plan, which the Provincial Strategic Plan guides. The province has set ambitious goals to achieve by 2035, including an R1 trillion economy, triple its exports, and a 51% increase in research and development investment to foster innovation.

Guided by the Ministerial priorities, which seek to support the agricultural and business sectors, advance food security and nutrition and boost exports.

Our evidence-led governance approach is not just a strategy, but the cornerstone of the Department's Strategic Plan. It prioritises efforts, effectively allocates resources, and ensures that data and sound reasoning back our goals for the next five years, instilling confidence in our stakeholders about the plan's execution and its potential for success.

I extend my heartfelt gratitude to the Head of the Department, Dr Mogale Sebopetsa, and his team for their unwavering dedication and hard work in developing the strategy. Their commitment has been instrumental in shaping our strategic direction. I also want to acknowledge Dr Dirk Troskie commendable role in leading and coordinating the process.

I am confident that the Western Cape Department of Agriculture, under the leadership of Dr Mogale Sebopetsa, is well-equipped to implement the strategy. I wish them all the best in this endeavour and look forward to the positive impact of their work.



Dr IH Meyer

Minister of Agriculture, Economic Development and Tourism

Western Cape Government

Accounting Officer Statement

The Western Cape Department of Agriculture (WCDa) went through a thorough planning process to ascertain the five (5) year Strategic Plan (SP), its link to the Agriculture and Agri-processing Master Plan and operationalise the WCG's Provincial Strategic Plan (PSP) as well as our Constitutional mandate. Agriculture is classified as a concurrent function in South Africa's Constitution and thus, both national and provincial spheres of government have a legislative mandate on agriculture with the result that the priorities of both spheres have to find resonance in the strategy of the WCDa. The agricultural sector is a crucial part of the Western Cape economy and is the most competitive economic driver in rural areas and had been confirmed as such in the Provincial Economic Review and Outlook (PERO) of 2024.

This SP has taken into consideration the achievements of the past five years as well as the evidence derived from the forty (40) external evaluations and our listening engagements with our stakeholders to ensure - our programmes are responsive and therefore, help to build a government that people trust.

Our Provincial Strategic Plan (PSP) 2025-2030 places economic growth and jobs as the apex priority of its strategy, recognising that a thriving economy is the foundation for individual wellbeing, stable households and effective service delivery. The four strategic portfolios – Growth for Jobs, Safety, Educated, Healthy and Caring Society, and Innovation, Culture and Governance — are aligned and interdependent, ensuring that the apex priority is realised and that the government delivers on its promise. The WCDa is critical to the realisation of the apex priority as the agricultural sector is the major contributor to the economy of the Western Cape and is well placed to deliver on the government promise.

In addition, the Minister of Agriculture, Economic Development and Tourism, Dr Ivan Meyer has identified four (4) Ministerial Priorities, namely: Business Support, Agricultural Support, Food Security and Nutrition as well as Market Access. It must be noted that these are not stand-alone priorities, but are integral to the work of the Department, and had been thoroughly mapped in this plan to demonstrate their links to the PSP and the Western Cape's Growth for Jobs Plan.

During the planning process for the next five years, the combined output from the forty external evaluations were very valuable to determine the 'Strengths, Weaknesses, Opportunities and Threats' of the Department and, in combination with a series of freshly developed Theories of Change (TOC), formed the scientifically developed foundation for the Department's actions over the planning period.

Despite these formidable challenges, we face the next five years with a sense of determination and resilience. Guided by the values of the Western Cape Government and the PSP, we are committed to consolidating our achievements, addressing emerging risks and laying the groundwork for agriculture in the Western Cape. In doing so, we reaffirm our unwavering commitment to the prosperity and resilience of the agricultural sector in the Western Cape.

Finally, this SP represents a culmination of our collective efforts, perseverance and strategic foresight. This plan enjoyed evidence derived through forty (40) External

Evaluations and engagements with our stakeholders, **we listened to understand** and therefore our programmes are responsive.

I am proud of what we have achieved in the previous term and I want to convey my deep thanks and appreciation to Team Agriculture (Management and all Staff) for their continued dedication and contribution towards creating HOPE for the citizens of the Western Cape. To our partners and stakeholders, you are simply the BEST, your priorities are our priorities as detailed in the plan - we value and appreciate your collaboration, #ForTheLoveofAgriculture!



DR M SEBOPETSA
HEAD OF DEPARTMENT

29 May 2025
DATE

Official Sign-Off

It is hereby certified that this Strategic Plan:

- Was developed by the management of the Western Cape Department of Agriculture under the guidance of Minister (Dr) Ivan Meyer.
- Considers all the relevant policies, legislation and other mandates for which the Western Cape Department of Agriculture is responsible.
- Accurately reflects the Impact, Outcomes and Outputs which the Western Cape Department of Agriculture will endeavour to achieve over the period 2025/26 to 2029/30.

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ABBREVIATIONS

4 th IR	Fourth Industrial Revolution
AA	Action Area
ACF	Alternative Crops Fund
AET	Agricultural Education and Training
AES	Agricultural Economic Services
AFASA	African Farmers Association of South Africa
AfCFTA	African Continental Free Trade Area
APFYD	Agricultural Partnership for Youth Development
AFS	Annual Financial Statements
AGOA	African Growth Opportunities Act
AgriBEE	Agricultural Black Economic Empowerment
AI	Avian Influenza
AIDS	Acquired Immune Deficiency Syndrome
AIMS	Agricultural Integrated Management System
AIU	Agribusiness Investment Unit
APAP	Agricultural Action Policy Plan
APFYD	Agricultural Partnership for Youth Development
APP	Annual Performance Plan
ARC	Agricultural Research Council
AU	African Union
BAS	Basic Accounting System
BFASA	Black Farmers Association of South Africa
ASD	Agricultural Skills Development
BBBEE	Broad-Based Black Economic Empowerment
BFAP	Bureau for Food and Agricultural Policy Research
BPCP	Black Producers Commercialisation Programme
BRICS	Brazil, Russia, India, China and South Africa
BSE	Bovine Spongiform Encephalosis
BSL	Biosafety Level
CAADP	Comprehensive Africa Agricultural Development Programme
CADIS	Cape Animal Disease Information System
CAMIS	Cape Agricultural Mobile Information System
CARA	Conservation of Agricultural Resources Act
CASIDRA	Cape Agency for Sustainable Integrated Development in Rural Areas
CASP	Comprehensive Agricultural Support Programme
CBD	Central Business District
CBO	Community Based Organisation
CC	Climate Change
CCA	Community Choice Approach
CCC	Confronting Climate Change
CCS	Compulsory Community Service
Cel	Centre for Electronic Innovation
CEO	Chief Executive Officer
CFM	Cape Farm Mapper
CFO	Chief Financial Officer
CITCOM	Central Information Technology Committee
CM	Core Mandate
Constitution	Constitution of the Republic of South Africa (Act 108 of 1996)

CoE	Compensation of Employees
COS	Council of Stakeholders
COSATU	Congress of South African Trade Unions
CPAC	Commodity Project Allocation Committee
CPDS	Comprehensive Producer Development Support
CRDP	Comprehensive Rural Development Programme
CRT	Chemical Residues Testing
DAFF	Department of Agriculture, Forestry and Fisheries
DALRRD	Department of Agriculture, Land Reform and Rural Development
DARD	Department of Agriculture and Rural Development
DCAS	Department of Culture and Sport
DEADP	Department of Environmental Affairs and Development Planning
DEDAT	Department of Economic Development and Tourism
DEFF	Department of Environment, Forestry and Fisheries
DEP	Departmental Evaluation Plan
DHS	Department of Human Settlements
DHSWS	Department of Human Settlements, Water and Sanitation
DJOC	District Joint Operating Committee
DLG	Department of Local Government
DLRC	District Land Reform Committee
DOCS	Department of Community Safety
DoH	Department of Health
DoL	Department of Labour
DPAC	Departmental Project Allocation Committee
DPME	Department of Planning, Monitoring and Evaluation
DPSA	Department of Public Service and Administration
DRDLR	Department of Rural Development and Land Reform
DRM	Disaster Risk Management
DSD	Department of Social Development
DSG	Departmental Strategic Goals
EATI	Elsenburg Agricultural Training Institute
ECSA	Engineering Council of South Africa
ECSP	Economic Competitive Support Package
EEA	Employment Equity Act
EIA	Environmental Impact Assessment
EPA	Economic Partnership Agreement
EPWP	Expanded Public Works Programme
ERMCO	Enterprise Risk Management Committee
ERP	Extension Revitalisation Programme
EU	European Union
EWT	Endangered Wildlife Trust
FAO	Food and Agricultural Organisation of the United Nations
FARE	Future of Agriculture and Rural Economy
FAW	Fall Armyworm
FAWU	Food and Allied Workers Union
FBO	Faith Based Organisation
FBT	Food, Beverages and Tobacco
FEDUSA	Federation of Unions of South Africa
FET	Further Education and Training
FMD	Foot and Mouth Disease
FRKP	Financial Record Keeping Programme

FSD	Farmer Support and Development
FTA	Free Trade Agreement
FWD	Farm Worker Development
GC	Game Changer
GDP	Gross Domestic Product
GHS	General Household Survey
GI	Geographic Indicators
GIS	Geographic Information Systems
GPS	Global Positioning System
GVA	Gross Value Added
ha	Hectare
HAS	Hygiene Assessment System
HCD	Human Capital Development
HCDS	Human Capital Development Strategy
HET	Higher Education and Training
HIV	Human Immunodeficiency Virus
HOD	Head of Department
HR	Human Resources
IAMP	Immovable Asset Management Plan
ICT	Information Communication Technology
IDP	Integrated Development Plan
IFMS	Integrated Financial Management System
IFSS-SA	Integrated Food Security Strategy of South Africa
IGR	Intergovernmental Relations
IGDP	Integrated Growth and Development Plan
IMF	International Monetary Fund
IMI	Independent Meat Inspection
IPAP	Industrial Policy Action Plan
IPCC	Inter-governmental Panel on Climate Change
ISC	Intergovernmental Steering Committee
ISO	International Organisation for Standardisation
IT	Information Technology
JPI	Joint Planning Initiative
LOGIS	Government Procurement System
LORWUA	Lower Olifants River Water Users Association
LREAD	Land Reform Advisory Desk
LM	Limited Mandate
Ltd	Limited
LUPA	Land Use Planning Act
MAP	Market Access Programme
MDG	Millennium Development Goals
MEC	Member of the Executive Council
MERO	Municipal Economic Review and Outlook
MIP	Management Improvement Plan
MOA	Memorandum of Agreement
MOOC	Massive Open Online Course
MOU	Memorandum of Understanding
MTEF	Medium Term Expenditure Framework
MTEC	Medium Term Expenditure Committee
MTSF	Medium Term Strategic Framework
NACTU	National Council of Trade Unions

NAFU	National African Farmers Union of South Africa
NARS	National Abattoir Rating Scheme
NARS	National Agricultural Research System
NDP	National Development Plan Vision 2030
NEMA	National Environment Management Act
NEPAD	New Partnership for Africa's Development
NGO	Non-Governmental Organisation
NGP	New Growth Path
NIP	National Infrastructure Plan
NM	No Mandate
NMMU	Nelson Mandela Metropolitan University
NO	National Outcomes
NPC	National Planning Commission
NQF	National Qualifications Framework
NSDF	National Spatial Development Framework
OD	Organisational Development
OHS	Occupational Health and Safety
OQF	Occupation Qualifications Framework
OSD	Occupational Specific Dispensation
PAPA	Performing Animals Protection Act
PAY	Premier's Advancement of Youth Project
PDA	Provincial Department of Agriculture
PDG	Palmer Development Group
PDI	Previously Disadvantaged Individual
PDMC	Provincial Disaster Management Centres
PDP	Provincial Delivery Plan
PERO	Provincial Economic Review and Outlook
PFMA	Public Finance Management Act (Act 1 of 1999)
PLAS	Proactive Land Acquisition Strategy
PPECB	Perishable Products Export Control Board
PRKP	Production Record Keeping Programme
PSDF	Provincial Spatial Development Framework
PSHB	Polyphaegous Shot Hole Borer
PSG	Provincial Strategic Goal
PSP	Provincial Strategic Plan
PVL	Provincial Veterinary Laboratory
QMS	Quality Management System
RAAVC	Revitalisation of Agriculture and Agri-processing Value Chain
RD	Rural Development
RDC	Rural Development Coordination
RPL	Recognition of Prior Learning
RTD	Research and Technology Development
SACNASP	South African Council for Natural Scientific Professions
SACU	Southern African Customs Union
SADC	Southern African Development Community
SAET	Structured Agricultural Education and Training
SALA	Subdivision of Agricultural Land Act (Act 70 of 1970)
SAMEA	South African Monitoring and Evaluation Association
SANAS	South African National Accreditation System
SAQA	South African Qualifications Authority
SASSA	South African Social Security Agency

SCM	Supply Chain Management
SCOA	Standard Chart of Accounts
SDF	Spatial Development Framework
SDG	Sustainable Development Goals
SEM	Socio-Economic Measurement
SHEP	Smallholder Horticulture Empowerment and Promotion
SIME	Strategic Integrated Municipal Engagements
SIP	Strategic Infrastructure Plan
SIZA	Sustainability Initiative of South Africa
SM	Shared Mandate
SOC	State Owned Company
SOE	State Owned Entity
SOFI	State of Food Insecurity in the World
SONA	State of the Nation Address
SOP	Standard Operating Procedures
SP	Strategic Plan
SPLUMA	Spatial Planning and Land Use Management Act
SPS	Sanitary and Phytosanitary Standards
SRM	Sustainable Resource Management
SWOT	Strengths, Weaknesses, Opportunities and Threats
TAD	Trans-boundary animal diseases
TNA	Training Needs Analysis
TOC	Theory of Change
UAMP	User Asset Management Plan
UN	United Nations
US	University of Stellenbosch
USAAA	Union of South African Agricultural Associations
UTA	Unit for Technical Assistance
UWC	University of the Western Cape
VIP	Vision Inspired Priority
VOIP	Voice Over Internet Protocol
VPH	Veterinary Public Health
VPN	Veterinary Procedure Notices
VS	Veterinary Services
WCAPAP	Western Cape Response to the Agricultural Policy Action Plan
WCARF	Western Cape Agricultural Research Forum
WCDoA	Western Cape Department of Agriculture
WCED	Western Cape Department of Education
WCG	Western Cape Government
WCPVL	Western Cape Provincial Veterinary Laboratory
WEF	World Economic Forum
WIETA	Wine and Agricultural Ethical Trade Association
WOAH	World Organisation for Animal Health
YPP	Young Professionals Programme

Part A: Our Mandate

1. Constitutional mandate

The Western Cape Department of Agriculture (WCDoA) derives its mandate from the Constitution of the Republic of South Africa¹. Section 40 of the Constitution constitutes government at the national, provincial and local spheres. It also argues that government at these levels should be distinctive, interdependent and interrelated.

It is important to note that Section 41 (1) starts to regulate the relationship between the three spheres of government that were created. More specifically, it rules that all spheres of government must:

- a) Secure the well-being of the people of the Republic (Article 41 (b)).
- b) Respect the constitutional status, institutions, powers and functions of government in other spheres (Article 41 (e)).
- c) Not assume any power or function except those conferred on them in terms of the Constitution (Article 41 (f)).
- d) Exercise their powers and performs their functions in a manner that does not encroach on the geographical, functional or institutional integrity of government of another sphere (Article 41 (g)).

It follows that the principle embedded in the Constitution is that three spheres of government are established and that each are awarded certain powers and responsibilities. Furthermore, the one sphere is not a subsidiary of any other and for this reason the reference to a multi-sphere government in the introduction. Section 41 (2) of the Constitution rules that an Act of Parliament must eventually be passed to regulate the relationship between these three spheres of Government. From this perspective the Intergovernmental Relations Framework Act² was born. In essence this Act, commonly known as the IGR Act, makes provision for a number of platforms where functional and coordination issues can be discussed between the various spheres of Government.

Article 104 (1) (b) of the Constitution conveys the power to provinces to pass legislation regarding any matter with a functional area listed in Schedules 4 and 5 of the Constitution (see Table 1). In the case of certain issues, legislative powers are awarded to more than one sphere of government; - the so-called concurrent functions.

Table 1: Constitutional allocation of agriculturally related functional areas between the three levels of Government.

REFERENCE	NATIONAL	PROVINCIAL	LOCAL
Schedule 4; Part A: Concurrent national and provincial functional area.	Agriculture	Agriculture	
	Animal control & diseases	Animal control & diseases	
	Casinos, racing, gambling, etc.	Casinos, racing, gambling, etc.	
	Consumer protection	Consumer protection	
	Disaster management	Disaster management	
	Environment	Environment	
	Nature conservation, excluding national parks, etc.	Nature conservation, excluding national parks, etc.	
	Public transport	Public transport	
	Public works	Public works	
	Regional planning and development	Regional planning and development	

¹Act 108 (1996) The Constitution of the Republic of South Africa, 1996. Government Printers, Pretoria

²Act 13 (2005) Intergovernmental Relations Framework Act, 2005. Government Printers, Pretoria

REFERENCE	NATIONAL	PROVINCIAL	LOCAL
	Soil conservation	Soil conservation	
	Tourism	Tourism	
	Trade	Trade	
	Urban and rural development	Urban and rural development	
Schedule 4; Part B: National & Provincial Government regulate Municipal implementation.	Firefighting services	Firefighting services	Firefighting services
	Local tourism	Local tourism	Local tourism
	Municipal planning	Municipal planning	Municipal planning
	Municipal public transport	Municipal public transport	Municipal public transport
	Trading regulations	Trading regulations	Trading regulations
	Potable water systems	Potable water systems	Potable water systems
Schedule 5; Part A: Exclusive Provincial Competence.		Abattoirs	
		Liquor licenses	
		Provincial planning	
		Provincial roads and traffic	
		Veterinary services	
Schedule 5; Part B: Province regulate and monitor Municipal implementation		Fencing and fences	Fencing and fences
		Control of liquor sales	Control of liquor sales
		Licence & Control of places that sells food to public	Licence & Control of places that sells food to public
		Markets	Markets
		Municipal abattoirs	Municipal abattoirs
		Street trading	Street trading

Source: Constitution of South Africa³

It is clear from this Table that the Constitution of our country very specifically provides the mandate for specific economic functions to Provinces. Without impeding on the importance of the other matters listed, specific reference can be made to the concurrent functions of agriculture, regional planning as well as urban and rural development. For some or other reason abattoirs and veterinary services are exclusive provincial competencies, leading to some interesting developments regarding international trade in animals and animal products. The importing country usually requires a certificate from a state veterinarian before animals or animal products are allowed into the country. Although the regulation of international trade and standards are usually seen as the prerogative of the national sphere of government, this ruling in the Constitution leads to the situation that veterinary export certificates are issued by the provincial sphere of government in South Africa.

Also important is the fact that, according to the Constitution, Provincial Planning is an exclusive Provincial function. It follows that the Constitution conveys the responsibility to provinces to execute these predominantly economic functions in a way that will be to the benefit of the citizens of the province and the country. This, in turn, cannot be done in a policy vacuum.

Even though the Constitution of the Republic of South Africa makes specific rulings on the distribution of responsibilities between various levels of government, the Constitution still leaves a lot of room for interpretation. For instance, how should "Agriculture", a "functional area(s) of concurrent national and provincial legislative competence" be supported? For this reason the (then) Public Service Commission was tasked in 1994 to provide a more detailed breakdown of the Agricultural responsibilities between the Provincial and National spheres of Government. Their recommendations are presented in Table 2.

³Act 108 (1996) The Constitution of the Republic of South Africa, 1996. Government Printers, Pretoria

Table 2: Division of agricultural functions between the national and provincial spheres of competence.

NATIONAL	PROVINCIAL
<p>Determination of norms and standards. <i>Plant improvement.</i> <i>Livestock improvement.</i> <i>Subdivision of agricultural land.</i> <i>Agricultural resource conservation.</i> <i>Utilisation of agricultural resources.</i> <i>Agricultural credit and financial assistance.</i></p> <p>Regulation of: <i>Animal health.</i> <i>Plant health.</i> <i>Agricultural marketing.</i> <i>Combating of agricultural pests.</i> <i>Co-operatives.</i> <i>Quality of plant and animal material and products.</i> <i>Veterinary public health.</i> <i>Livestock brands.</i></p> <p>Determination of macro agricultural policy.</p> <p>Control of: <i>Import and export of animals, agricultural material and products.</i> <i>Agricultural and stock remedies, stock feeds and fertilisers.</i></p> <p>Rendering of: <i>Specialised diagnostic and research services regarding animal diseases.</i> <i>Agricultural statistical services.</i> <i>Financial assistance in national disaster situations.</i></p> <p>Maintenance of international agricultural relations.</p> <p>Promotion of agricultural research, technology development and transfer.</p> <p>Production of vaccines and other animal health products.</p>	<p>Rendering of support to farmers and agricultural communities regarding: <i>Extension services.</i> <i>Training.</i> <i>Financing.</i> <i>Household food security.</i> <i>Disaster aid.</i> <i>Agricultural economics.</i> <i>Agricultural engineering technology.</i> <i>Marketing infrastructure.</i> <i>Irrigation.</i> <i>Stock-watering systems.</i></p> <p>Promotion of: <i>Agricultural resource conservation.</i> <i>Sustainable utilisation of agricultural resources.</i></p> <p><i>Agricultural technology development, adaptation and transfer.</i> <i>Improvement of livestock, plants and related products.</i> <i>Agricultural marketing.</i></p> <p>Rendering of: <i>Animal health services.</i> <i>Veterinary public health services.</i> <i>Plant health services.</i> <i>Agricultural statistical services.</i> <i>Veterinary laboratory services.</i></p> <p>Determination of agricultural economic policy.</p> <p>Administration of matters pertaining to state agricultural land. Combating of agricultural pests. Regulation of abattoirs and subdivision of agricultural land.</p> <p>Registration of livestock brands.</p>

Source: PSC (1994)⁴

No overview of the Constitutional mandate of the Department can be complete without referring to the Bill of Rights (Chapter 2) and the responsibility it conveys onto officials. Of most relevance to the Department is rights such as fair labour relations (employers and employees) (Article 23), protected environment (Article 24), property ownership (Article 25), food and water (Article 27) and just administrative action (Article 33).

Finally, the Constitution of the Western Cape, Act 1 of 1998, also guides the policies strategies and activities of the Department.

⁴PSC (1994) Proposals for the Restructuring and Departmentalisation of the Public Service. Public Service Commission, Pretoria

2. Legislative and policy mandates

National legislation:

- Adult Basic Education and Training Act, 2000 (Act 52 of 2000)
- Agricultural Product Standards Act, 1990 (Act 119 of 1990)
- Agricultural Produce Agents Act, 1992 (Act 12 of 1992)
- Animal Diseases Act, 1984 (Act 35 of 1984)
- Animal Health Act, 2002 (Act 7 of 2002)
- Animal Identification Act, 2002 (Act 6 of 2002)
- Animals Protection Act, 1962 (Act 71 of 1962)
- Basic Conditions of Employment Act, 1997 (Act 75 of 1997)
- Broad Based Black Economic Empowerment Act, 2003 (Act 53 of 2003)
- Companies Act, 2008 (Act 71 of 2008)
- Compensation for Occupational Injuries and Diseases Act, 1993 (Act 130 of 1993)
- Conservation of Agricultural Resources Act, 1983 (Act 43 of 1983)
- Consumer Protection Act, 2008 (Act 68 of 2008)
- Cooperatives Act, 2005 (Act 14 of 2005)
- Disaster Management Act No. 57 of 2002
- Employment Equity Act (Act 55 of 1998)
- Employment of Educators Act, 1998 (Act 76 of 1998)
- Extension of Security of Tenure Act, 1997 (Act 62 of 1997)
- Fertilizers, Farm Feeds, Agricultural Remedies and Stock Remedies Act, 1947 (Act 36 of 1947)
- Foodstuffs, Cosmetics and Disinfectants Act, 1972 (Act 54 of 1972)
- Further Education and Training Act, 1998 (Act 98 of 1998)
- General and Further Education and Training Quality Assurance Act (Act 58 of 2001)
- Geomatics Profession Act (Act 19 of 2013)
- Government Employees Pension Law, 1996 (proclamation 21 of 1996)
- Government Immovable Asset Management Act, 2007 (Act 19 of 2007)
- Higher Education Act, 1997 (Act 101 of 1997)
- Income Tax Act, 1962 (Act 58 of 1962)
- Labour Relations Act, 1995 (Act 66 of 1995)
- Land Reform (Labour Tenants) Act, 1996 (Act 3 of 1996)
- Liquor Products Act (Act 60 of 1989)
- Marketing of Agricultural Products Act, 1996 (Act 47 of 1996)
- Meat Safety Act, 2000 (Act 40 of 2000)
- Medicines and Related Substances Control Act, 1965 (Act 101 of 1965)
- Merchandise Marks Act, 1941 (Act, 17 of 1941)
- National Archives Act, 1996 (Act 43 of 1996)
- National Education Policy Act, 1996 (Act 27 of 1996)
- National Environmental Management: Waste Act, 2008 (Act 56 of 2008)
- Natural Scientific Professions Act, 2003 (Act 27 of 2003)
- National Water Act, 1998 (Act 36 of 1998).
- Non-Proliferation of Weapons of Mass Destruction Act, 1993 (Act No. 87 of 1993)
- Occupational Health and Safety Act, 85 (Act 85 of 1993)
- Performing Animals Protection Amendment Act, 1935 (Act 24 of 1935)
- Preferential Procurement Policy Framework Act, 200 (Act 5 of 2000)
- Prevention of Illegal Eviction from and Unlawful Occupation of Land Act, 1998 (Act 19 of 1998)
- Promotion of Access to Information Act, 2000 (Act 2 of 2000)
- Promotion of Administrative Justice Act, 2000 (Act 3 of 2000)
- Protection of Personal Information Act, 2013 (Act 4 of 2013)
- Public Administration Management Act, 2014 (Act 11 of 2014)
- Public Finance Management Act, 1999 (Act 1 of 1999)
- Public Holidays Act, 1994 (Act 36 of 1994)
- Public Service Act, 1994 (Proclamation 103 of 1994))
- Skills Development Act, 1998 (Act 97 of 1998)
- Skills Development Levies Act, 1999 (Act 9 of 1999)

- South African Qualifications Act, 1995 (Act 58 of 1995)
- Spatial Data Infrastructure Act, 2003 (Act 54 of 2003)
- Spatial Planning and Land Use Management Act, 2013 (Act 16 of 2013)
- Subdivision of Agricultural Land Act, 1970 (Act 70 of 1970)
- Trade Marks Act, 1993 (Act 194 of 1993)
- Veterinary and Para-Veterinary Professions Act, 1982 (Act 19 of 1982)
- Waste Act, 2008 (Act 59 of 2008)
- Water Act, 1998 (Act 36 of 1998)
- Water Services Act, 1997 (Act 108 of 1997)

Provincial legislation:

- Western Cape Appropriation Act (Annually)
- Western Cape Direct Charges Act, 200 (Act 6 of 2000)
- Western Cape Land Use Planning Act, 2014 (Act 3 of 2014)

International policy mandates:

- Africa Union Agenda 2063
- Aquatic Animal Health Code of the World Health Organisation
- Codex Alimentarius
- International Code for Laboratory Diagnostic Procedure
- International Labour Organisation: Geneva June 2019 'Convention Concerning the Elimination of Violence and Harassment in the World of Work'
- International Sanitary and Phytosanitary Code
- International Sanitary and Phytosanitary Code of the World Trade Organisation
- Manual of Diagnostic Tests and Vaccines for Terrestrial Animals (Terrestrial Manual)
- Manual of Diagnostic Tests for Aquatic Animals (Aquatic Manual)
- SADC Industrialization Strategy and Roadmap: 2015 - 2063
- Sustainable Development Goals (SDG)
- Terrestrial Animal Health Code,
- The Comprehensive Africa Agricultural Development Programme (CAADP)

National policy mandates:

- Agricultural Policy Action Plan (APAP)
- Animal Welfare Strategy of DAFF (2014)
- Black Producers Commercialisation Programme (BPCP)
- Comprehensive Agricultural Support Programme (CASP)
- Comprehensive Rural Development Programme (CRDP)
- Comprehensive Producer Development Support policy
- Compulsory Community Service for veterinarians
- Council for Trades and Occupations (QCTO)
- DRDLR: Rural Development Framework (2013)
- Extension Revitalisation Programme (ERP)
- Extension and Advisory Services Policy
- Expanded Public Works Programme (EPWP)
- The National Policy on Food and Nutrition Security for the Republic of South Africa
- Fetsa Tlala Programme
- Further Education and Training Framework
- Game Regulations
- Governance and Financing Framework for ATIs of South Africa
- Graduate Placement Programme
- Higher Education Policy Framework
- The Higher Education Qualifications Framework
- Ilima/Letsema Programme
- Independent Meat Inspection
- Industrial Policy Action Plan (IPAP)
- Integrated Food Security and Nutrition Programme

- Integrated Food Security Strategy of South Africa
- Integrated Growth and Development Plan (IGDP)
- Medium Term Strategic Framework
- National Abattoir Rating Scheme
- National Agricultural Research and Development Strategy
- National Articulation Framework for Agricultural training programmes
- National Development Plan 2030 (NDP)
- National Education and Training Strategy for Agriculture, Forestry and Fisheries (2015)
- National Infrastructure Plan (NIP)
- National Mentorship Framework for the Agricultural Sector
- National Programme of Action with its 14 National Objectives (NO)
- National Qualifications Framework (NQF)
- National Skills Development Plan 2030
- National Skills Development Policy
- National Strategic Plan for HIV and AIDS
- Norms and Standards for Agricultural Extension
- Norms and Standards for Agricultural Training Institutes of South Africa
- Norms and Standards for Educators
- Occupations Qualifications Framework (OQF)
- Primary Animal Health Care Policy of DAFF
- Proactive Land Acquisition Strategy (PLAS)
- Quality Council on Trades and Occupations
- Revitalisation of the Agriculture and Agri-processing Value Chain (RAAVC)
- Settlement Implementation Strategy
- South African Qualifications Authority (SAQA)
- Strategic Infrastructure Projects (SIP) flowing from the NDP
- Veterinary Procedure Notices (VPN)

Provincial policy mandates:

- OneCape 2040 Provincial Spatial Development Strategy
- Provincial Delivery Plan (PDP)
- Provincial Strategic Plan (PSP)
- Integrated Development Plans of Local Government
- Priorities identified during the annual Joint Planning Initiative (JPI) with municipalities
- Priorities identified during the annual Strategic Integrated Municipal Engagement (SIME)
- Provincial Spatial Development Strategy
- Western Cape Agricultural Sector Climate Change Framework and Implementation Plan (SmartAgri) (2016)
- Western Cape Green Economy Strategy Framework
- Western Cape Climate Change Response Strategy (2014)
- Western Cape Response to the Agricultural Policy Action Plan (WCAPAP)

3. Institutional Policies and Strategies over the five-year planning period

On 29 May 2024, South Africa held its 7th democratic election at national and provincial level and the election manifesto of the new government was to be translated into the plan of action of the organs of state at all spheres. It was argued in Section 1 that agriculture has been classified as a concurrent function in South Africa's Constitution. Thus, both national and provincial spheres of government have a legislative mandate on agriculture with the result that the manifesto of both spheres has to find resonance in the strategy of the WCDoA. Furthermore, agriculture is a crucial part of the economy in most rural areas. Indeed, it was found in the Provincial Economic Review and Outlook (PERO)⁵ of 2015 that agriculture is the most competitive economic sector in all five of the district municipalities of the Western Cape. Furthermore, tourism, with very strong linkages to

⁵PERO (2015) Provincial Economic Review and Outlook 2015. Provincial Treasury, Western Cape Government, Cape Town.

agriculture, is the second most competitive sector in all district municipalities. It follows that the WCDoA cannot develop a strategy without taking notice of strategies and priorities at the level of local government. Even at the international level bodies such as the United Nations (UN) and the African Union (AU) have identified agriculture as a vehicle towards achieving global priorities.

However, it must be recognised that the contribution of the Western Cape Agricultural Sector to the achievement of various policies and strategies is bounded by the 'envelope of the possible'. In other words, the natural (land, water and climate) and human (e.g. skills, demography, education, knowledge, managerial) resources as well as the economic structure of the economy (e.g. markets, technology, production capacity, and capital) determine the products which can be produced as well as the farming systems to be followed. At the same time, numerous factors could prevent the Agricultural Sector of the Province from achieving its objectives. Alternatively, in other words, these are the risks, which will prevent implementation. Indeed, according to the Global Risks Report 2025 of the World Economic Forum (WEF), six of the top ten risks with the highest likelihood of occurring and seven of the top ten risks in terms of impact have a direct influence on farming. All these elements will be discussed in Section 8.1 of this Strategic Plan (SP).

For this reason, the policies and strategies of the WCDoA has to take cognisance of developments in all these spheres of government and translate those priorities and strategies into its own strategies. Hence, the rest of Section 3 (Institutional policies and strategies over the five-year planning period) will be dedicated to exploring policies and strategies from international level down to local level. However, it is not sufficient to merely list these policies and strategies, it must also take the next step and identify synergies and key messages for the Department to include in its own strategy. The 'envelope of the possible' as well as the risk environment will receive attention in Section 8.1 (external environment analysis).

3.1. International strategies

At the beginning of the 21st Century, world leaders accepted a global vision to fight poverty. This vision was subsequently translated into eight Millennium Development Goals (MDG) and specific targets were set to be achieved by 2015. It follows that these goals provided the overarching development framework at a global level for the next 15 years. At the end of this period, the achievement of these MDGs were evaluated and it was the concerted effort from various spheres of government that resulted in the lives of millions saved and the conditions of many more being improved. It was further found that, with targeted interventions, sound strategies, adequate resources and political will, even the poorest countries can make dramatic and unprecedented progress. However, it was also acknowledged that uneven achievements and shortfalls occurred in many areas. It was concluded that the work is not complete and that it must continue with new goals and targets in the next era (UN, 2015)⁶.

The result was that a new set of goals, the Sustainable Development Goals (SDG) was approved by the General Assembly of the United Nations during September 2015. The SDGs consists of 17 goals and 169 targets to be reached by 2030 (UN, 2015b)⁷. In order to measure progress with achievement of the SDGs and its targets, 230 indicators were subsequently developed (UN, 2016)⁸. The SDGs as well as the number of targets and indicators relevant to the Western Cape Department of Agriculture can be found in Table 3.

⁶UN (2015) The Millennium Development Goals Report: 2015). United Nations, New York

⁷UN (2015b) Transforming our world: the 2030 Agenda for Sustainable Development. Adopted at the 69th Session of the General Assembly of the United Nations, New York.

⁸UN (2016) Final list of proposed Sustainable Development Goal Indicators: Report of the Inter-Agency and Expert Group on Sustainable Development Goal Indicators. UN, New York.

Table 3: The seventeen Sustainable Development Goals and the number of targets and indicators relevant to Western Cape Agriculture.

STRATEGIC DEVELOPMENT INDICATORS		NUMBER	
NR	TITLE	TARGET	INDICATOR
1	End poverty in all its forms everywhere.	2	3
2	End hunger, achieve food security and improved nutrition, and promote sustainable agriculture.	7	12
3	Ensure healthy lives and promote wellbeing for all at all ages.	1	1
4	Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.	3	3
5	Achieve gender equality and empower all women and girls.	3	3
6	Ensure availability and sustainable management of water and sanitation for all.	4	5
7	Ensure access to affordable, reliable, sustainable and modern energy for all.	2	2
8	Promote sustained, inclusive and sustainable economic growth, full and productive employment, and decent work for all.	3	4
9	Build resilient infrastructure, promote inclusive and sustainable industrialisation, and foster innovation.	2	2
10	Reduce inequality within and among countries.	1	1
11	Make cities and human settlements inclusive, safe, resilient and sustainable.	1	1
12	Ensure sustainable consumption and production patterns.	2	2
13	Take urgent action to combat climate change and its impacts (taking note of agreements made by the UNFCCC forum).	2	2
14	Conserve and sustainably use the oceans, seas and marine resources for sustainable development.	1	1
15	Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification and halt and reverse land degradation, and halt biodiversity loss.	1	1
16	Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels.	4	5
17	Strengthen the means of implementation and revitalise the global partnership for sustainable development.	1	1

Source: Calculated from UN (2016)

This relevance is not always positive for the Agricultural Sector but may have negative implications. Nevertheless, it is important to internalise the SDGs, its targets and indicators. Still, it is important to note that there is not one SDG with no relevance to the Western Cape. All has some form of relevance and more information is available upon request. However, it is clear that SDG 2: End hunger, achieve food security and improved nutrition, and promote sustainable agriculture is the most significant of all for the Agricultural Sector in the Western Cape.

In the Food Security Report of the Food and Agricultural Organisation of the UN (FAO, 2024)⁹ it is reported that the world is still far off track to achieve SDG 2 with the global prevalence of undernourishment persisting at nearly the same level for three consecutive years after having risen sharply in the wake of the COVID-19 pandemic. Between 713 and 757 million people may have faced hunger in 2023 – one out of 11 people in the world and one out of every five in Africa. Hunger is still on the rise in Africa, but it has remained relatively unchanged in Asia, while notable progress has been made in the Latin American and Caribbean region.

⁹FAO (2024) The State of Food Security and Nutrition in the World 2024. Financing to end hunger, food insecurity and malnutrition in all its forms. Food and Agricultural Organisation of the United Nations, Rome.

Progress towards the broader goal of ensuring regular access to adequate food for all has also stalled with an estimated 28,9 percent of the global population (2,33 billion people) moderately or severely food insecure. More than one third of people in the world (about 2,8 billion) could not afford a healthy diet in 2022. The lack of improvement in food security and the uneven progress in the economic access to healthy diets cast a shadow over the possibility of achieving Zero Hunger in the world, six years away from the 2030 deadline. It is projected that 582 million people will be chronically undernourished at the end of the decade, more than half of them in Africa.

According to the FAO (2024) report South Africa has regressed in the majority of SDG 2 indicators:

- a) Prevalence of undernourishment in the total population: From 3,4% in 2004-06 to 8,1% in 2021-23.
- b) Prevalence of stunting in children (<5 years): From 22,5% in 2012 to 22,8% in 2022.
- c) Prevalence of overweight in children (<5 years): From 13,1% in 2012 to 12,1% in 2022.
- d) Prevalence of obesity in the adult population: From 28,6% in 2012 to 30,8% in 2022.
- e) Prevalence of anaemia in women (15-49 years): 28,6% in 2012 to 30,5% in 2019.
- f) Prevalence of low birth weight: remained constant at 16,6% in both 2012 and 2022.

In terms of achievement of SDGs in general, StatsSA (2023)¹⁰ provides insight into progress made by the country at the halfway mark of the 2030 Agenda. Positive trends have been observed in 33% of the targets, 23% have seen no noticeable change in the data, with 11% of targets showing no progress. Furthermore, 33% of the SDG targets did not have sufficient or new data for tracking progress.

At the 21st Ordinary Session of the Assembly of Heads of State and Government of the African Union (AU) on 26 May 2013, a decision was taken that an agenda for a growth trajectory for Africa over the next 50 years should be developed. This agenda, termed 'Agenda 2063', was released in April 2015. It consists of seven aspirations (see Table 4), 20 goals and 15 flagship projects (AU, 2015)¹¹.

Table 4: The seven aspirations expressed in Agenda 2063.

NR	TITLE
1	A prosperous Africa based on inclusive growth and sustainable development.
2	An integrated continent, politically united and based on the ideals of Pan-Africanism and the vision of Africa's Renaissance.
3	An Africa of good governance, democracy, respect for human rights, justice and the rule of law.
4	A peaceful and secure Africa.
5	An Africa with a strong cultural identity, common heritage, shared values and ethics.
6	An Africa whose development is people-driven, relying on the potential of African people, especially its women and youth, and caring for children.
7	Africa as a strong, united and influential global player and partner.

For the purpose of the WCDoA, the following goals are of particular relevance:

- a) Goal 3: Healthy and Well-Nourished Citizens.
- b) Goal 4: Transformed Economies and Job Creation.
- c) Goal 5: Modern Agriculture for Increased Productivity and Production.
- d) Goal 7: Environmentally Sustainable Climate Resilient Economies and Communities.

Of the AU Flagship Projects the African Continental Free Trade Area (AfCFTA) is probably the most important from an agricultural perspective. For this reason, it is also positive that real progress was made with tariff reduction, but it is of concern that a long road is still ahead in the areas of harmonisation of rules and standards as well as in the field of border measures.

¹⁰ StatsSA (2023) Sustainable Development Goals Country Report 2023 South Africa. Stats SA, Pretoria

¹¹ AU (2015) Agenda 2063: The Africa We Want. Final Edition, April 2015, African Union Commission

In the Second Continental Progress Report (AU 2022)¹² reports from 38 of the 55 AU member countries were consolidated and progress against 2021 targets were measured. At an aspirational level best progress were made with aspiration 2 with a score of 84%. This high score was mainly due to the signature and ratification of the AfCFTA which came into effect on 1 January 2021. The second highest scoring aspiration was aspiration 6 (67%) with a slight increase in the proportion of women in the agricultural population who have ownership or secure rights over agricultural land, as well the proportion of seats held by women in national parliaments, regional and local bodies. Progress was also recorded with aspiration 4 (63%) with member states indicating a significant decline in the number of deaths emanating from armed conflict and from religious and ethnic disagreement and intolerance. Aspiration 7 achieved an overall commendable performance of 58% evidenced by the proportion of public sector budget funded by national capital markets as well as the proportion of official development assistance (ODA) in national budgets. Aspiration 5 has shown moderate progress (45%) largely due to the weak integration of indigenous African culture, values and language into primary and secondary school curricula. Aspiration 3 received an overall weak performance score (42%) mainly due to low scores for capable institutions and transformed leadership at all levels. Nevertheless, most Member States had a satisfactory performance. Finally, Aspiration 1 received the lowest score (37%) which can be attributed mainly to a decrease in GDP per capita from \$3 170 in 2019 to \$2 910 in 2021 and high employment rates.

In terms of the goals mentioned above, progress were measured as follows:

- a) Goal 3: Up from 25% in 2019 to 44% in 2021.
- b) Goal 4: Up from 13% in 2019 to 17% in 2021.
- c) Goal 5: No data in 2019, but indicator of 58% in 2021.
- d) Goal 7: Up from 28% in 2019 to 64% in 2021.

Even before Agenda 2063 was agreed upon, it was clear that agriculture has a very important role to play. The Comprehensive Africa Agriculture Development Programme (CAADP) is the New Partnership for Africa's Development (NEPAD) framework for developing the agricultural sector in Africa. It was endorsed by Heads of State and government, in June 2003, Maputo, Mozambique. In this "Maputo Declaration", the Heads of State agreed to allocate at least 10% of their national budget to Agricultural Sector development; achieve at least 6% annual growth in the agricultural sector and develop an Implementation Compact (AU, 2003)¹³.

In the Malabo Declaration of 2014, the African Heads of State recommitted themselves to the principles and values of CAADP. It went further by committing¹⁴ to enhance investment finance in agriculture, to end hunger in Africa by 2025 and to halve poverty by 2015. To this end, agricultural growth is to be accelerated by doubling agricultural productivity, sustain annual agricultural GDP growth of at least 6%, and strengthen public-private partnerships and to create job opportunities in agricultural value chains (AU, 2014)¹⁵. The seven Malabo commitment areas are:

- a) Commitment to CAADP Process.
- b) Investment finance in Agriculture
- c) Ending hunger
- d) Eradicating poverty through agriculture
- e) Intra-African trade in agricultural commodities and services
- f) Resilience to climate variability

¹²AU (2022) Second Continental Report on the Implementation of Agenda 2063. African Union, Midrand, South Africa.

¹³AU (2003) Decisions and Declarations. Assembly of the African Union, Second Ordinary Session, 10 – 12 July 2003, Maputo, Mozambique. African Union Commission

¹⁴In 2018 during the Addis Ababa, (Ethiopia) Permanent Secretaries' Leadership Retreat. The leadership committed to provide effective leadership for the attainment of specific goals by the year 2025, including ending hunger and services, tripling intra- African trade, enhancing resilience of livelihoods and production systems, and ensuring that agriculture contributes significantly to poverty reduction.

¹⁵AU (2014) Malabo declaration on accelerate agricultural growth and transformation for shared prosperity and improved livelihoods. Assembly of the African Union, 23rd Ordinary Session, 26 – 27 June 2014, Malabo, Equatorial Guinea. African Union Commission.

g) Mutual accountability for actions and results

Indeed, emeritus Professor John W. Mellor, from Cornell University in the USA, indicates that a 6% growth in African agricultural production will lead to a 6,4% overall economic growth rate, 8% growth rate in the urban economic sectors and a 68% faster growth in employment¹⁶.

For the fourth (2023) CAADP Biennial Review Report¹⁷, 49 out of 55 Member States submitted their validated national reports to the African Union Commission (AUC) through their respective Regional Economic Communities (RECs). It was found that, overall, the continent remains not-on-track in achieving the Malabo Declaration Commitments, obtaining an overall average score of 4,56 with the benchmark of 9,29 required to be on-track in this reporting period. It was also found that no individual member state is on-track to achieve the Malabo target for 2025. Nevertheless, Rwanda achieved the best overall score (8,07 out of 10), followed by Morocco (6,99 out of 10) and Egypt (6,83 out of 10).

South Africa received a score of 4,11 out of 10 and, unfortunately, it was not on track to meet any of the 7 Malabo commitment areas. Nevertheless, the following five key areas of strong performance were identified:

- a) 84,5 as index of capacity to generate and use agricultural statistical data and information.
- b) 46,5% of farm, pastoral and fisher households are resilient to climate and weather related shocks.
- c) 5 out of 5 for agricultural commodity value chains for which a PPP is established with strong linkage to smallholder agriculture.
- d) 100% response to spending needs on social protection for vulnerable social groups, from the government budget.
- e) 1,0% of total agricultural research spending as a share of agricultural GDP.

The worst performing areas for South Africa were:

- a) 12,1% of farmers having access to agricultural advisory services.
- b) 7,6% of youth engaged in new job opportunities in agricultural value chains.
- c) 2,3% annual growth of the agriculture value added.
- d) 40,7 out of 100 trade facilitation index.
- e) 66,3% for the quality of multi-sectorial and multi-stakeholder coordination.

Finally, it was recommended that South Africa should:

- a) Develop mechanisms to improve investment finance in agriculture by focusing on access of farmers to finance and advisory services, increasing domestic private sector investment in agriculture as well as foreign private sector investment in agriculture.
- b) Enhance its intra-Africa Trade in agriculture by focusing on trade facilitation and identifying critical commodities to prioritise in trade.
- c) Improve its commitment to CAADP process by enhancing the quality of multi-sectorial and multi-stakeholder coordination.

The Malabo Declaration is set to run its course by 2025 and it is expected to be replaced by the Kampala Declaration. This Declaration is to be issued after a meeting of African Heads of State in Uganda from 9 – 10 January 2025 and will cover the period up to 2035. It is anticipated that the following six priorities will be highlighted in the Kampala Declaration¹⁸:

- a) Intensifying sustainable food production, agro-industries and trade.
- b) Investment and financing for accelerated agri-food systems transformation.

¹⁶Mellor JW (2017) Agricultural development and economic transformation: Promoting Growth with Poverty Reduction. Palgrave studies in Agricultural Economics and Food Policy. Palgrave Macmillan

¹⁷CAADP (2024) The 4th CAADP Biennial Review Report 2015 – 2023. Report to the AU Assembly on Implementing the June 2014 CAADP Malabo Declaration. Addis Ababa, Ethiopia.

¹⁸Sacko (2024) Comments made by AU Commissioner Josefa Leonel Correia Sacko (Agriculture, Rural Development, Blue Economy and Sustainable Environment (ARBE)) at the 11th Conference of the African Network of African Policy Research Institutes held from 26 to 28 November 2024 in Dakar, Senegal.

- c) Ensuring food security and nutrition.
- d) Advancing industry and equitable livelihoods.
- e) Building resilient agri-food systems.
- f) Strengthening agri-food systems governance.

It is interesting that, at the same Conference, the emerging buzzword was “agri-food systems” with the whole chain from field to fork being covered. In the process emphasis will be placed not only on primary production, but also on nutrition and the identification of certain diagnostic indicators throughout the agri-food system. It follows that the much flaunted 10% to be spent on agriculture will not only focus on primary agriculture anymore, but on the whole food system, including value chain infrastructure and nutrition. This emphasis on the agri-food systems goes straight against the exclusive emphasis placed on soil health and soil nutrition, as being the main policy focus for African Agriculture, as proposed in the Africa Fertilizer and Soil Health Action Plan (AFSH-AP). An interesting debate and powerplay is in the offering.

During the ANAPRI Conference it was indicated that, despite all the challenges, CAADP has shown progress. However, warnings against policy reversal were expressed and some signs of such were identified. These include:

- a) Growing popularity of input subsidy schemes (e.g. fertilizer and seed subsidies).
- b) Frequency of export prohibitions.
- c) Price controls for a rising number of products.
- d) Plans for agencies to monitor traders.
- e) Rising debt burden in more countries.
- f) Recent decline in public expenditure in agriculture.

3.2. National policies and strategies

At a national level, the National Development Plan (NDP 2030)¹⁹ remains the overarching policy document. In May 2010, the National Planning Commission (NPC) was appointed by the President of South Africa with Mr Trevor Manuel as Chairperson and Mr Cyril Ramaphosa as Deputy Chairperson. The 26 members were tasked to develop a vision for South Africa and to translate this vision into the NDP 2030. The first step of the NPC was to conduct a diagnostic analysis of South Africa's achievements and shortcomings since 1994 and the resulting Diagnostic Report²⁰ was released in June 2011. In this report, the main reasons for slow progress were identified as a failure to implement policies and an absence of broad partnerships.

In order to combat these challenges, the NPC developed a draft NDP 2030, which was released during November 2011. Following a wide consultative process, the final NDP 2030 was handed to the President on 15 August 2012 and endorsed by all political parties. The NDP 2030 consists of 15 Chapters of which a number provides guidance to the WCDoA, but none is as important as Chapter 6 focussing on “An integrated and inclusive rural economy”. It challenges the South African agricultural sector (and its value chains) to create one million jobs by 2030 through a renewed focus on export orientated, labour intensive irrigated farming. At the same time, 20% of white owned land is to be transferred to black ownership.

The year 2022 marked ten years since South Africa's National Development Plan (NDP) 2030 was adopted in Parliament as the reference point in navigating the country's development process. It was agreed that the objectives of the NDP relating to government action would be incorporated into the Medium-Term Strategic Framework under each administration. Above all, there was a clear understanding that the NDP is not designed for government implementation only, it is to be the Plan

¹⁹NPC (2012) National Development Plan: Our future – make it work. National Planning Commission, The Presidency, Pretoria.

²⁰NPC (2011) Diagnostic overview. National Planning Commission, The Presidency, Pretoria.

for the country. It is against this backdrop that the Ten-Year Review of South Africa's National Development Plan (NDP) was done.

In the Ten-Year Review of the NDP an analysis was done of the progress shown toward the achievement of 2030 targets (NPC 2023) ²¹. The findings of the NDP review indicate that the vision of a future South Africa expressed in the NDP has not materialised over the past decade. Indeed, the information in Table 5 indicates that, with exception of the improvement of number of people employed and income inequality remaining constant, all other indicators actually worsened from the 2012 baseline over the ten-year review period.

Table 5: Progress with Key NDP Indicators: 2012 - 2022

NDP INDICATOR	BASELINE (2012)	TARGET (2030)	PROGRESS (2022)
GDP Growth (average)	3,3% (2011)	5,4%	1,1%
Reduce income inequality (Gini income measure)	0,69 (2009)	0,60	0,69 (2021)
Investment (gross fixed capital formation) as % of GDP	19,3% (2010)	30%	14,1%
Public Sector (state and state-owned entities) investment as % of GDP	6,8%	10%	4,1% (2021)
Labour force participation rate	55,4%	56,6%	59,4%
Reduce unemployment (%)	25,4%	6%	32,9%
Employment (million)	13,65 million	24 million	16,1 million
Employment ratio (employment/working age population)	41,3%	61%	39,9%

Source: NPC (2023)

It is true that the effect of the Covid-19 pandemic and the impact of Russia's invasion of the Ukraine had an impact on the last three years of the period. However, the assessment argues that, at the heart of our current developmental impasse, is the failure to keep the NDP in focus and at the centre of our developmental trajectory as a country. Instead of keeping the long-term plan in view and using it to inform planning and implementation across government, it seems that the NDP has been marginalised. This has reinforced incoherent planning and poor implementation. There is no single cause of the failures to achieve the NDP goals, instead there are multiple interlocking causes detailed in the review. Some of these include systemic challenges compounded by a combination of contextual challenges, such as the consequences of the Covid-19 pandemic, inappropriate policies, weakening governance, corruption, rising crime, and increasing social disintegration

Progress with the inclusion of black farmers remains slow due to factors such as the failures in land reform delivery and the government's reluctance to transfer land rights to beneficiaries, limited access to finance, inefficiencies in state administration and capacity to support farmers and lack of infrastructure in former homelands. The Agriculture and Agro-processing Master Plan was adopted as an instrument to address the issue of inclusion and transformation of the sector and aligns with the ERRP priority to strengthen agriculture and food security (more on this in Section 3.3).

In complementing the National Development Plan vision 2030, the Indlulamithi South Africa Scenarios 2030²², were launched in 2018 as a multi-stakeholder, research-driven initiative to provide tools (in the form of 3 scenarios) to focus leaders from different sectors and communities on the key question: What would a socially cohesive South Africa look like and can we achieve it by 2030?. In order to make provision for subsequent shifts pertaining to climate change, food security,

²¹NPC (2023) National Development Plan: 10 year Review - 2012-2022. National Planning Commission, The Presidency, Pretoria.

²²<https://indlu.storiesandscience.co.za/wp-content/uploads/2022/09/Indlulamithi-Barometer-2022 -digital-brochure-2022-07-288416.pdf>

pandemics, technological advances and geopolitical shifts, the scenarios were updated in 2023 and were renamed the Indlulamithi Scenarios 2035 (see Table 6).

Table 6: The Indlulamithi Scenarios 2035.

Hadedu Home (The recrimination nation)	Vulture Culture (The desperation nation)	Weaver Work (The cooperation nation).
This scenario shows a South Africa where the state and society are in slow decline. No decisive action is taken to improve matters and, instead, blaming everyone for South Africa's ills has become common practice. Deep structural constraints in the economy and slow economic growth remain unresolved, and 70% of South Africans say they do not trust politicians.	In this scenario, by 2030, and on to 2035, South Africa is governed by a populist coalition whose main objective is self-enrichment and patronage. Investor confidence has been eroded; the growth rate is low, unemployment is high (44% with youth unemployment at 63%), and poverty and inequality are extremely serious.	This is a scenario where, after disruptions and protests through the 2020s, there is a coming together of the state, private sector, and civil society in order to jointly identify priorities and, leveraging the strengths of each, change the forms of governance and reform the economy in a way that attracts greater investment and helps to reduce unemployment, inequality and poverty.

A national Indlulamithi Barometer was established to provide an annual assessment of the direction South Africa is moving in relation to the three scenarios and the extent to which the different scenarios are materialising over time. The measured key driving forces include:

- Resistance, resentment, reconciliation: 11 indicators on national identity, personal identity, trust in institutions, shared sense of history and confidence in the future are applied.
- Institutional Capacity and Leadership: 22 indicators for state administrative capacity, policy making capacity, political representation, governance, accountability and civil society and the business environment are applied.
- Social Inequality: 20 indicators on the macro-economy, poverty, employment, education, health and safety are included.

When viewed according to the three key driving forces, the 2023 Barometer shows that the Gwara Gwara (Hadedu Home) scenario remains dominant across all Key Driving Forces since 2019. For this reason, the policies and strategies of the Department has to take cognisance of developments in communities and design intervention strategies that respond to these challenges.

The NDP vision 2030 is broken down by the Department of Planning, Monitoring and Evaluation in the Presidency (DPME) into implementation plans for each of the strategic periods. In the case of the 2020/21 to 2024/25 period, the implementation plan was called a Medium-Term Strategic Framework (MTSF) and it contained seven priorities with five goals and four pillars. For the 2025/26 to 2030/31 period DPME moved away from the concept of a MTSF, but rather to develop a Medium Term Development Plan (MTDP). The Statement of Intent (SOI), signed by the ten (10) parties that make up the Government of National Unity (GNU), was combined with the NDP and submitted to the Cabinet Lekgotla of 13 – 14 July 2024 for consideration. The approved minimum programme of priorities was then translated into the draft MTDP for 2024 – 2029 as a more detailed plan. It follows that the MTDP will form the 5-year Medium Term Plan for the 7th Administration of the Republic of South Africa.

During the Opening of Parliament Address of 18 July 2024, the President confirmed the Strategic Priorities of the 7th Administration²³. These are:

- Inclusive growth and job creation.
- Reduce poverty and tackle the high cost of living.

²³The Presidency (2024) Opening of Parliament Address by President Cyril Ramaphosa. 18 July 2024, Cape Town City Hall. The Presidency, Pretoria.

c) Build a capable, ethical and developmental state.

The draft MTDP²⁴ was subsequently developed into the outcomes and activities mentioned below²⁵ and these were submitted to the Cabinet Lekgotla of September 2024. A subsequent results framework was then developed and submitted at the Cabinet Lekgotla held towards the end of October 2024.

The goal statement for priority 1: Inclusive growth and job creation are: Achieve more rapid, inclusive and sustainable economic growth and job creation. In achieving this, the following outcomes and activities will receive attention:

- a) Outcome: Increased employment opportunities
 - a. Work with the private sector and labour to protect existing jobs and investments in vulnerable sectors.
 - b. Continue to implement and optimise public employment programmes (including the Presidential Employment Stimulus, the National Youth Service, Expanded Public Works) and prioritise work experience for young people.
- b) Outcome: Re-industrialisation, localisation and beneficiation
 - a. Drive growth in labour-intensive sectors such as services, agriculture, manufacturing, mining and tourism, including the finalisation & implementation of master plans.
 - b. Strengthen industrial policy incentives to ensure that these are results-based to support exports and job creation.
 - c. Implement a modern and transparent mining rights system to enable greater investment in exploration and expand mining production.
 - d. Focus on processing our minerals so that we export finished products rather than raw commodities.
 - e. Increase access to blended finance for emerging farmers in export crops and expand access to key markets through trade agreements.
- c) Outcome: Enabling environment for investment and improved competitiveness through structural reforms
 - a. Mainstream red tape reduction across every department and public entity to reduce the undue regulatory burdens that hold back businesses from creating jobs.
 - b. Cut red tape and streamline support for small enterprises, entrepreneurs and cooperatives, especially in townships and villages, to thrive.
 - c. Strengthen the implementation of the visa regime for critical skills, remote working and start-ups.
 - d. Continue the structural economic reforms underway through Operation Vulindlela and initiate a second wave of reforms, including to strengthen local government, address spatial inequality and digital transformation.
 - e. Continue to implement the Freight Logistics Roadmap to enable private sector investment and participation in port and rail, increasing competition and efficiency, while ensuring infrastructure remains state-owned.
 - f. Continue with institutional reforms in the water sector to enable greater investment in bulk water infrastructure and better regulation of water services across the country.
- d) Outcome: Increased infrastructure investment and job creation
 - a. Invest in infrastructure development in key sectors of energy, communications, water and transport infrastructure, and focus on underserved areas.
 - b. Simplifying the regulations on public-private partnerships to enable greater investment in both social and economic infrastructure development.
 - c. Maintenance of public infrastructure through dedicated programmes and establish systems to support this.
- e) Outcome: Energy security and a just energy transition
 - a. Continue to implement the Energy Action Plan and achieve long-term energy security.

²⁴Reference is made to the draft document to allow the reader to understand the complex negotiation process followed and the lengthy timeframe taken to adopt the final MTDP in January 2025.

²⁵DPME (2024) Planning for the 7th Administration: Towards the Medium Terms Development Plan 2024-2029. August 2024, Department of Planning, Monitoring and Evaluation, Pretoria.

- b. Expedite the rollout of the Transmission Development Plan and focus on expanding and strengthening the transmission network.
- c. Implement the Just Energy Transition Investment Plan (JET-IP) and ensure that South Africa's transition to a low-carbon economy supports communities and workers in Mpumalanga and other affected areas.
- d. Set up the special economic zone in Boegoebaai to drive investment in green hydrogen energy projects.
- f) Outcome: Supportive and sustainable economic policy environment
 - a. Ensure that macroeconomic policy and a sustainable fiscal trajectory in support of growth and employment.
 - b. Development an integrated economic strategy that aligns fiscal policy, monetary policy, competition policy, industrial policy, innovation policy and trade policy.
- g) Outcome: Increased investment, trade and tourism
 - a. Prioritise the implementation of the African Continental Free Trade Area to increase our exports to the rest of the continent.
 - b. Strengthen economic diplomacy with our largest trading partners and potential trading partners.
- h) Outcome: Science, technology and innovation for growth
 - a. Grow and transform SA's science, technology and innovation capabilities, human resources and research infrastructure.
 - b. Invest in digital identity and payments, expand access to affordable broadband, and increase training for young people in digital skills.

The goal statement for Strategic Priority 2: Reduce poverty and tackle the high cost of living is: Create a more just society by tackling poverty, develop and empower South Africans and promote social cohesion and nation-building. In achieving this, the following outcomes and activities will receive attention:

- a) Outcome: Reduced poverty and improved livelihoods
 - a. Maintain and optimise subsidised basic services, such as electricity and water, for the poor.
 - b. Expand the basket of essential food items exempt from VAT and introduce a basket of high protein basic foods affordable to all through a partnership with the food industry and civil society.
 - c. Ensure that the National Minimum Wage increases in line with inflation and enforce compliance.
 - d. Ensure that local governments properly implement the indigent policy so that the old, the infirm and the poor are able to get assistance with the payment of basic services.
 - e. Undertake a comprehensive review of administered prices (including the fuel price formula) to identify areas where prices can be reduced.
 - f. Return all passenger rail corridors to service to provide a low-cost transport option for the poor, and ensure we implement an integrated transport network through a managed approach in line with the National Rail Policy.
 - g. Accelerate the release of public land for social housing and redirecting our housing policy to enable people to find affordable homes in areas of their choice.
 - h. The provision of title deeds for land and subsidised housing provides people with assets that they can use to improve their economic position.
 - i. Accelerate land reform, prioritising the transfer of state land, and improve post settlement support.
- b) Outcome: Optimised social protection and coverage
 - a. Optimise social protection within available fiscal resources (including support to the unemployed). Protect the value of social grants for children, the elderly and persons with disabilities.
 - b. Use the Social Relief of Distress (SRD) grant as a basis for the introduction of a sustainable form of income support for unemployed people to address the challenge of income poverty.

- c. An effective, integrated and comprehensive poverty alleviation strategy is necessary to provide protection and support to the most vulnerable in society.
- d. Strengthen the implementation of the National Drug Master Plan to ensure a South Africa free of substance abuse.
- e. Link social assistance with other forms of support to lift people out of poverty.
- c) Outcome: Improved access to affordable and quality healthcare
 - a. Pursue progressive achievement of universal health coverage through the implementation of the National Health Insurance to address inequity and financial hardship in accessing quality health care.
 - b. Strengthen the primary health care (PHC) system by ensuring that home and community-based services, as well as clinics and community health centres are well resourced and appropriately staffed to provide the promotive, preventive, curative, rehabilitative and palliative care services required for South Africa's burden of disease.
 - c. Improve the quality of health care at all levels of the health establishments, inclusive of private and public facilities.
 - d. Improve resource management by optimising human resources and healthcare infrastructure and implementing a single electronic health record.
- d) Outcome: Improved education outcomes and skills
 - a. Put in place a clear and measurable plan to achieve universal access to early childhood development (ECD) by 2030. Implement reforms to modernise management systems and reduce red tape for the mass registration of ECD facilities.
 - b. Implement best practices such as lesson plans, graded reading books, individualised coaching of teachers and other innovations to ensure that all learners can read for meaning by Grade 4.
 - c. Expand vocational and technical training in schools and post-school institutions.
- e) Outcome: Skills for the economy
 - a. In order to produce the skills that the economy needs, we will expand vocational and technical training in schools and post-school institutions, and take a demand-led approach to skills development.
 - b. Strengthen the partnership with the private sector to unlock the deployment of artisans and TVET graduates through workplace - based placements and work integrated learning opportunities.
- f) Outcome: Social cohesion and nation-building
 - a. Promote and protect South Africa's diverse languages and cultures.
 - b. Implement a national civic education campaign on the Constitution, including at all public and private schools.
 - c. Ensure the sustainability of the public broadcaster to fulfil its mandate and develop funding mechanisms to support local content and the creative industry.
 - d. Invest in shared public spaces such as parks and cultural institutions.
 - e. Promote media diversity and independence.
 - f. Promote programmes to combat racism, sexism and other forms of intolerance.
 - g. Promote the involvement of all key stakeholders in the life of our country, representing civil society, traditional leaders, the faith-based sector, labour, business, cultural workers, sports people and other formations representing the diverse interests and voices of our citizens.
 - h. Promote the rights of women, youth, children and persons with disabilities and remove the social, economic, cultural and other barriers to full participation in the economy.

The goal statement for Strategic Priority 3: Build a capable, ethical and developmental state is: Improve the delivery of basic services and bring stability to local government, rebuild the capability of the state and create a professional public service, strengthen law enforcement agencies to address crime and corruption and pursue peace, stability and development in Africa and globally. In achieving this, the following outcomes and activities will receive attention:

- a) Outcome: Improved service delivery at local government
 - a. Bring stability to governance in metros and restore the delivery of services.

- b. Strengthen the ability of national and provincial government to intervene in municipalities which fail to meet minimum norms and standards.
 - c. Implement reforms to the local government system to improve governance, institutional structures and fit-for-purpose funding models to achieve financial sustainability.
 - d. Standardise and professionalise the appointment of municipal managers and CFOs, and ensure independent regulation and oversight of the appointment process.
 - e. Fast-track the development and maintenance of water treatment and distribution infrastructure and wastewater treatment systems.
 - f. Strengthen the regulation of municipal water functions and separate water services authorities from water service providers to enable improved oversight and greater efficiency.
 - g. Simplify and speed up planning and regulatory processes that can make it easier for businesses to invest and operate in a municipality.
 - h. Collaborate with traditional & Khoi-San leadership on local development and land management.
 - i. Strengthen disaster management capabilities at local government to respond effectively to any unforeseen events.
- b) Outcome: Improve governance and performance of public entities
- a. Implement recommendations of the Presidential State-Owned Enterprises Council (PSEC), including the establishment of a centralised ownership model.
 - b. Undertake a comprehensive review of public entities to enable rationalisation, streamlining and implementation of shared services models.
 - c. Strengthen the South African Revenue Service (SARS) to maximise resource mobilisation.
- c) Outcome: A capable and professional public service
- a. Strengthen the role of the Presidency (incl. DPME & DWYPD) to improve planning, policy coordination and management of the cluster system.
 - b. Finalise the Public Service Amendment Bill, Public Administration and Management Amendment Bill, and Public Service Commission Amendment Bill.
 - c. Implement the National Framework towards the Professionalisation of the Public Sector and establish the Office of the Head of the Public Administration to manage career progression and oversight of the senior management service.
 - d. Strengthen the role of the Public Service Commission in the appointment of Directors-General, SOE board directors and key positions such as the National Director of Public Prosecutions to shield them from political interference.
 - e. Reposition the National School of Government as a premier public sector academy and roll-out a Nyukela Programme for Middle Management Service (MMS).
 - f. Conduct Institutional Reviews and Skills Audit to ensure that state institutions are execution driven in line with mandates and public value.
 - g. Develop and implement a roadmap for digital transformation of public services.
 - h. Strengthen the public procurement system, in line with the Public Procurement Act, for efficiencies and effectiveness and to stimulate demand.
 - i. Implement the recommendations of the Personnel Expenditure Review in order to manage the Wage Bill.
 - j. Improve efficiency and productivity of the public sector by mainstreaming red tape reduction across departments and entities.
- d) Outcome: Safer communities and increased business confidence
- a. Continue implementation of the Integrated Crime and Violence Prevention Strategy.
 - b. Continue to strengthen and build the capacity of prosecution and law enforcement agencies to effectively combat crime (incl. corruption).
 - c. Strengthen whistleblower protections through stronger legislation and implement the National Anti-Corruption Strategy.
 - d. Strengthen accountability and consequence management in the public service and conduct lifestyle audits for elected officials and senior public servants.
 - e. Strengthen the capacity of the Hawks to tackle organised crime. Combat infrastructure crime by securing electricity, logistics, water and other critical infrastructure.

- f. Tackle priority crimes like the illicit economy crimes, gang violence, cash-in-transit heists, farm crimes and the construction mafia through specialised police units.
 - g. Move towards evidence-based policing and increase the use of proven technologies, including the modernisation of 10111. Implement a data-driven approach to target violent crime hotspots and direct police resources and personnel to the police stations where crime is most prevalent.
 - h. Work with communities to end crime by working closely with community policing forums and providing safe channels for citizens to report criminal activity.
 - i. Implement the National Strategic Plan on Gender-Based Violence and Femicide and expand victim support services, like the Thuthuzela Centres and GBV desks in police stations.
 - j. Strengthen anti-money laundering and terrorism financing efforts and secure South Africa's removal from the Financial Action Task Force (FATF) list of jurisdictions under increased monitoring.
- e) Outcome: Effective border management and development in Africa
- a. Ensure effective border management to limit transnational crime and promote regional trade and the legal movement of people.
 - b. Use South Africa's Presidency of the G20 to tackle global inequality and poverty and advance sustainable development.
 - c. Promote peace, security, democracy and socioeconomic development in SADC and other parts of the continent. Strengthen the AU Peace and Security and Governance architecture.
 - d. Increase the voice of developing countries in the UN and other multilateral institutions, promoting peace, security and development, South-South and North-South cooperation through BRICS, the G20, the Non-Aligned Movement and other forums.
 - e. Build state capacity through established global public and private partnerships focused on knowledge and people-to-people exchanges.

In 2002, the Cabinet approved the national Integrated Food Security Strategy (IFSS) to create synergies between the wide range of food security programmes in South Africa (DAFF, 2012)²⁶. Because of this strategy, a number of successes have been realised and the country is food secure at a national level and the incidence of hunger is declining. However, access to food (as is required by Section 27 of the Bill of Rights) is not secure for all and household food security is threatened by a number of factors, including food price volatility, and the impact of Climate Change. For this reason a Food and Nutrition Security Policy for South Africa was developed and four factors affecting food security were identified:

- a) Availability of food.
- b) Accessibility of food.
- c) Utilisation of food.
- d) Stability of food supplies.

In response to these challenges a number of response pillars were prioritised:

- a) Effective food assistance networks.
- b) Improved nutrition education.
- c) Alignment of investments in agriculture towards local economic development.
- d) Improved market participation.
- e) Food and Nutrition Security Risk Management.

It is important to note that this strategy as supposed to cover the period 2002 – 2015, but no indication could be obtained that the Strategy has been updated or a new strategy put into place at a national level.

²⁶DAFF (2012) The Integrated Food Security Strategy for South Africa. Department of Agriculture, Forestry and Fisheries, Pretoria.

The Draft National Spatial Development Framework (NSDF) was published in the Government Gazette of 20 January 2020 for comments (DRDLR, 2020)²⁷. In this document the five 'National Spatial Outcomes' are identified (see Table 7).

Table 7: The five National Spatial Outcomes

NO	TITLE	DESCRIPTION
1	National urban network	A network of consolidated, transformed and well-connected national urban nodes, regional development anchors, and development corridors that enable South Africa to derive maximum transformative benefit from urbanisation, urban living and inclusive economic development.
2	National resource production regions	National corridors of opportunity enable sustainable and transformative national development, urbanisation, urban consolidation, mutually beneficial urban and rural linkages and ecological management.
3	National connecting and movement infrastructure	National connectivity and movement infrastructure systems are strategically located, extended and maintained, to support a diverse, adaptive and inclusive space economy and key national and regional gateways.
4	Productive rural regions	Productive Rural Regions, supported through sustainable resource economies and regional development anchors, enhance resilience in rural areas, to enable access to the dividends of urban consolidation, rural innovation and climate adaptation.
5	National ecological infrastructure and natural resource base	National ecological Infrastructure and the national natural resource foundation is well-protected and managed, to enable sustainable and just access to water and other natural resources, both for current and future generations.

Source: Draft National Spatial Development Framework (2020)

The five National Spatial Outcomes were translated into four 'Sub-frames' which largely overlaps with the Outcomes (Outcomes 4 and 5 are combined into one sub-frame with the name 'National ecological infrastructure and natural resource base'). In the final part of the NSDF five 'Strategic Spatial and Implementation Action Areas (AA) were identified. These are:

- a) Action area 1: National Transformation Corridors: (1) Buffalo City via Mthatha to Port Shepstone and (2) Mbombela-Bushbuckridge-Phalaborwa-Thohoyandou-Makhado.
- b) Action area 2: Central Innovation Belt: Emalahleni-Siyabuswa-Rustenburg-City of Matlosana-Sasolburg.
- c) Action area 3: National Resource Risk Area: The (1) Nkangala, (2) Olifants, (3) Waterberg, (4) Umgeni, (5) Berg, and (6) Breede River Catchments.
- d) Action area 4: National Urban Regions.
- e) Action area 5: Arid-Innovation Region.

It is clear that AA1 and AA2 are not relevant to the Western Cape. However, in the case of AA3 the Berg and Breede river catchment areas has been identified as risk areas where land use and water competition as well as pollution risks needs to be addressed. In the case of AA4, Cape Town has been identified as one of the three urban regions of national importance. The fact that one of the five action areas (AA5) focusses on an 'arid innovation region' is probably one of the most important shifts in focus. It is suggested that in the arid region, covering most of the Karoo (see Figure 1), a number activities should follow. These include regional adaptation, economic diversification and agri-innovation at scale. Emphasis is placed on cross-provincial and cross-municipal collaborative

²⁷DRDLR (2020) National Spatial Development Framework. Published in the Government Gazette of 20 January 2020. Department of Rural Development and Land Reform, Pretoria.

spatial development, planning and governance as well as strong regional growth and development compacts.

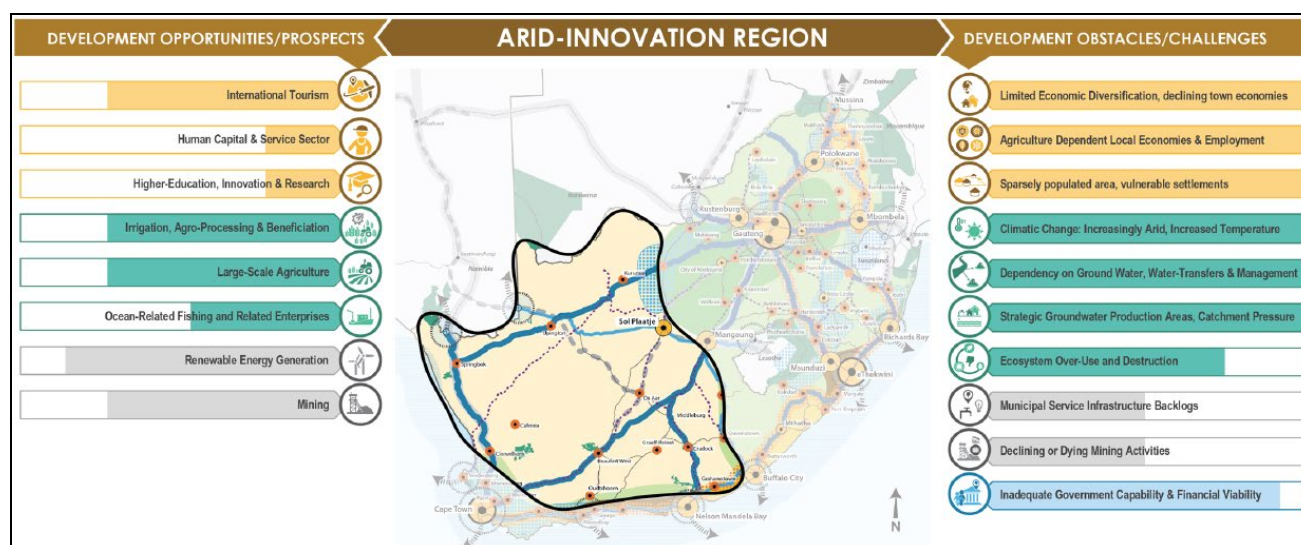


Figure 1: Arid-innovation Region overview.

Source: Draft National Spatial Development Framework (2018)

In an effort to fast-track delivery on the commitments made in the NDP 2030, Operation Phakisa: Agriculture, Land Reform and Rural Development was launched in 2017. Operation Phakisa is based on the “Big Fast Results” methodology developed by Malaysia and is a results-driven approach through which clear plans on targets are set after which progress is continuously monitored. This approach was applied to a number of focus areas in South Africa and agriculture was fortunate to receive attention for this intervention. At the time of its release four national departments (i.e. Agriculture, Forestry and Fisheries; Rural Development and Land Reform; Labour; Higher Education and Training) were identified to take the lead during the implementation phase. The outcome of the process is that there are 27 Operation Phakisa initiatives that can be clustered into six focus areas, namely:

- Optimising the Management of Natural Resources
- Developing Skills and Capacity
- Funding and Finance
- Value Chain Development and Market Access
- Coordination and Knowledge Management
- Reconfiguring Space and Promoting Functional Rural Settlement.

3.3. National Agricultural policies and strategies

In his first budget vote²⁸, the Minister for Agriculture, Minister Steenhuisen, indicated that the Agriculture and Agro-processing Master Plan (AAMP) is the framework upon which the inclusive growth of the Agricultural sector is premised. The AAMP adoption process has enjoyed broad sectoral support and he indicated that he has no intention of reinventing the wheel. Instead, the focus will rather be on accelerating implementation of the objectives of the AAMP and ensuring that his department upholds its commitments contained in the plan. In addition, he also indicated the following priority areas, all of which is in line with the AAMP:

- Conducive policy and regulatory environment
- Ensuring food security
- Biosecurity and phytosanitary interventions
- Farmer support
- Agricultural exports
- Disaster management

²⁸DALRRD (2024) Budget Vote 29: Agriculture. Minister JH Steenhuisen. DALRRD, Pretoria

It is important that he also mentioned that a number of the interventions to achieve these priorities are outside the Department of Agriculture, and for this reason a transversal and multi-institution approach need to be followed to achieve the outcomes foreseen.

During his keynote address²⁹ at the Strategic Planning Session of the (then still) to be established National Department of Agriculture (DoA), the National Minister for Agriculture highlighted his Strategic priorities for the DoA. As he had time to reflect, it is clear that there were changes to the priorities. During the same address, the Minister also used the opportunity to provide guidance to the DoA in terms of the actions that need to be taken. The key elements of this keynote address are provided in Table 8.

Table 8: The Minister of Agriculture's Strategic Priorities for the DoA.

PRIORITY	TO BE DONE BY
1. Partnerships for growth.	<ul style="list-style-type: none"> a) Closer collaboration with commodity bodies to share experience and knowledge and ensure an open communication channel that will allow the department to be more attuned to what assistance and support they require to improve the commodity value chains. b) Collaboration with the representatives of all organised agriculture bodies to foster a two-way communication channel that will allow the department to be appraised of the issues, concerns and ideas of their members. c) Improved communication from the department on interventions and initiatives. d) Improved turn-around time for requests for assistance, intervention or information.
2. A Modern and Progressive Legislative and Regulatory Environment.	<ul style="list-style-type: none"> a) A full review of all legislation that is impeding the growth of the agricultural sector with a view to repealing, amending or replacing this legislation with new legislation that is more modern and progressive. b) A review of all regulations with a view to removing all regulations that do not serve their purpose and removing regulations that add friction costs to successful agricultural production and/or unnecessarily add to the cost of food for consumers. c) Maintaining an open door policy with the sector to enable them to assist in identifying red-tape and poor legislation with a view to fixing this. d) Making sure that legislative and regulatory amendments or introductions are fully canvassed with the sector to identify unintended consequences, prior to introduction.
3. Improving Market Access for South African Agriculture.	<ul style="list-style-type: none"> a) Reviewing existing trade agreements with other markets (AGOA, SA-EU, etc) to ensure that they are fully utilising the provisions therein to maximise the quantity and type of products available to export within these existing agreements. b) Through the AAMP and value chain round tables work together with commodity organisations to identify potential new markets for South African agricultural products. c) Work to improve biosecurity to expand access for South African products. d) Work with DTIC on leveraging multilateral membership of BRICS, IBSA, SADC, AU to obtain more favourable tariff agreements for South African products. e) Intervention with DIRCO to ensure that Note Verbales are shared timeously in order for the department to be more responsive to requests. f) Streamlining and fast tracking the preparation and response times for protocols and questionnaires with a register to be established to track progress.

²⁹Minister (2024) Department of Agriculture-Strategic Priorities. Keynote address at the Strategic Planning Session of the DoA. 21 – 23 October 2024, Hartebeespoort Dam, North West.

PRIORITY	TO BE DONE BY
	g) A welcoming, responsive and professional international outreach function in the department.
4. Providing Effective Support for Farmers to ensure inclusive, viable, sustainable and profitable farming operations.	<ul style="list-style-type: none"> a) Working with the Land Bank and other strategic local and international partners to broaden the pool of available capital to expand and enhance the blended finance model. This will lead to greater access by farmers to a greater pool of patient capital that is adaptive to the requirements of the sector. b) Ensure that more farmers, currently farming on leased land, are given title to the land that they are on in order for this to be used as a financial instrument to leverage further capital. c) Develop a more creative and innovative way to use the land owned by the department in the Agriculture Land Holding Account to benefit more farmers who wish to enter the agricultural space or wish to expand their current operations. d) Working with local and international organisations to create a fund, along the lines of the agro-energy fund that will facilitate greater mechanisation and precision farming to be implemented. This will improve yield and profitably. e) Partner with private sector players, industry bodies, commodity organisations and international agencies to expand and improve the extension services offered by the department. f) Maximise the accessibility to international grant funding to fill the fiscal gap in the department. g) Establish through a public private partnership with the Land Bank, the private insurance industry and the department an insurance option for farmers that is accessible to more farmers, particularly subsistence, smallholder and family farmers. The current products on offer are too expensive and out of the reach of most players in this category. h) Target projects to be measured not against a 'tick-box' model but rather on a results-based model that measures economic and employment impact and sustainability. i) Better monitoring over grant funding to ensure payment against outcomes. Make greater use of identified and successful implementing agents with a history of successful project establishment. j) Focus on the irrigation schemes as a quick win. k) Work with the DPW to identify and obtain access to quality agricultural land in government ownership that is currently lying fallow or is underutilised for transfer to qualifying beneficiaries.
5. Biosecurity is everybody's responsibility.	<ul style="list-style-type: none"> a) The establishment of a Biosecurity Council/Hub made up of SAPS, BMA, academics, veterinary practitioners, scientists, international agencies and departmental officials to advise on new protocols and programmes to improve biosecurity across the country. b) A communication plan to recruit broader society into the importance of biosecurity from an economic and health perspective. c) Introduce, in partnership with the industry bodies, a "farm to fork" track and trace system for the movement of livestock in the Republic. The tagging of every animal and the geofencing of every farm, abattoir and feedlot. This will be allied with an efficient system to govern the movement of animals on the issuance of a generated certificate. d) Early warning monitoring systems to be developed for both plant and animal diseases. e) Intervention teams to be able to provide a rapid-response to outbreaks of disease. f) Restoration of OBP capacity to meet the veterinary requirements of South Africa.

PRIORITY	TO BE DONE BY
	g) Enhancement of veterinary services and number of veterinarians. h) Reintroduce the "dip-tank" culture and partner with traditional leadership for sharing knowledge about biosecurity importance in rural areas.
6. Advocacy for a growing sector.	a) Interaction with the department of Transport on the rail system and particularly the Cape Town port which is the primary export hub for South African agricultural products, most notably fruit and citrus. b) A public advocacy campaign, together with the industry around the CT port, calling for public private partnerships to improve efficiency. c) Interaction with Water and Sanitation to expedite the granting of water licenses to farmers and for the raising of dam walls to expand the hectareage of land under irrigation. d) Interaction with COGTA on municipal infrastructure challenges such as roads and sewerage e) Interaction with SAPS to focus resources on rural safety and security f) Interaction with DIRCO to improve agricultural representation at missions and expediting of requests from international governments and investors.
7. Improving Food Security	a) Using the National Food and Nutrition Security Survey, 2024 as a data point to focus on evidence-based interventions and projects in the most vulnerable areas. b) Drive awareness and promote advocacy across government about food insecurity. c) Developing the 2024-2029 food security plan in a whole of society manner. d) Encouraging community projects at schools and other points of access to ensure projects are viable and sustainable. e) Collaboration with the department of Forestry, Fisheries and Environment to adopt a strategy for dealing with the food waste crisis in South Africa.

After its Strategic Session, the DoA developed the first draft of its Strategic Plan³⁰. In this plan due recognition is given to the AAMP as its most important policy implementation instrument. However, it is also recognised that the AAMP is currently hampered by delays and inefficiencies. Nevertheless, it is important to note the outcomes and targets which has been set for the DoA (See Table 9)

Table 9: The outcomes of the DoA as captured in its first-draft Strategic Plan.

OUTCOME	INDICATOR	BASELINE	FIVE-YEAR TARGET
Improved governance and modernised service delivery	Percentage compliance with legislative frameworks	New indicator	100% compliance
	Percentage achievement of KPIs	New Indicator	90%
	Audit outcome opinion	Unqualified	Clean audit
	Departmental systems modernised and digitised	18 % of automation	Departmental systems modernised and digitised
Increased production in the agricultural sector	Average growth rate increased in agricultural productivity	New indicator	2.6 MT Field crops 0.6 MT Horticulture 0.6 MT Livestock
Food and Nutrition security	% Households lifted out of severe food and nutrition insecurity	17. 5%	17.5%
Increased production	Increased % in the	8	20%

³⁰DALRRD (2025) Strategic Plan 2025 – 2029/30 (1st Draft): Department of Agriculture, Pretoria.

OUTCOME	INDICATOR	BASELINE	FIVE-YEAR TARGET
share of black producers in overall production to stimulate meaningful transformation	share of black farmers in overall production		
Increased market access	% increase in the value of agricultural exports	6% average over the past 5 years	5 %
Enhanced biosecurity and effective disaster risk reduction	% compliance and enforcement with biosecurity policies and measures	New indicator	100%
	Biosecurity council established to advise new protocols (functional)	New indicator	

It is clear from the information provided above that the AAMP will remain the key implementation strategy of the DoA. The development work for AAMP stretches back to 2001 and it builds on the first Strategic Plan for South Africa's Agricultural Sector, the Sector Plan, Operation Phakisa, the National Development Plan and research work done by various industry bodies as well as research institution such as the Bureau for Food and Agricultural Policy (BFAP). Since June 2020 a further inclusive journey was embarked upon, and the AAMP³¹ was co-signed by the Minister for Agriculture, as well as a range of stakeholders in the Sector, during May 2022.

All social partners agreed to strive towards globally competitive agriculture and agro-processing sector, support market-oriented and inclusive production to develop rural economies, ensure food security and create decent and inclusive employment and entrepreneurship opportunities for all participants in agriculture and agro-processing value chains. The Master Plan has the following specific objectives:

- a) Increase food security in South Africa;
- b) Promote and accelerate sustainable transformation in the agriculture and agro-processing sectors;
- c) Improve access to local and export markets, which will require constant upgrades in the quality of supply to bolster South Africa's competitiveness
- d) Enhance competitiveness and entrepreneurship opportunities through technological innovation, innovative financing models for black farmers, infrastructure construction and digitalisation;
- e) Create an effective farmer support system and agro-processing incentives;
- f) Create decent, growing and inclusive employment, in addition to improving working conditions and fair wages in the sector;
- g) Improve the safety of the farming community and reduce stock and crop thefts and farm attacks;
- h) Create a capable state and enabling policy environment; and
- i) Enhance resilience to the effects of climate change and promote sustainable management of natural resources.

The social partners have also identified six pillars as means of achieving the goals above, as well as a framework for guiding their negotiations across different value chains and cross-cutting enabling measure. These six pillars are:

- a) Resolving policy ambiguities and creating an investment-friendly environment
- b) Investing in and maintaining enabling infrastructure critical to industry, such as electricity, roads; rail and ports;
- c) Providing comprehensive farmer assistance, development finance, R&D and extension services

³¹DALRRD (2022) Agriculture and Agro-Processing Master Plan "Social Compact". Department of Agriculture, Land Reform and Rural Development, Pretoria.

- d) Improving food security, increasing production and employment and ensuring decency and inclusivity;
- e) Facilitating market expansion, improving market access, and promoting trade;
- f) Improving localised food production, reducing imports and expanding agro-processing exports.

The approach to be followed is to focus on market-led and district-based commodity value chains and corridors. It is important to note that this approach is aligned with the Joint District Approach (JDA) being implemented by the Province. As the WCDoA was part of the Development of the AAMP and it also supports the principles and priorities of the AAMP, the Department concluded that the AAMP is aligned to its own approach and priorities. It follows that the approach and relevant Infrastructure projects must be supported as enablers to fulfil this intervention from DALRRD. Consequently, the WCDoA has submitted following five catalytic projects for inclusion in the AAMP:

- a) Increasing the water available from the Brandvlei Dam by 33 million m³. This will increase the area under irrigation farming by 4 400 ha which will increase the value of agricultural production from R4,2 billion to R7,2 billion, direct employment from 28 800 to 47 700 and the achievement of 56% of the land reform target in the Langeberg and Breede Valley municipalities.
- b) Increasing from 12 million m³ to 23,3 million m³ the water from the Buffeljags Dam. This will allow irrigation production to increase by 1 852 ha which will increase the value of agricultural production by R1,2 billion and create 2 850 jobs in the area. As there is currently surplus water in the system and surplus capacity, a large part of this increase can be done with minimal cost to government and there may also be additional phases which could increase irrigation farming even further.
- c) The raising of the Clanwilliam Dam will ensure water allocation reform and socio-economic development in the Matzikama and Cederberg Municipalities of the West Coast District. Raising the dam by 13m will increase the yield of the dam to a total of 169 million m³ per year, making water available for the development of more than 6 000ha additional irrigation of high value crops. This will lead to on-farm investment totalling R1.8 billion and the creation of 9 000 direct and indirect jobs throughout the value chain.
- d) To increase agricultural production in the Little Karoo and surrounding areas to the value of R110 million per year and the creation of 1 000 additional jobs in the value chain. In addition, a 2 500ha increase in the area of high value crops under irrigation with an associated increase in turnover of R400 million with 3 750 jobs additionally created.
- e) Targeted and specific interventions by the National Government to put in place an effective production scheme which will facilitate international and domestic trade, improve export facilitating infrastructure, ensure financial support to agriculture and facilitate transformation.

In addition to these projects, it was also requested of provinces to contribute to achieving the six pillars in the AAMP. This was done by the Western Cape and the link between departmental indicators and the AAMP is provided in Table 10. More detail, including the targets set for the MTEF period, will be provided in the Department's APP.

Table 10: Linking the AAMP to Departmental indicators for the 2025/26 financial year.

AAMP PILLAR		Number of APP indicators		
No	Title	Sector	Prov	Total
1	Resolving policy ambiguities and creating an investment-friendly environment	5	4	9
2	Investing in, and maintaining enabling infrastructure critical to industry, such as electricity, roads, rail and ports	1	3	4
3	Providing comprehensive farmer assistance, development finance, R&D and extension services	8	16	24
4	Improving food security, increasing production and employment and ensuring decency and inclusivity	7	8	15
5	Facilitating market expansion, improving market access, and promoting trade	0	3	3
6	Improving localised food production, reducing imports and expanding agro-processing exports	2	2	4
Total		23	36	59

3.4. The MTDP 2024-2029 Alignment to provincial policies and strategies

Provincial policies and strategies must be linked to the broader goals and frameworks set out in the Medium-Term Development Plan (MTDP). This alignment ensures that local initiatives contribute to national development objectives, creating a cohesive and integrated approach to growth and progress. It is therefore important to discuss how the WCG has aligned its planning processes to the final MTDP guidelines approved in January 2025. This MTDP 2024-2029 serves as the five-year strategic plan for South Africa's 7th Administration under the Government of National Unity (GNU), formed following the 29 May 2024 general elections. It acts as the implementation framework for the National Development Plan (NDP): Vision 2030, aligning with its goals while emphasizing development outcomes and economic growth.

The MTDP replaces the Medium-Term Strategic Framework (MTSF) and is designed to focus on fewer, high-impact interventions to drive measurable results. It was approved by Cabinet Lekgotla on 29 January 2025 and is structured around three core strategic priorities:

1. Drive inclusive growth & job creation (Apex priority) – driving economic interventions across all spheres of government.
2. Reduce poverty & tackle the high cost of living – ensuring social protection and economic inclusion.
3. Build a capable, ethical & developmental state – enhancing governance, law and order, and enabling infrastructure.

The WCG aligns its strategies with the MTDP's priorities while maintaining its own provincial mandates through the Provincial Strategic Plan (PSP) and the Provincial Strategic Implementation Plan (PSIP).

- Economic Growth & Job Creation: WCG will contribute through provincial economic policies, investment attraction, skills development, and infrastructure projects that support the national focus on inclusive growth.
- Poverty Reduction & Social Interventions: WCG's social development programs, health initiatives, and education reforms will align with the national emphasis on lowering the cost of living.
- Building a Capable State: The WCG's governance innovation, service delivery efficiency, and regulatory frameworks will support the national goal of strengthening institutional capacity and ethical leadership.

The link between the national, provincial and local policy strategies to the departmental interventions can be viewed in annexures JI of the APP 2025/26.

3.5. The Provincial Strategic Plan 2025-2030

The Provincial Strategic Plan (PSP) 2025-2030 sets out the Western Cape Government's (WCG) strategic priorities and goals for the next five years. It provides overarching direction for government action, focusing on people-centred outcomes that drive meaningful change for residents (see Figure 2).

In the past, the process of developing a Provincial Strategic Plan (PSP) normally only started after the new government was inaugurated and they could voice their own priorities. This time around, the process started earlier with DG circular 15 of 5 April 2024³² in which the PSP process was outlined. The intention was that the process should kick off with a "Global Megatrends and Related Risks" workshop after which a series of documents were to be developed (e.g. situational analysis) during which line departments were not necessarily involved. During April – May 2024 a series of workshops were to follow with the finalisation of Change Strategies for the four Priorities of Jobs, Wellbeing, Safety as well as Innovation, Culture and Governance (IGC). The first draft PSP framework (note, only a framework and not a strategy yet) was due in July 2024 through which the departments would receive a guideline of the PSP principles for inclusion in their SP and APPs. The 2nd Draft PSP was due in September 2024, but this was probably never a realistic target.

The MegaTrends workshop took place on 16 May 2024 and in preparation the DotP Team went through an intensive analysis and literature review process. They argued that the observed fraying social fabric has its roots in man-made or fabricated, nature and ecology, economic and geopolitical as well as demographical origins. However, at the same time it must be recognised that these are all interconnected and that there exist feedback loops with various strengths and directions between the various elements. The resulting big issues facing citizens have different impacts on individuals, communities and businesses and it may bring new responsibilities, but also opportunities, for government. The megatrends identified were:

- a) Climate Change
- b) Resource stress
- c) Strained macroeconomic environment
- d) A fractured geopolitical world
- e) Migration
- f) Aging
- g) Urbanisation
- h) Technology acceleration

One of the big challenges faced by any strategy at provincial or national level is to move from a fragmented (sector/issue specific) and towards a unified strategy. At the time of developing the PSP the Province had four priorities which trace its origins back to the post Covid-19 recovery plan of 2021. During the process of developing the PSP it was decided that these four will remain the Provincial Priorities and that it provides a structure to organise provincial departments into clusters. Furthermore, for each Priority an impact statement and a comprehensive Change Strategy have already been developed to guide the Priority over the period 2025 – 2030.

³²DG (2024) DG Circular No 15 – 2025-2023 Provincial Strategic Planning and Associated Process. Department of the Premier, Cape Town.

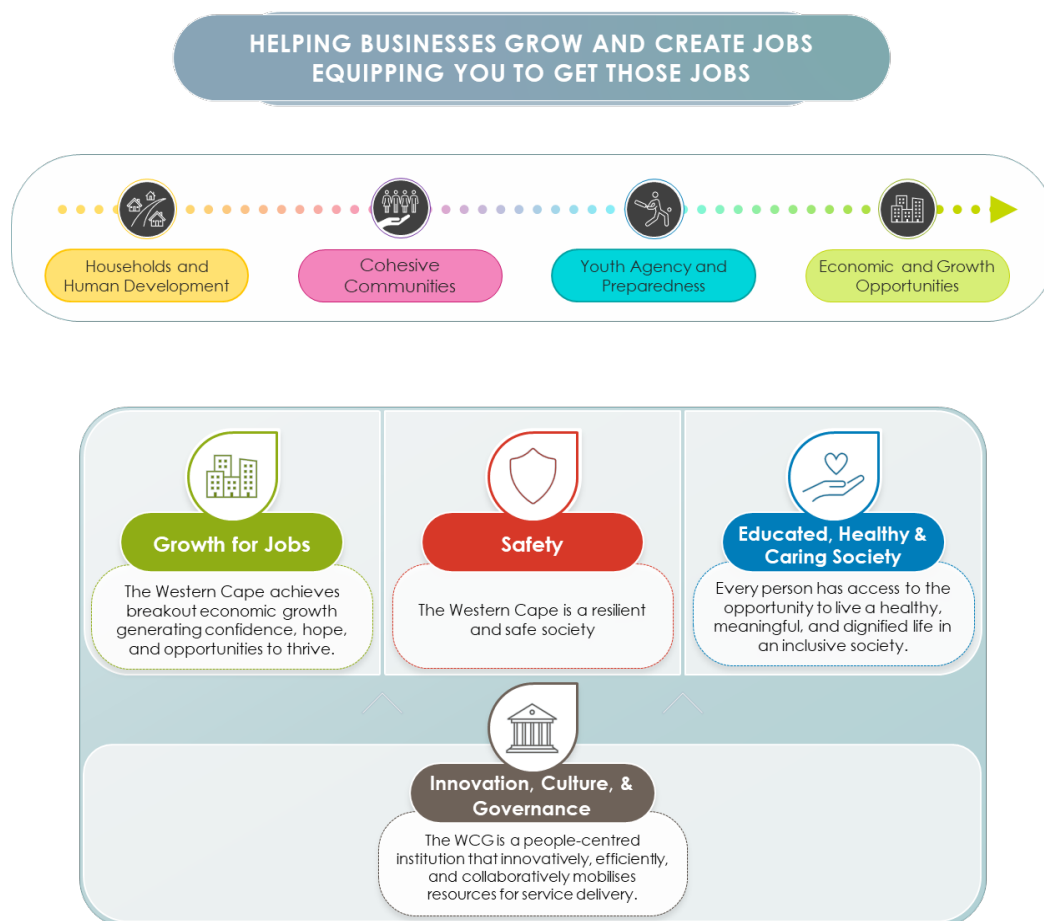




Figure 2: Vision, integration areas and impact statements³³

Provincial Portfolios



The implementation of the PSP is driven by four Provincial portfolios. The portfolios are clusters of Departments that provide strategic direction and coordinate efforts to implement programmes aligned with the Western Cape Government's key priorities. These priorities span economic, safety, social, and institutional policy domains.

The portfolios monitor and steer high-priority projects and programmes, ensuring a cohesive and coordinated approach to achieving shared outcomes. Each Department contributes to one or more portfolios by implementing targeted interventions that support the intended impact of that portfolio. The four strategic portfolios are described in Table 11.:

Table 11: Four strategic priorities of the Province.

IMPACT	DESCRIPTION
 Growth for Jobs	The Western Cape achieves breakout economic growth generating confidence, hope, and opportunities to thrive.
 Educated, Healthy, and Caring Society	Every person has access to the opportunity to live a healthy, meaningful, and dignified life in an inclusive society

³³ DotP (2024) PSP 2025-30 Framework. Presentation at the Strategic Planning Session, Cape Town, 7 August 2024.

IMPACT	DESCRIPTION
 Safety	The Western Cape is a resilient and safe society.
 Innovation, Culture, and Governance	The WCG is a people-centred institution that innovatively, efficiently, and collaboratively mobilises resources for service delivery

Integrated Impact Areas

To maximise the effectiveness of government interventions, the PSP follows a life course and systems approach. This means that policies and programmes consider the needs and responsibilities of residents from childhood to old age, ensuring government services are structured accordingly. See Figure 3.



Figure 3: Integrated impact for each of the four areas of live course

The PSP promotes an integrated approach where Departments and entities work together towards the Integrated Impact outlined for each of the four areas of the life course. Finally, these integrated impact areas are listed in the table 12 below:

Table 12: Four Impact areas of the Province.

IMPACT	DESCRIPTION
Households and Human Development	Creating safe, healthy environments that promote lifelong development and self-sufficiency
Cohesive Communities	Strengthening social ties to build safe, caring, and resilient communities.
Youth Agency & Preparedness	Empowering young people with the skills and opportunities to participate in society, access economic opportunities, and continue learning.
Economic & Growth Opportunities	Expanding economic opportunities and fostering confidence, hope, and prosperity.

In addition, two transversal areas address broader structural and environmental factors that shape service delivery and enable people along the entire life course **Table 13**:

Table 13: Two transversal impact areas of the Province.

IMPACT	DESCRIPTION
Resource Resilience	Creating safe, healthy environments that promote lifelong development and self-sufficiency
Spatial Transformation, Infrastructure, and Mobility	Strengthening social ties to build safe, caring, and resilient communities.

Department's Alignment with PSP Focus Areas

The PSP outlines key focus areas that align with its Portfolios and Integrated Impact Areas. Each department aligns its Strategic Plan with these focus areas to ensure a coordinated approach to achieving provincial priorities. Key focus areas for the Department are presented in **Figure 4**.





 Growth for Jobs	 Educated, Healthy & Caring Society	 Safety	 Innovation, Culture, & Governance
<p>Access to Employability and Economic Opportunities</p> <p>Driving Growth Opportunities through Investment</p> <p>Stimulating Market Growth through Exports and Domestic Markets</p> <p>Water Security and Resilience</p>	<p>Improved Child Welfare</p> <p>Increase the Wellbeing and Agency of Adults and Older Persons</p> <p>Improved Spatial Transformation and Social Infrastructure</p> <p>Effective Approach to One Health and Disaster Management</p>	<p>Safe and Cohesive Communities and Infrastructure</p> <p>Effective and Responsive Law Enforcement</p>	<p>Culture and People-Centred Delivery</p> <p>Ease of Doing Government</p>

Figure 4: Transversal area high-level outcome statements.

Through the above focus areas, the Department contributes to integrated impact in Households and Human Development, Cohesive Communities, Economic and Growth Opportunities, Resource Resilience, Spatial Transformation, Infrastructure, and Mobility and Service Delivery Enablers

3.6. Growth for Jobs (G4J) Strategy

Subsequent to the introduction of the Economic Recovery Plan, the economic cluster of the Province identified the need for a strategy to lift the provincial growth rate on a 'break out' trajectory to address its socio-economic challenges. Underpinning this decision was the fact that the Western Cape Province, like the rest of South Africa, is experiencing growth at a level which will not lead to the solution of a range of socio-economic challenges such as unemployment, poverty and crime. The subsequent Growth for Jobs (G4J) Strategy therefore sets out a comprehensive, challenging and ambitious goal for the Western Cape of growing the provincial economy by between 4 and 6% by 2035.

At its heart, the G4J Strategy is premised on the recognition that the private sector creates jobs and the state needs to create an environment in which people and businesses are enabled to create and exploit opportunities as they arise. This kind of 'horizontal' enablement empowers citizens and fosters independence, freedom and self-reliance. To give effect to this approach, the G4J Strategy has several important anchors. These include clear principles set out in a strategic framework (which have guided thinking and decisions), crucial Priority Focus Areas (which shape the decisions around the nature of the interventions needed to maximise impact) and key levers, enablers and accelerators (to facilitate the achievement of these goals). Finally, it was recognised that the G4J is not the work of any one department, but it needs an 'all of government' and 'all of society' approach³⁴. The G4J strategy was approved by Cabinet on 19 April 2023 and in August 2024 it was reconfirmed by the new Cabinet that it remains the economic strategy for the Western Cape Province for 2024³⁵. For the implementation of the G4J Strategy, seven Priority Focus Areas (PFAs) was also developed. These PFAs are:

PFA 1: Driving Growth opportunities through Investment

PFA 2: Stimulating Market Growth through Exports and Domestic Markets

PFA 3: Energy Resilience and Transition to Net Zero-Carbon

PFA 4: Water Security Resilience

PFA 5: Technology and Innovation

PFA 6: Infrastructure and Connected Economy.

PFA 7: Improved Access to Economic Opportunities and Employability.

During the Cabinet Submission of August 2024, it was also approved that the Minister for Agriculture, Economic Development and Tourism should take responsibility for the overall coordination of the G4J Strategy and that the Director General, supported by the HOD for Economic Development and Tourism, should support the Minister to this end. This Cabinet Submission also confirmed the earlier decision of the various ministerial champions and HOD leads for the various Departments (See Table 14).

Table 14: Ministerial Champions and HOD leads for the various PFAs

Priority Focus Area	PFA Ministerial Champions	PFA Head of Department Leads
PFA 1: Driving Growth opportunities through investment	Minister of Agriculture, Economic Development and Tourism	HOD of Economic Development and Tourism
PFA 2: Stimulating Market Growth through Exports and Domestic Markets	Minister of Agriculture, Economic Development and Tourism	HOD of the Department of Agriculture
PFA 3: Energy Resilience and Transition to Net Zero-Carbon	Premier of the Province	Director-General of WCG (Supported by HOD of Infrastructure)
PFA 4: Water Security Resilience	Minister of Local Government, Environmental Affairs and Development Planning	HOD of Local Government, (Supported by HOD of Environmental Affairs and Development Planning)
PFA 5: Technology and Innovation	Minister of Agriculture, Economic Development and Tourism	HOD of Economic Development and Tourism (Supported by the DG, HOD of Environmental Affairs and Development Planning)
PFA 6: Infrastructure and Connected Economy	Minister of Infrastructure	HOD of Infrastructure supported by the DG and HODs for Health and Education

³⁴G4J 2023 Western Cape Growth for Jobs Strategy 2035 as approved by Cabinet. Western Cape Government, Cape Town.

³⁵G4J 2024 Affirmation of the Western Cape Growth for Jobs (G4J) Strategy and the Establishment of Western Cape Growth for Jobs Cabinet Sub-Committee. Western Cape Government, Cape Town.

Priority Focus Area	PFA Ministerial Champions	PFA Head of Department Leads
PFA 7: Improved Access to Economic Opportunities and Employability.	Minister of Education	HOD of Education

As the objective of the G4J Strategy is to achieve break-out growth of between 4 – 6% to achieve its objectives of job creation and inclusive growth, the goal statement for the G4J strategy is: By 2035, the Western Cape will be a R1-trillion inclusive economy in real terms and growing at between 4% and 6% per annum. This will be achieved through enabling a competitive business environment in which growth is driven through businesses exploiting opportunities.

This goal statement was broken down into a goal statement per PFA, but concern was raised by the fact that both the overarching goal statement as well as the PFA specific goal statements has a horizon of 2035; which is more than a decade after the G4J Strategy was approved. Hence, the question: How will the current administration know that the implementation of the strategy is well on track and that it has met its targets? For this reason goal statements for 2030 for each of the PFAs were also developed and approved. In Table 15 both these goal statements, the one for 2035 and the other for 2030, are depicted.

Table 15: Long- and medium-term goal statements for the various PFAs

Priority Focus Area	Goal Statement 2035	Goal statement 2030
PFA 1: Driving Growth opportunities through investment	Private-sector investment will be 20% of regional GDP (translating to R200-billion) by 2035.	Private sector investment will be valued at R75 billion in 2030.
PFA 2: Stimulating Market Growth through Exports and Domestic Markets	The value of Western Cape exports of goods and services (inclusive of tourism) will triple by 2035.	By 2030, we will increase goods and services exports by R127bn to reach R320bn, with an additional 1 million international tourists and 200 000 domestic tourists
PFA 3: Energy Resilience and Transition to Net Zero-Carbon	Reduce reliance of energy from Eskom of between 1 800 – 5 700 MW by 2035, estimated to attract between R21.6-billion and R68.4-billion in related investment.	Reduce reliance on Eskom of 1 400 MW by 2030, estimated to attract R16.8 billion in related investment.
PFA 4: Water Security Resilience	Double the amount of water available for secondary and tertiary economic sectors (primarily from non-productive use) by 2035 and honour existing allocations to agriculture.	An additional 220 Mm ³ /a for the economy will be availed, achieved by: 1. Supply-side measures =170 Mm ³ /a 2. Demand-side measures = 50 Mm ³ /a 3. Shift 120 Mm ³ /a from residential use by reducing household consumption in litres /person/day from 230 to 180
PFA 5: Technology and Innovation	By 2035, research and development expenditure will increase by 300% in real terms, reaching R35-billion and venture capital deals will total R20-billion.	51% increase in R&D expenditure to reach R15bn (in year 5). Venture Capital deals will total R23bn cumulative by 2030.

Priority Focus Area	Goal Statement 2035	Goal statement 2030
PFA 6: Infrastructure and Connected Economy	By 2035, the Western Cape economy will have the infrastructure required to support and enable a R1-trillion economy and public sector capital investment in the Western Cape will be 10% of regional GDP.	Public sector infrastructure investment will be R27 billion (in real terms) Develop a R200 billion infrastructure pipeline of bankable WC projects ready for execution, and 1 pipeline project fully implemented
PFA 7: Improved Access to Economic Opportunities and Employability.	All citizens who want to be economically active have improved access to economic opportunities and employability through at least one pathway, with pathways comprising improved employability assets (knowledge, skills, experience, and/or competencies), career management skills, workplace-ready capabilities and skills, economic opportunities more accessible to communities, and entrepreneurship.	Increase the completion rate of 12 years (grades 1 to 12) of schooling from 69% to 75%. Increase the number of tertiary qualified individuals by 30%. At least two of the five pathways have become significantly more accessible to all citizens. Increase the Western Cape Entrepreneurship Rate to 15%. Increase the employability of youth participating in WCG programmes to 80%.

The whole implementation plan for the G4J strategy cannot be explained in this SP and will be more appropriate to indicate how the WCDoA responds in the process of reaching the objectives of the Strategy. The causality model of the Department will only be discussed in Section 8.2.7, but the linkages between the causality argument and the G4J Strategy can already be highlighted.

- Market growth, both international and domestic, is a key element of the causality argument. This clearly link to PFA 2.
- Market growth leads to income growth and capital formation which link to PFA 1. Furthermore, the sub-system formed between economic growth, household food security and job creation, leads to further investment stimulation.
- The interventions pertaining to water and SmartAgri make a direct contribution to PFA 4.
- Technology, with specific reference to the Fourth Industrial Revolution (4th IR) and innovation is one of the key enablers in the causality model. This clearly links with PFA 5.
- The role of farmer development, transformation, skills development and youth development in the causality model links to PFA 7.

Due to these linkages, outcomes indicators described in Section 9.2 clearly link to the Outcomes statements of the G4J Strategy.

On a very practical level the linkages between the various PFAs and the G4J is provided in Table 16.

Table 16: Link between the G4J PFAs and the WCDoA's indicators

Priority Focus Area		Number of indicators		
No	Title	Sector	Prov	Total
1	Driving growth opportunities through investment.	8	4	12
2	Stimulating Market Growth through Exports and Domestic Markets.	8	4	12
3	Energy Resilience and Transition to net zero carbon	4	3	7
4	Water security and resilience	2	3	5
5	Technology and innovation	7	9	16

Priority Focus Area		Number of indicators		
No	Title	Sector	Prov	Total
6	Infrastructure and connected economy	1	3	4
7	Improved access to economic opportunities and employability	4	14	18
TOTAL		34	40	74

Examples of specific targets to be delivered over the MTEF period can be found in Table 17.

Table 17: Specific deliverables for the G4J Strategy over the MTEF period

PFA	Deliverable	MTEF-Target
1	Number of producers supported in the red meat, grain and citrus commodities	14
2	Number of veterinary certificates issued for export facilitation	49 300
	Number of export establishment audits conducted	465
	Number of activities supported to promote Western Cape agriculture and agribusiness	33
3	Number of hectares of cultivated land under Conservation Agriculture practises	2 400
4	Number of hectares of agricultural land rehabilitated	90 000
5	Number of research projects implemented to improve agricultural production	225
	Number of scientific papers published	60
	Number of research presentations made at peer reviewed events	105
	Number of research presentations made at technology transfer events	240
	Number of production economics studies conducted	195
	Number of on-site farm visits	11 400
	Number of farmers' days held	72
6	Number of web portals maintained	3
	Number of research infrastructure managed	7
7	Number of students graduated with agricultural qualification	240
	Number of participants trained in skills development programmes in the sector.	7 500
	Number of learners deemed competent in the vocational programmes to participate in the external integrated summative assessments (EISA)	90
	Number of smallholder producers supported	75
	Number of subsistence producers supported	280

As was indicated in Table 14, the WCDoA is leading PFA 2 and in Table 18 the list of PFA projects implemented in 2023 and 2024 can be found. Of these projects addressing the challenges in the Port of Cape Town and Market Access are considered to be flagship Projects. For 2025 one additional flagship project, the Decarbonisation of the Western Cape Economy, will be added as a third flagship.

Table 18: PFA 2 Projects

Project	Lead
Export regulatory reform	DEDAT
Export office system	WCDoA

Project	Lead
Integrated economics IQ to strengthen the export base	WCDaA
Addressing immediate and short-term Port of Cape Town challenges	DEDAT
Promote Western Cape Agricultural Exports into the African Continent	WCDaA
Support the Western Cape Agricultural Sector for Improved Market Access	WCDaA
Export Competitiveness Enhancement Programme	DEDAT
The Air Access Initiative	Wesgro
Using technology for enhanced matchmaking	Wesgro
Identifying and pursuing export opportunities in Africa	Wesgro
Establishing and promoting Western Cape brand for exports (incl. tourism)	Wesgro
Cruise Cape Town Initiative	Wesgro
Cape of Great Events	Wesgro
Advocacy and lobbying for export regulatory reform	DEDAT
Improved Western Cape exporter coordination - WC Export Forum	DEDAT
Developing and implementing export strategies and plans	DEDAT

3.7. Ministerial Priorities

Following his appointment as Minister of Agriculture, Economic Development and Tourism, Dr Ivan Meyer consulted widely to determine his priorities. At the first Cabinet Bosberaad of the new administration (10 – 12 July 2024), Dr Meyer's priorities were approved (see Figure 5).



Figure 5: Transversal area high-level outcome statements.

As Dr Meyer's portfolio includes two votes and several public entities, it speaks for itself that not all priorities will have equal importance for the WCDoA. For this reason, the WCDoA has developed outcomes and measurable indicators for each of the Ministerial priorities. This will form the basis of the Performance Agreement between the Minister and the HOD for this term. Still, the Ministerial priorities were taken into account when the Department's causality argument were developed in Section 8.2.7 of the SP.

3.8. Local government Priorities

To determine the local government priorities in the Western Cape, the most appropriate point of departure is the Integrated Development Plans (IDPs) of the various municipalities. A scrutiny of the IDPs at district level leads to priorities as summarised in Table 19.

Table 19: Strategic focus areas of the Metro and various districts in the Western Cape.

SF	CITY OF CAPE TOWN	WEST COAST	CAPE WINELANDS	OVERBERG	GARDEN ROUTE	CENTRAL KAROO
1	Economic growth	Social wellbeing, safety and health	Financial management	Efficient basic services.	Growing inclusive economy.	Facilitate good governance.
2	Basic services	Regional economic growth	Good governance	Regional economic development	Bulk infrastructure coordination.	Build a well capacitated workforce.
3	Housing	Coordinate development	Sustainable infrastructure and transport to	Municipal transformation and	Sustainable environment and safety	Improve/maintain district roads.

SF	CITY OF CAPE TOWN	WEST COAST	CAPE WINELANDS	OVERBERG	GARDEN ROUTE	CENTRAL KAROO
		ent of bulk/essential services and transport	enable economic opportunities.	institutional development .		
4	Safety	Foster relationships	Clean healthy and safe living environment	Financial viability.	A skilled workforce and communities	Prevent/minimise possible disasters
5	Transport	Maintain financial viability and good governance.	Skilled workforce	Good governance	Financial viability and sustainability.	Promote safe, healthy socially stable communities.
6	Public space environment & amenities		Facilitate partnerships that cultivate economic growth.		Good governance.	Promote regional economic development and tourism.
7					Healthy and socially stable communities	Deliver sound and effective administration and financial service

Based on this, some recurring themes emerged from the various focus areas. These are:

- a) Economic growth / development
- b) Bulk/essential services and transport
- c) Skills development
- d) Good governance
- e) Good financial management / viability
- f) Healthy and stable communities

In addition, it is also important to take note of the resolutions taken during the Strategic Integrated Municipal Engagements which took place from 18 to 28 November 2024. During these meetings a total of 57 resolutions were taken and following scrutiny these could be clustered in five themes (See Table 20).

Table 20: Sime resolutions clustered by theme.

DISTRICT	TOTAL	THEMES				
		ECONOMIC GROWTH & INFRASTRUCTURE	GOVERNANCE & IGR	INSTITUTIONAL CAPACITY & FINANCE	COMMUNITY & SOCIAL DEVELOPMENT	ENVIRONMENTAL
West Coast	13	4	3	4	-	2
Cape Winelands	12	3	-	2	7	-
Overberg	10	1	1	2	4	2
Garden Route	8	-	-	3	4	1
Central Karoo	14	2	4	2	6	-
Total	57	10	8	13	21	5

Note: The Cape Metropole was not part of the Sime process.

Although the discussions of the SIME engagements were supposed to be at a more strategic level, very few of the resolutions were of such a nature. Of the 57 resolutions only two were directly addressed to the WCDoA and these were:

- a) Cape Winelands: Request for vacant land for farming. However, the WCDoA does not own any land and is also not allowed to spend any money on acquiring land. This request has been referred to the Department of Agriculture, Land Reform and Rural Development for further attention.
- b) Central Karoo: Agricultural opportunities for the youth: It is noted that the youth in the District is not taking up the opportunities offered by the WCDoA and the Department is requested to increase its awareness and marketing drives.

Although not directly addressed to the Department, in the case of a number of the other resolutions the WCDoA can play a role or the Agricultural Sector also have an interest. These resolutions focussed on:

- a) Unlocking economic opportunities.
- b) Infrastructure investment
- c) Skills development
- d) Water resilience
- e) Carbon credits
- f) Farm and neighbourhood watches as well as fighting crime

4. Relevant Court Rulings

There are no recent court rulings with an impact on the strategies and activities of the Department.

Part B: Our Strategic Focus

5. Vision

An inclusive, responsive and prosperous agricultural sector in balance with nature.

6. Mission

Unlocking the potential of the agricultural value chain to grow the economic, ecological and social wellbeing of all the people of the Western Cape through:

- Encouraging sound stakeholder engagements;
- Promoting the ethical production of affordable, nutritious, safe and accessible food, fibre and agricultural products;
- Promoting production of affordable and safe products;
- Facilitating investment into the agricultural sector;
- Supporting sustainable management of natural resources;
- Executing cutting edge, innovative and relevant research and technology development;
- Developing, retaining and attracting skills and human capital;
- Providing a competent and professional advisory service;
- Enhancing market access for the entire agricultural sector;
- Contributing towards alleviation of poverty and hunger;
- Ensuring transparent and effective governance;
- Promoting human, animal, plant and environmental health and wellbeing; and
- Promoting safety and sustainable development in rural areas

7. Values

Caring:	We care for those we serve and work with.
Competence:	We will ensure that we have the ability and capability to do the job we were employed to do.
Accountability:	We take responsibility.
Integrity:	We will be honest and do the right thing.
Innovation:	We will be open to new ideas and develop creative solutions to problems in a resourceful way.
Responsiveness:	We will serve the needs of our citizens and employees.

8. Situational Analysis

It was argued in the introductory part of Section 3 of this Strategic Plan that the policy and strategy environment of the WCDoA stretches from the international to the local sphere of its environment. The same argument applies to the situational environment of the Department. In the next section, the external environment of the Department will be analysed and specific emphasis will be placed on the Strengths, Weaknesses, Opportunities and Threats (SWOT) of the Department. As part of the SWOT analysis, the 22 evaluations the Department has concluded over the past number of years will be discussed. The relevant sector statistics and the spatial distribution of production will be addressed and it is evident that the challenges and risks to be faced will have to receive attention.

During the analysis of the internal environment, specific attention will be given to the capacity of the WCDoA to deliver on its mandate from the perspective of both human, information technology and financial resources. This will include the Department's compliance pertaining to Broad Based Black Economic Empowerment (B-BBEE) as well as the attention given to vulnerable groups such as women, children and people with disabilities.

8.1. External Environment Analysis

8.1.1. SWOT Analysis

In the Framework for Strategic and Annual Performance Plans, released by the Department of Planning, Monitoring and Evaluation (DPME), a number of planning tools were suggested when developing a Strategic Plan (SP). One of these was a SWOT analysis and another was the development of a Theory of Change (TOC). It was also mentioned that the process of developing the SWOT and TOC might be more important than the actual result itself.

To this end the Department commissioned the Palmer Development Group (PDG) and Blue North Sustainability (Blue North) to conduct the strategic SWOT Analysis. The project included the following key elements:

- a) Surveying internal and external stakeholders on their views of the Departments internal (strengths and weaknesses) and external environments (opportunities and threats).
- b) Reviewing the evaluation reports of the evaluations conducted by the WCDoA since the commencement of the current Strategic Plan and identifying those findings raised in each evaluation that are relevant to the SWOT analysis;
- c) Combining the results from this review with the database and report generated as part of the 2019 review of the 22 evaluations undertaken between 2014 and 2018.
- d) Reviewing the quarterly external environment analysis conducted by BFAP and commissioned by the Department.
- e) Synthesising the findings from these different sources within a clear and comprehensive strategic SWOT analysis of the Department.

The information gathering from the primary information sources for the SWOT (surveys, evaluations review and focus group/qualitative output) sought to shed light on features of the Department's internal and external environments according the conceptual model in (see **Error! Reference source not found.**). The "internal environment" refers to the internal features/characteristics of the Department that are within the control of the Department - these inform the Strengths and Weaknesses of the SWOT analysis. The "micro environment" refers to those aspects external to the Department but closely linked to the Department and more strongly within the Department's sphere of influence – these in part inform the Opportunities and Threats of the SWOT analysis. The "macro environment" also refers to the external environment but includes those external features that impact the Department and its Stakeholders but over which the Department exerts limited or no influence – these further inform the Opportunities and Threats of the SWOT analysis.

While each information source provided insights and perspectives relevant to the SWOT it was critical to distil these into a final strategic SWOT at a level of detail to be of use to the Department's strategic planning processes. A two-step process was therefore followed whereby the findings derived from each information source were first synthesised into key observations relevant to the SWOT, followed by a second step whereby these key observations were further synthesised into a final set of strategic strengths, weaknesses, opportunities and threats deemed to be of specific relevance to the Department's strategic planning processes. Each of the final SWOT elements were summarised and "considerations for strategy" highlighted for each. This two-step synthesis process is summarised in Figure 6: **SWOT conceptual model.**

The SWOT analysis was undertaken over the period May to July 2024, with primary data collected mostly in May and early June. It should be noted that this was the period before and immediately after South Africa's 2024 national and provincial elections, which gave rise to a significantly changed political landscape, especially at national level. Findings related to political, policy and intergovernmental factors should be viewed in light of this.

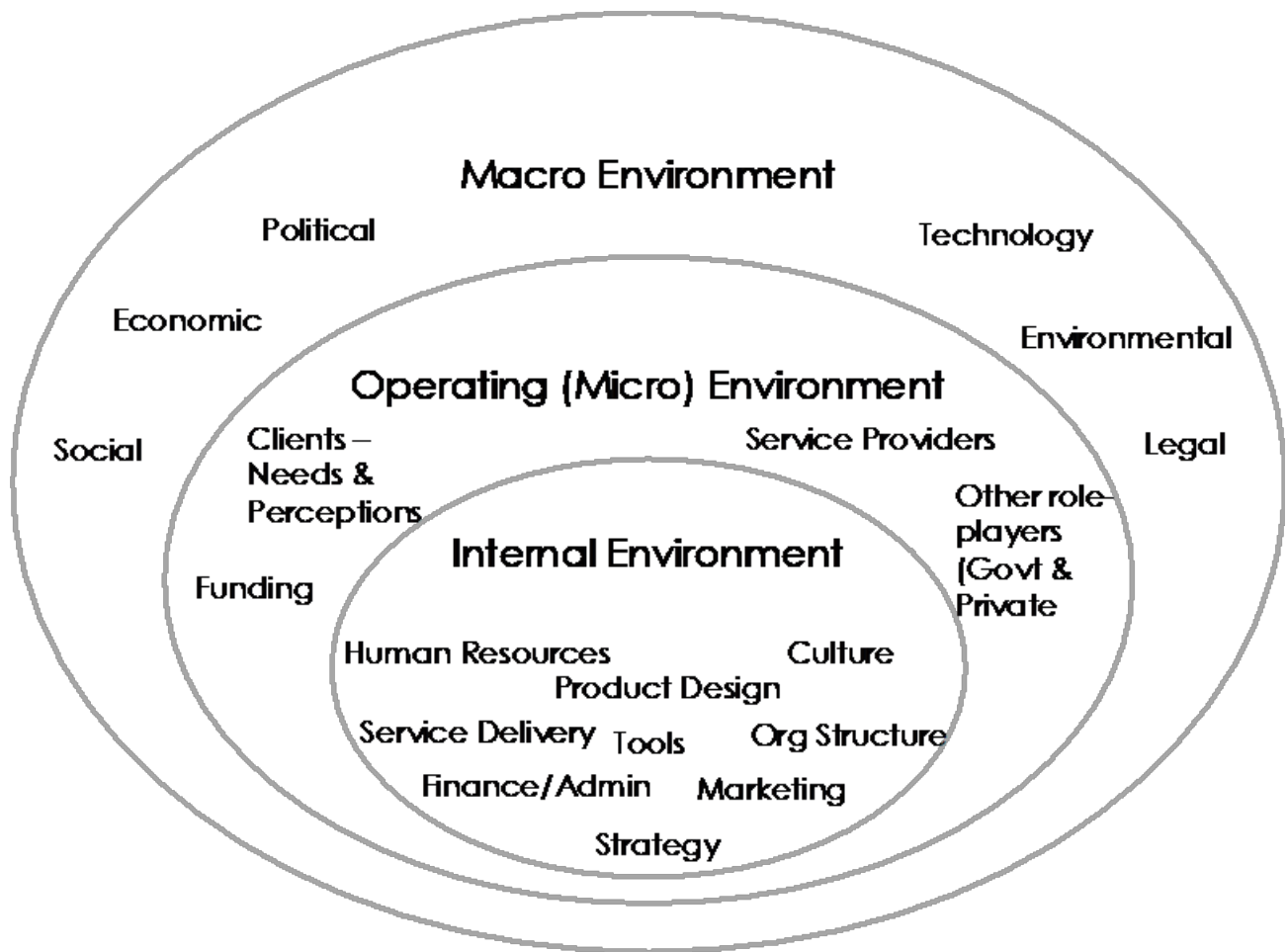


Figure 6: SWOT conceptual model.

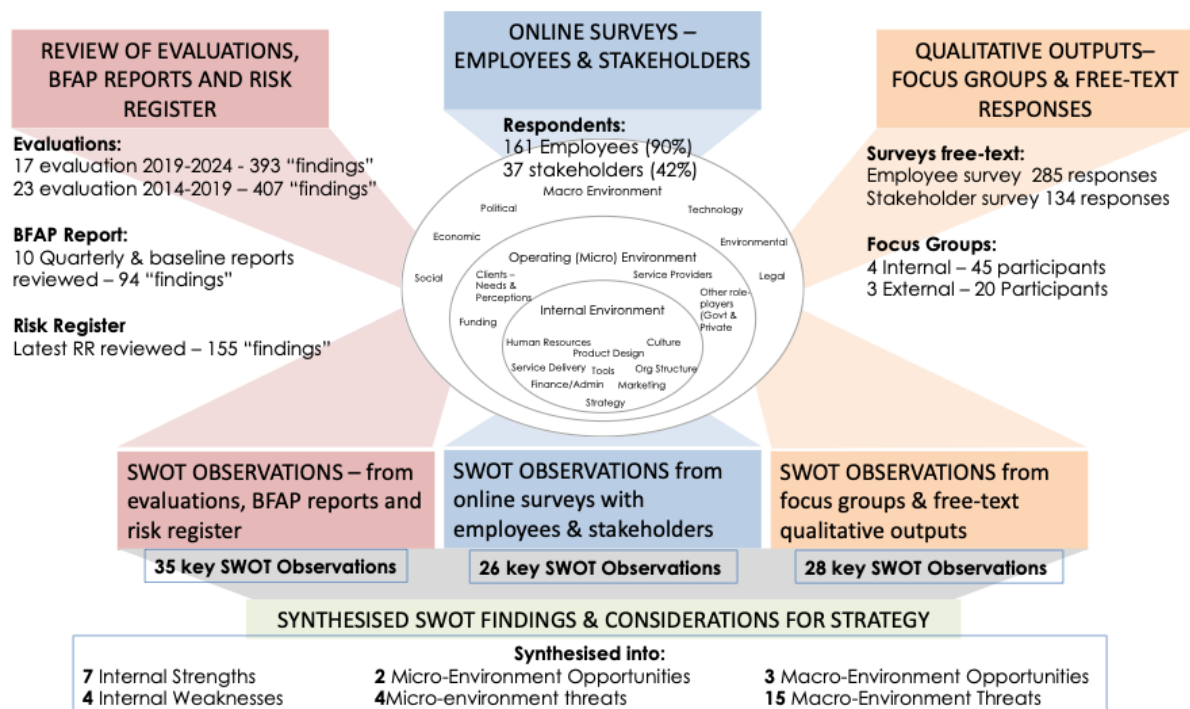


Figure 7: Process to gather, review and synthesise findings to a final strategic SWOT for the WCDoA.

The consultations on the SWOT results took place from late July to late August 2024. By this time, Departmental stakeholders had the benefit of greater clarity on the new political dispensation (i.e. Government of National Unity at national level and confirmation of the ruling party at provincial level). This was factored in and should continue to be factored in, to any discussion of the implications of these results for Departmental strategy.

Output from the three SWOT data sources.

The first of the three primary sources³⁶ of information for the SWOT was derived from an online survey conducted both internally within the Department and externally with stakeholders to the Department.

The two surveys provide both “insider” and “outsider” perspectives of the Department’s internal and external environments. Survey respondents were asked to consider a set of statements about the Department’s internal and external environments and indicate their degree of agreement or disagreement with the statement (Scored as: Strongly disagree = -2, Disagree = -1, Neutral = 0, Agree = +1, Strongly Agree = +2).

Space was also provided for respondents to provide free-text input to the survey. This free-text capability allowed respondents to comment on aspects of the Department’s internal and/or external environments beyond the strictures of the question structure and scoring format of the rest of the survey. Therefore these free-text responses provided valuable additional insight and emphasis to respondents’ views on specific aspects of the Department’s internal and/or external environments. The free text responses are reported on quantitatively in this section and qualitatively in the last section of this chapter.

There were a total of 161 respondents (90% response rate) to the internal survey and those who do not have email addresses were represented through focus groups (see below). There were 37 respondents (42% response rate out of the invited 88 individuals) to the external survey. The external respondents were identified using the Department’s existing stakeholder list. They represented national, provincial and local government (11 respondents), statutory bodies (4 respondents), organised agriculture and industry bodies (19 respondents) and private agricultural companies (3 respondents). It is important to note that the external participants were selected on the basis that they were able to provide strategic insights on behalf of the organisations and stakeholders they represented. The views of the larger population of agricultural producers were factored in by giving consideration in the SWOT synthesis to the recently conducted evaluation of farmers’ needs (2023).

26 key observations relevant to the SWOT were derived from the online surveys.

Online survey: Internal Environment

Table 21 and Table 22 present the ratings per statement from the employee and stakeholder perspectives respectively. The negative scores (red bars) are the total of the scores that indicate a weakness in a particular aspect or feature of the Department’s internal environment, while the positive scores (the green bars) are the total scores that indicate a strength in a particular aspect or feature of the Department’s internal environment³⁷. In every case, a feature shows a proportion of the scoring indicating it as a weakness and a proportion indicating it as a strength. This may seem contradictory – how can, for example, “Sufficiency of Human Resources” be both a strength and a weakness? – However, it is merely reflective of the range of opinions of the individuals who participated in the survey.

³⁶ It is important to note that although these results are presented first, they were not given special priority; all three sources of primary data were considered on their merits in the second-step synthesis.

³⁷ Note that the survey results, in line with the Terms of Reference, were analysed in aggregate considering the Department as a whole rather than at a programme level. The data exists for this more detailed analysis to be done. The full, anonymised dataset will be submitted to the Department at conclusion of the project. Also important to note is that the surveys represent only one of the data sources utilised in arriving at the overall SWOT for the Department.

Table 21: Online survey ratings scoring the internal environment: Employee perspective.

Aspect of WCDOA INTERNAL Environment	Weakness	Strength	Total Score
Compiling & sharing of needed information	-28	177	149
Effectiveness of Marketing of Services	-29	167	138
Effectiveness of Administration & Project-management	-22	143	121
Effectiveness/clarity of the Department's Strategy & Strategic Objectives	-28	145	119
Suitability of Technologies & IT Tools	-35	152	117
Data collection for Monitoring & Evaluation	-28	125	97
Facilitating multi-party collaboration	-27	123	96
Suitability of Infrastructure, Assets & Equipment	-42	138	96
Effectiveness of the Department's Organisational Structure	-59	101	42
Effectiveness of the Department's Organisational Culture	-63	97	34
Sufficiency of Human Resources (quantity & quality)	-121	74	(47)
Sufficiency of Financial resources/budgets	-120	60	(60)

Table 22: Online survey ratings scoring the internal environment: Stakeholder perspective.

Aspect of WCDOA INTERNAL Environment	Weakness	Strength	Total Score
Effectiveness of the Department's Organisational Culture	-11	45	44
Effectiveness/clarity of the Department's Strategy & Strategic Objectives	-3	46	41
Effectiveness of Administration & Project-management	-3	40	37
Compiling & sharing of needed information	-7	41	34
Facilitating multi-party collaboration	-4	37	33
Effectiveness of the Department's Organisational Structure	-3	34	31
Effectiveness of Marketing of Services	-4	33	29
Suitability of Technologies & IT Tools	-3	29	26
Data collection for Monitoring & Evaluation	-2	27	25
Suitability of Infrastructure, Assets & Equipment	-4	27	23
Sufficiency of Financial resources/budgets	-7	21	15
Sufficiency of Human Resources (quantity & quality)	-9	23	14

Reporting the results in this way also allows the ratings of the different features of the internal environment to be ranked by totalling the positive and negative scores per feature and then sorting the tables from lowest to highest total score. This reflects the balance between those regarding the feature as a weakness and those regarding it as a strength – the greater the negative score in relation to the positive score the lower the total score and the more the feature indicates as being relatively weaker.

Table 23 shows the features of the internal environment ranked from highest (relatively strongest) to lowest (relatively weakest) total score based on the Department's own ratings of its internal environment. This ranking is then compared to the Stakeholder's rankings of the same features of the internal environment. It is clear that external and internal perspectives differ as to the ranking of the Departments relative strengths and weaknesses – this will be discussed in more detail in the "observations" section below.

Table 23: Comparing employee and stakeholder ranking of the Department's internal environment.

Aspect of WCDOA INTERNAL Environment	DEPARTMENT'S RANKING	STAKEHOLDER'S RANKING
Compiling & sharing of needed information	1	4
Effectiveness of Marketing of Services	2	7
Effectiveness of Administration & Project-management	3	3
Effectiveness/clarity of the Department's Strategy & Strategic Objectives	4	2
Suitability of Technologies & IT Tools	5	8
Data collection for Monitoring & Evaluation	6	9
Facilitating multi-party collaboration	7	5
Suitability of Infrastructure, Assets & Equipment	7	10
Effectiveness of the Department's Organisational Structure	9	6
Effectiveness of the Department's Organisational Culture	10	1
Sufficiency of Human Resources (quantity & quality)	11	12
Sufficiency of Financial resources/budgets	12	11

The free-text responses were categorised as indicating something positive or negative and then categorised according to which feature of the internal environment they spoke to. A quantitative

analysis of the free-text responses is presented in Table 24 and Table 25. The number of times free-text responses per feature of the internal environment and whether indicating a weakness (red bar) or strength (green bar) is shown for the employees and stakeholder surveys respectively. This quantitative analysis is valuable in showing where respondents felt compelled to raise additional insights and issues and serves to emphasise the importance of specific aspects. The free-text responses are qualitatively evaluated in the final section.

Table 24: Summary of free text comments of the internal environment: employee perspective.

Aspect of WCDOA INTERNAL Environment	Weakness	Strength	Total Score
Data & Information Management	0	5	5
Effectiveness & Impact of Programmes/Products/Services	0	3	3
Design of Programme/Product/Service	0	2	2
Managing Collaborations & Networks	-4	6	2
Infrastructure - Management & Suitability	-2	1	(1)
Marketing & Communication	-1	0	(1)
Strategy & Policy	-1	0	(1)
Technology - Management & Use	-3	1	(2)
Financial Management & Resources	-5	0	(5)
Administration, Controls & Record Keeping	-7	0	(7)
Organisational alignment & Effectiveness	-14	4	(10)
Performance Culture	-27	14	(13)
Human Resources	-43	18	(25)

Table 25: Summary of free text comments of the internal environment: stakeholder perspective.

Aspect of WCDOA INTERNAL Environment	Weakness	Strength	Total Score
Managing Collaborations & Networks	0	12	12
Effectiveness & Impact of Programmes/Products/Services	0	4	4
Human Resources	-1	3	2
Organisational alignment & Effectiveness	-2	2	0
Marketing & Communication	-1	0	(1)
Technology - Management & Use	-1	0	(1)
Design of Programme/Product/Service	-6	4	(2)
Financial Management & Resources	-2	0	(2)

Online surveys following largely the same structure were conducted with employees and stakeholders in 2019. The surveys of both internal and external perspectives reveal different rankings for the two different time periods. Table 26 and Table 27 show the differences between the two surveys periods in weaknesses and strengths arising through the surveys for employees and stakeholders respectively.

Table 26: Comparing WCDoA's internal environment 2019 – 2024: Employee perspective.

Aspect of WCDOA INTERNAL Environment	2019 DEPARTMENT'S RANKING	2024 DEPARTMENT'S RANKING	Change
Compiling & sharing of needed information	1	1	0
Effectiveness of Marketing of Services	8	2	6
Effectiveness of Administration & Project management	6	3	3
Effectiveness/clarity of the Department's Strategy & Strategic Objectives	2	4	-2
Suitability of Technologies & IT Tools	4	5	-1
Data collection for Monitoring & Evaluation	7	6	1
Facilitating multi party collaboration	5	7	-2
Suitability of Infrastructure, Assets & Equipment	3	7	-4
Effectiveness of the Department's Organisational Structure	10	9	1
Effectiveness of the Department's Organisational Culture	11	10	1
Sufficiency of Human Resources (quantity & quality)	12	11	1
Sufficiency of Financial resources/budgets	9	12	-3

Table 27: Comparing WCDOA's internal environment 2019 – 2024: Stakeholder perspective.

Aspect of WCDOA INTERNAL Environment	2019 STAKEHOLDER RANKING	2024 STAKEHOLDER RANKING	Change
Effectiveness of the Department's Organisational Culture	9	1	8
Effectiveness/clarity of the Department's Strategy & Strategic Objectives	2	2	0
Effectiveness of Administration & Project-management	1	3	-2
Compiling & sharing of needed information	3	4	-1
Facilitating multi-party collaboration	9	5	4
Effectiveness of the Department's Organisational Structure	6	6	0
Effectiveness of Marketing of Services	6	7	-1
Suitability of Technologies & IT Tools	8	8	0
Data collection for Monitoring & Evaluation	3	9	-6
Suitability of Infrastructure, Assets & Equipment	5	10	-5
Sufficiency of Financial resources/budgets	12	11	1
Sufficiency of Human Resources (quantity & quality)	11	12	-1

Observations from the Internal Environment Survey

Based on the survey output examining the Department's internal environment presented above, a number of observations relevant to the SWOT Analysis can be made:

- a) Only two elements rated by employees - the sufficiency of human resource and sufficiency of finances/budgets - have distinctly more negative scores than positive scores. This points to these two elements being regarded by employees as distinct internal weaknesses.
- b) The ratings of the remaining elements by both survey groups show a greater positive than negative score, with the positive score in most cases being substantially higher than the corresponding negative score. This overwhelmingly positive scoring is more pronounced in the survey completed by stakeholders. This generally positive pattern across both survey groups points to the overall healthy functioning of the Department.
- c) The comparative ranking table shows that the Stakeholders perceive certain of the features of the Department in a more positive light (strengths) compared to the Department's own staff. The external stakeholders were distinctly more positive regarding the Department's organisational culture and the effectiveness of the Department's organisational structure (i.e. rating these as strengths). It should however be recognised that these are by definition *internal* factors. External stakeholders do not have first-hand, day-to-day experience of these two factors. This is one data point, which in the methodology employed for the SWOT was considered against other data points to arrive at the final synthesis of SWOT observations.
- d) However, stakeholders rate the effectiveness of the Department's marketing of its services as distinctly weaker than the rating of the Department employees.
- e) It is clear that many employee and stakeholder respondents utilised the opportunity provided in the free-text component of the survey to provide deeper insight to specific aspects of the Department's internal environment. For the employee free text responses the following stand out:
 - a. Three elements of the Department's internal environment attracted the most negative free-text comments (indicating weaknesses):
 - i. Organisational structure (alignment & effectiveness),
 - ii. the organisational culture and;
 - iii. human resources.
 - b. Two elements attracted the most positive comments (indicating strengths):
 - i. the compiling and sharing of needed information and;
 - ii. the effectiveness of project administration and management.
- f) For stakeholder free text responses the following stand out:
 - a. Two elements attracted the most positive comments (indicating strengths):
 - i. the management of collaborations and networks and;
 - ii. the effectiveness and impact of programmes/services.

- g) When examining the changes in ratings between the 2019 and 2024 surveys, the following key changes in ratings by employees are notable:
- Two elements were ranked much higher (i.e. as strengths, relatively):
 - the effectiveness of the marketing of services and;
 - the effectiveness of project administration and management.
 - Two elements are ranked much lower (i.e. as weaknesses, relatively):
 - the sufficiency of financial resources/budgets and;
 - the suitability of infrastructure, assets and equipment.
- h) When examining the changes in ratings between the 2019 and 2024 surveys, the following key changes in ratings by stakeholders are notable:
- Two elements were ranked much higher (i.e. as strengths, relatively):
 - the effectiveness of the organisational culture and;
 - facilitating multi-party collaborations.
 - Two elements are ranked much lower (i.e. as weaknesses, relatively):
 - the collection of data for monitoring and evaluation purposes and;
 - the suitability of infrastructure, assets and equipment.

Online survey: Micro and Macro Environment

Table 28 and Table 29 present the ratings per statement from employees and stakeholder perspectives respectively. The negative scores (red bars) are the total of the scores that indicate a weakness in a particular aspect of the Department's internal environment, while the positive scores (the green bars) are the total scores that indicate a strength in a particular aspect of the Department's internal environment. In every case, a feature shows a proportion of the scoring indicating it as a weakness, and a proportion indicating it as a strength. This may seem contradictory but it is merely reflective of the range of opinions of the individuals who participated in the survey.

Reporting the results in this way also allows the ratings of the different features of the external environment to be ranked by totalling the positive and negative scores per feature and then sorting the tables from lowest to highest total score. This reflects the balance between those regarding the feature as a threat and those regarding it as an opportunity – the greater the negative score in relation to the positive score the lower the total score and the more the feature indicates as being relatively more of a threat. Conversely, the greater the positive score in relation to the negative score the higher the total score and the more the feature indicates as being relatively more of an opportunity.

Table 28: External Environment: Employee Perspective.

Aspect of WCDOA MICRO Environment	Threat	Opportunity	Total Score
Willingness of Private sector and NGO role players to collaborate	-7	160	156
Department's Reputation with Stakeholders in Sector	-19	156	138
Collaboration with other National & Provincial Departments	-13	139	131
Client's clarity on their needs/priorities	-24	126	104
Availability of Suppliers & Service Providers	-46	101	59
Sufficiency of Funding from National & Provincial Government	-43	88	51

Aspect of WCDOA MACRO Environment	Threat	Opportunity	Total Score
Impacts of New Technologies on competitiveness of Sector	-4	182	189
Governance in the W.Cape	-18	164	153
Willingness of Private Sector to invest in Sector	-10	134	132
General access of populous to the internet and computer technologies	-52	96	57
Natural Resources availability impacts on Sector (water, soil, biodiversity etc.)	-73	79	23
Education & Skills levels impacts on Sector	-93	60	(19)
Attractiveness of Sector to Young people	-98	57	(25)
Impact of New Technologies on employment in the Sector	-93	42	(39)
Stability/sufficiency of Trade Agreements	-109	9	(91)
Population Growth & Urbanisation impacts on Food Security	-135	28	(92)
Impact of Regulatory Environment on Sector	-129	13	(106)
Impact of energy supply on the sector	-177	17	(140)
National Government Policy	-156	9	(141)
Sufficiency of key infrastructure	-185	14	(152)
Vulnerability of Sector to Climate Change	-219	13	(188)

Table 29: External Environment: Stakeholder Perspective.

Aspect of WCDOA MICRO Environment	Threat	Opportunity	Total Score
Department's Reputation with Stakeholders in Sector	-1	54	57
Willingness of Private sector and NGO role players to collaborate	0	44	46
Collaboration with other National & Provincial Departments	0	40	45
Client's clarity on their needs/priorities	-1	38	38
Availability of Suppliers & Service Providers	1	32	36
Sufficiency of Funding from National & Provincial Government	-2	23	25

Aspect of WCDOA MACRO Environment	Threat	Opportunity	Total Score
Impacts of New Technologies on competitiveness of Sector	0	54	65
Governance in the W.Cape	-1	55	61
Willingness of Private Sector to invest in Sector	-2	45	51
General access of populous to the internet and computer technologies	-10	22	25
Natural Resources availability impacts on Sector (water, soil, biodiversity etc.)	-24	19	12
Attractiveness of Sector to Young people	-26	14	4
Impact of New Technologies on employment in the Sector	-23	6	(5)
Education & Skills levels impacts on Sector	-28	7	(7)
Population Growth & Urbanisation impacts on Food Security	-30	7	(8)
Stability/sufficiency of Trade Agreements	-37	8	(20)
Impact of Regulatory Environment on Sector	-36	6	(20)
National Government Policy	-50	4	(40)
Vulnerability of Sector to Climate Change	-42	2	(42)
Sufficiency of key infrastructure	-63	2	(42)
Impact of energy supply on the sector	-65	2	(43)

Table 30 shows the features of the external environment (Micro and Macro) ranked relatively from aspects rated as greatest opportunity to greatest threat based on the Department's own ratings of its internal environment. This ranking is then compared to the Stakeholder's rankings of the same features of the external environment. It is clear that external and internal perspectives differ as to the ranking of the Department's relative opportunities and threats – this will be discussed in more detail in the “observations” section below.

Table 30: External Environment: Comparing Employee and Stakeholder Perspectives.

Aspect of WCDOA MICRO Environment	DEPARTMENT'S RANKING	STAKEHOLDER'S RANKING
Willingness of Private sector and NGO role players to collaborate	1	2
Department's Reputation with Stakeholders in Sector	2	1
Collaboration with other National & Provincial Departments	3	3
Client's clarity on their needs/priorities	4	4
Availability of Suppliers & Service Providers	5	5
Sufficiency of Funding from National & Provincial Government	6	6

Aspect of WCDOA MACRO Environment	DEPARTMENT'S RANKING	STAKEHOLDER'S RANKING
Impacts of New Technologies on competitiveness of Sector	1	1
Governance in the W.Cape	2	2
Willingness of Private Sector to invest in Sector	3	3
General access of populous to the internet and computer technologies	4	4
Natural Resources availability impacts on Sector (water, soil, biodiversity etc.)	5	5
Education & Skills levels impacts on Sector	6	8
Attractiveness of Sector to Young people	7	6
Impact of New Technologies on employment in the Sector	8	7
Stability/sufficiency of Trade Agreements	9	10
Population Growth & Urbanisation impacts on Food Security	10	9
Impact of Regulatory Environment on Sector	11	10
Impact of energy supply on the sector	12	15
National Government Policy	13	12
Sufficiency of key infrastructure	14	13
Vulnerability of Sector to Climate Change	15	13

The free-text responses were categorised as indicating something positive or negative and then categorised according to which feature of the external environment they spoke to. A quantitative analysis of the free-text responses is presented in Table 31 and Table 32. The number of times free-text responses per feature of the external environment and whether indicating a weakness (red bar) or strength (green bar) is shown for the employees and stakeholder surveys respectively. This quantitative analysis is valuable in showing where respondents felt compelled to raise additional insights and issues and serves to emphasise the importance of specific aspects.

Table 31: Free text comments on External Environment: Employee Perspective.

Free text responses relating to WCDOA MICRO Environment	Weakness	Strength	Total Score
NGO's, Private Sector and other Role Players	-6	15	9
Managing Collaborations & Networks	0	3	3
Suppliers & Service Providers	0	1	1
Market/Client Needs & Perceptions	-7	3	(4)
Government (National & Provincial) Alignment/Coordination	-7	2	(5)
Government Funding	-12	4	(8)

Free text responses relating to WCDOA MACRO Environment	Weakness	Strength	Total Score
Economic: Private Sector investment	0	3	3
Economic: Employment levels/opportunities	-1	2	1
Technology: Emerging Technologies	-1	1	0
Economic: Economic Growth/Trade	-10	9	(1)
Political: National Government Policy/Targets	-1	0	(1)
Social: Education / Skills levels	-1	0	(1)
Social: Food security	-1	0	(1)
Social: Population Health	-1	0	(1)
Government (National & Provincial) Alignment/Coordination	-2	0	(2)
Economic: Legal/Regulatory/Compliance environment	-4	1	(3)
Environmental: Climate Change	-3	0	(3)
Environmental: Resource availability	-7	0	(7)
Political: Political Stability / Governance	-12	3	(9)

Table 32: Free text comments on External Environment: Stakeholder Perspective.

Free text responses relating to WCDOA MICRO Environment	Weakness	Strength	Total Score
NGO's, Private Sector and other Role Players	-1	10	9
Government Funding	-4	4	0
Market/Client Needs & Perceptions	-2	2	0
Broader market acceptance/reputation	-2	0	(2)
Government (National & Provincial) Alignment/Coordination	-6	3	(3)

Free text responses relating to WCDOA MACRO Environment	Weakness	Strength	Total Score
Economic: Economic Growth/Trade	-5	11	6
Economic: Private Sector investment	0	2	2
Social: Education / Skills levels	-1	2	1
Technology: Access to Technologies/Networks	0	1	1
Technology: Emerging Technologies	-1	2	1
Economic: Employment levels/opportunities	-1	1	0
Political: National Government Policy/Targets	-1	1	0
Social: Community health (social fabric)	-1	1	0
Environmental: Climate Change	-1	0	(1)
Social: Population interests/aspirations	-1	0	(1)
Political: Political Stability / Governance	-2	0	(2)
Political: Trust in Government	-2	0	(2)
Environmental: Resource availability	-6	1	(5)
Political: Service Delivery & Infrastructure	-8	1	(7)
Economic: Legal/Regulatory/Compliance environment	-8	0	(8)

An online survey following largely the same structure was conducted with employees and stakeholders in 2019. The surveys of both internal and external perspectives reveal different rankings for the two different time periods. Table 33 and Table 34 show the differences between the two survey periods in opportunities and threats arising through the surveys for employees and stakeholders respectively. It is important to note that two "aspects" were added to the survey of the macro environment in 2024, sufficiency of energy supply and sufficiency of infrastructure.

Table 33: Comparing 2019 and 2024 response on External Environment: Employee Perspective.

Aspect of WCDOA MICRO Environment	2019 DEPARTMENT'S RANKING	2024 DEPARTMENT'S RANKING	Change
Willingness of Private sector and NGO role players to collaborate	2	1	1
Department's Reputation with Stakeholders in Sector	1	2	-1
Collaboration with other National & Provincial Departments	3	3	0
Client's clarity on their needs/priorities	4	4	0
Availability of Suppliers & Service Providers	5	5	0
Sufficiency of Funding from National & Provincial Government	6	6	0
Aspect of WCDOA MACRO Environment	2019 DEPARTMENT'S RANKING	2024 DEPARTMENT'S RANKING	Change
Impacts of New Technologies on competitiveness of Sector	1	1	0
Governance in the W.Cape	2	2	0
Willingness of Private Sector to invest in Sector	3	3	0
General access of populous to the internet and computer technologies	4	4	0
Natural Resources availability impacts on Sector (water, soil, biodiversity etc.)	5	5	0
Education & Skills levels impacts on Sector	8	6	2
Attractiveness of Sector to Young people	7	7	0
Impact of New Technologies on employment in the Sector	10	8	2
Stability/sufficiency of Trade Agreements	6	9	-3
Population Growth & Urbanisation impacts on Food Security	12	10	2
Impact of Regulatory Environment on Sector	9	11	-2
Impact of energy supply on the sector		12	
National Government Policy	11	13	-2
Sufficiency of key infrastructure		14	
Vulnerability of Sector to Climate Change	13	15	-2

Table 34: Comparing 2019 and 2024 response on External Environment: Stakeholder Perspective.

Aspect of WCDOA MICRO Environment	2019 STAKEHOLDER RANKING	2024 STAKEHOLDER RANKING	Change
Department's Reputation with Stakeholders in Sector	2	1	1
Willingness of Private sector and NGO role players to collaborate	4	2	2
Collaboration with other National & Provincial Departments	5	3	2
Client's clarity on their needs/priorities	1	4	-3
Availability of Suppliers & Service Providers	3	5	-2
Sufficiency of Funding from National & Provincial Government	6	6	0
Aspect of WCDOA MACRO Environment	2019 STAKEHOLDER RANKING	2024 STAKEHOLDER RANKING	Change
Impacts of New Technologies on competitiveness of Sector	1	1	0
Governance in the W.Cape	2	2	0
Willingness of Private Sector to invest in Sector	3	3	0
General access of populous to the internet and computer technologies	4	4	0
Natural Resources availability impacts on Sector (water, soil, biodiversity etc.)	5	5	0
Attractiveness of Sector to Young people	7	6	1
Impact of New Technologies on employment in the Sector	6	7	-1
Education & Skills levels impacts on Sector	7	8	-1
Population Growth & Urbanisation impacts on Food Security	9	9	0
Stability/sufficiency of Trade Agreements	10	10	0
Impact of Regulatory Environment on Sector	11	10	1
National Government Policy	12	12	0
Vulnerability of Sector to Climate Change	13	13	0
Sufficiency of key infrastructure		13	
Impact of energy supply on the sector		15	

Observations from the Micro and Macro Environment Survey

- The results for both surveys of the external environment show a far more distinct differentiation between features (as either a distinct opportunity or threat) than that shown for the internal environment. This points to far greater consensus across all respondents as to their ratings and identification of features of the external environment as threats or opportunities.
- Departmental employees identify climate change, sufficiency of infrastructure, the impact of National Government Policy and sufficiency of energy supply as the top four threats.
- Furthermore, employees identify new technology in agriculture, the willingness of Private sector and NGO role players to collaborate with the Department, the Department's reputation in the sector and governance in the Western Cape as the four largest opportunities.
- Stakeholders on the other hand, identify sufficiency of energy supply, sufficiency of key infrastructure, climate change and national government policy as the top four threats,

- e) Furthermore, stakeholders identify new technologies in agriculture, the role of the Department in the sector, and the willingness of the Private sector to invest as the four largest opportunities.
- f) The free-text responses derived from both sources shed further light on the threats and opportunities faced by the Department. In terms of the number of comments raised:
 - a. Employees highlighted:
 - i. collaboration (or lack thereof) with other government departments (locally and nationally),
 - ii. sufficiency of funding for the department, natural resource availability and;
 - iii. national government policy as threats.
 - b. Stakeholder free-text responses highlighted threats related to
 - i. collaboration with other government departments,
 - ii. natural resource availability, the impact of the regulatory environment;
 - iii. and national government policy.
 - c. Employees highlight opportunities related to
 - i. private sector and NGO collaboration and;
 - ii. the willingness of the private sector to invest.
 - d. Stakeholder highlight opportunities related to
 - i. private sector and NGO collaboration and;
 - ii. the stability/sufficiency of trade agreements.
- g) The comparative ranking table shows that the Stakeholders perceive energy security as the greatest threat as compared to the employees rating climate change as the highest ranked threat.
- h) The rest of the rankings by employees and stakeholders are largely aligned.
- i) When examining the changes in ratings between the 2019 and 2024 surveys, the following changes in ratings of the external environment by employees are notable:
 - a. While there are nine instances where rankings change, eight of these are small changes to their ranking that don't materially change their categorisation as a threat or opportunity.
 - b. The one item that moves to being rated as a more distinct threat is the stability/sufficiency of trade agreements.
- j) When examining the changes between the 2019 and 2024 stakeholder surveys rating the external environment, the following key changes in ratings are notable:
 - a. Two elements were ranked much higher (i.e. as opportunities, relatively):
 - i. the willingness of the private sector to invest and;
 - ii. collaboration with other government departments (locally and nationally).
 - b. Two elements are ranked much lower (i.e. as threats, relatively):
 - i. the clarity on the services the Department should be providing and the role it should play in the sector and;
 - ii. the Department's access to the service providers it needs to deliver its services.

Review of Evaluations, BFAP Reports and Quarterly Risk Report

The second source of information for the SWOT included all the evaluations conducted by the Department since 2014. It is important to highlight that the evaluations cover a diverse range of subjects and go into great depth in specific aspects of the Department's internal and external environments. The review of the evaluations for the purposes of the SWOT has avoided repeating these specific findings and rather sought to distil these to insights and findings that are relevant to the SWOT.

The first step in the evaluations review process was to "map" the completed evaluation to the Department's Programmes and sub-programmes. This enabled the "scope" and "reach" of the

evaluations to be contextualised and provided the basis for the detailed review and categorisation of findings that followed. Table 35 and Table 36 set out the Department's current programme and sub-programme structure and maps the Evaluations completed over the last 5 years and in the 2019 SWOT analysis respectively, to this structure.

Each evaluation was reviewed and findings deemed relevant to the SWOT extracted. These findings were then categorised as relevant to the internal, micro or macro environments and to which specific aspect of these environments they related. The same overall structure of aspects/subjects was used to categorise these findings as that used for the surveys and the qualitative output derived from the focus groups & free-text responses.

Note that this data source, just like the others, have unique strengths and weaknesses. The strengths of the evaluation reports include the rich and detailed datasets that many of them draw on; the depth of expert analysis applied to this; and that a degree of expert judgement was already applied in choosing what to report as salient. A notable limitation is that the Department chooses the topics for evaluations based on a range of considerations, including the need to fill information gaps; the readiness / evaluability of the programme; and/or the strategic importance of the topic. Therefore, their thematic coverage is not distributed evenly across all departmental programmes (see discussion of this below). They also do not evenly cover all factors that may be important to identify Departmental strengths, weaknesses, opportunities and threats. It should also be noted that all evaluations were undertaken in the previous terms of national and provincial government, and the political changes in the wake of the 2024 elections are therefore not reflected. Just like the other primary data sources, the evaluations offer a set of data points which were weighed up on their merits alongside the others, to arrive at the synthesised findings in section 3.

Table 35: Programme Structure vs. Evaluations completed 2019 – 2024.

Programme	Sub Programme	Evaluation Report - 2019 to 2024													
		Africa Strategy	Agri-workers Services	Brandvlei	COVID Agri-Processing	COVID Response	Farmer Categories	Food Security	Fruitlook	Future Arid Areas	Graduate Employability	Keutbooms Area	Land Reform	Meat safety	SmartAgri
1. Administration	1.1 Office of the MEC														
	1.2 Senior Management														
	1.3 Corporate Services														
	1.4 Financial Management														
	1.5 Communication Services														
	1.6 Internship/Youth Skills Development Opportunities														
	1.7 Decision Support Services														
2. Sustainable Resource Use & Management	2.1 Engineering Services														
	2.2 Land Care														
	2.3 Land Use Management														
	2.4 Disaster Risk Management														
3. Agricultural Producer Support and Development	3.1 Producer Support Services														
	3.2 Extension and Advisory Services														
	3.3 Food Security														
	3.4 Casidra SOC														
4. Veterinary Services	4.1 Animal Health														
	4.2 Veterinary Public Health														
	4.3 Export Control														
	4.4 Veterinary Laboratory Services														
5. Research and Technology Development Services	5.1 Plant Science														
	5.2 Animal Science														
	5.3 Research Support Service														
	5.4 Technology Transfer Services														
	5.5 Research farms														
6. Agricultural Economics Services	6.1 Agri-Business Support and Development														
	6.2 Macro and Resource Management														
	6.3 Marketing and Agribusiness														
	6.4 Product economics														
	6.5 Agricultural economic Statistics														
7. Agricultural Education and Training	7.1 Higher Education and Training (HET)														
	7.2 Further Education and Training (FET)														
8. Rural Development	8.1 Rural Development Coordination														
	8.2 Social Facilitation														
	8.3 Farm Worker Development														
	8.4 Rural safety														
All	All														

17 evaluations for the period 2019 to 2024 were reviewed. This review yielded 393 findings. These were added to the 23 evaluations reviewed as part of the SWOT undertaken in 2019, which yielded 407 findings. These findings were synthesised into 13 key SWOT observations.

Table 36: Programme Structure vs. Evaluations completed 2014 – 2019.

		Evaluation Report - 2014 to 2019																					
Programme	Sub Programme	4th IR	End of Term Review	Agribusiness Investment Unit	Agric Economic Services	Commodity Approach	Dyseldorp	Economic Databases	Farm Worker of the Year	Farmer Categories	Food Security	Higher Education & Training	Khulisa	Land Reform	Land Care	Leamships	Legislative Environment	Market Access	Rotation Trials	Rural Development	Total Mixed Rations	WIETA	Youth Development
1. Administration	1.1 Office of the MEC																						
	1.2 Senior Management																						
	1.3 Corporate Services																						
	1.4 Financial Management																						
	1.5 Communication Services																						
	1.6 Internship/Youth Skills Development Opportunities																						
	1.7 Decision Support Services																						
2. Sustainable Resource Use & Management	2.1 Engineering Services																						
	2.2 Land Care																						
	2.3 Land Use Management																						
	2.4 Disaster Risk Management																						
3. Agricultural Producer Support and Development	3.1 Producer Support Services																						
	3.2 Extension and Advisory Services																						
	3.3 Food Security																						
	3.4 Casidra SOC																						
4. Veterinary Services	4.1 Animal Health																						
	4.2 Veterinary Public Health																						
	4.3 Export Control																						
	4.4 Veterinary Laboratory Services																						
5. Research and Technology Development Services	5.1 Plant Science																						
	5.2 Animal Science																						
	5.3 Research Support Service																						
	5.4 Technology Transfer Services																						
	5.5 Research farms																						
6. Agricultural Economics Services	6.1 Agri-Business Support and Development																						
	6.2 Macro and Resource Management																						
	6.3 Marketing and Agribusiness																						
	6.4 Product economics																						
	6.5 Agricultural economic Statistics																						
7. Agricultural Education and Training	7.1 Higher Education and Training (HET)																						
	7.2 Further Education and Training (FET)																						
8. Rural Development	8.1 Rural Development Coordination																						
	8.2 Social Facilitation																						
	8.3 Farm Worker Development																						
	8.4 Rural safety																						
All	All																						

Table 37 presents the number of findings derived from the review of the evaluations that are relevant to the SWOT for the evaluations completed from 2019 to 2024. The table shows the findings for each aspect within each environment (internal, micro and macro), with a negative number (with red scaled bar) reflecting the number of findings classified as indicating a weakness or threat, and a positive number (with green scaled bar) reflecting the number of findings classified as indicating a strength or opportunity. Presenting the results in this way highlights where the focus of evaluations tend to be (the “programme/product design” and “programme effectiveness/impact” aspects of the internal environment, for example, account for almost half of the 391 findings made) and is also helpful in highlighting where particular strengths, weaknesses, opportunities or threats could be.

Table 37: Summary of 2019 – 2024 Evaluation findings showing their relevance to the SWOT.

Internal	Weaknesses	Strengths	Threats	Opportunities
Strategy & Policy	-1	0		
Organisational alignment & Effectiveness	-3	2		
Performance Culture	-2	4		
Human Resources	-9	2		
Design of Programme/Product/Service	-44	7		
Effectiveness & Impact of Programmes/Products/Services	-25	14		
Managing Collaborations & Networks	-2	1		
Marketing & Communication	-1	0		
Data & Information Management	-4	1		
Financial Management & Resources	-1	2		
Micro				
Government Funding			-7	3
Government (National & Provincial) Alignment/Coordination			-22	2
NGO's, Private Sector and other Role Players			-6	7
Market/Client Needs & Perceptions			-24	41
Broader market acceptance/reputation			-10	13
Macro				
Political: National Government Policy/Targets			-4	2
Political: Political Stability / Governance			-2	0
Political: Service Delivery & Infrastructure			-5	2
Economic: Economic Growth/Trade			-14	30
Economic: Private Sector investment			-2	1
Economic: Legal/Regulatory/Compliance environment			-8	1
Economic: Employment levels/opportunities			-2	2
Economic: Poverty levels			-2	0
Economic: Energy security			-1	0
Social: Consumer Trends			-8	1
Social: Education / Skills levels			-1	2
Social: Population demographics			-2	0
Social: Community health (social fabric)			-4	1
Social: Population interests/aspirations			-1	0
Social: Access to services			-2	2
Social: Food security			-1	0
Social: Population Health			-2	0
Technology: Emerging Technologies			-1	10
Environmental: Climate Change			-12	2
Environmental: Resource availability			-8	4

Observations from the review of evaluations of relevance for the SWOT

A number of observations relevant to the SWOT Analysis are made here regarding the Evaluations in general and in terms of the specific content of the evaluations.

- The Evaluations have been deployed by the Department as a robust mechanism to understand the effectiveness and impacts of its products and services offered through its programmes and sub-programmes as well as to evaluate specific subject areas relevant to its strategy and functioning. Since 2014 to date the Department has commissioned 39 evaluations (22 from 2014 to 2019, 17 from 2019 to 2024). This in itself can be regarded as a strength of the Department.
- Evaluations are not utilised across all sub-programmes. Considering all evaluations completed since 2014 evaluations have not been completed for the following sub-programmes 1.1 Office of the MEC, 1.2 Senior Management, 1.3 Corporate Services, 1.4 Financial Management, 1.7 Decision Support Services, 3.4 Casidra SOC, 4.1 Animal Health, 4.4 Veterinary Laboratory Services, 5.3 Research Support Service and 8.4 Rural safety.
- This may indicate a weakness related to sub-programme design (perhaps with structures not lending themselves easily to external evaluation) and/or could point to organisational issues

where leadership of different Programmes may have differing levels of commitment to or acceptance of evaluations as a management tool.

- d) The evaluations generally focus on evaluating the design and/or impact of the services & products offered by the Department and, understandably, these aspects account for the bulk of the findings indicating either a weaknesses or strengths of the Department. For the 2019-2024 evaluations:
 - a. There are 44 observations noted that indicate deficiencies in the design of the Department's services/programmes (weaknesses).
 - b. There are a further 25 observations that question the effectiveness and impact of the Department's services/programmes (weaknesses).
- e) These evaluations also highlight areas of threat and opportunity in aspects of the micro and macro environment. The following threats are highlighted:
 - a. Sufficiency of government funding
 - b. The alignment and effective working with other national and provincial government departments
 - c. Negative market perceptions towards a service offered by the Department (specifically FruitLook)
 - d. Barriers to trade and economic growth
 - e. Climate change impacts and resource availability
- f) Areas of opportunity highlighted were:
 - a. The needs and perceptions of the Department's clients (specifically in relation to the role the Department does/can play in addressing their needs and/or assisting in unlocking opportunities)
 - b. The broader standing/reputation of the Department amongst its clients/stakeholders represents an opportunity.
 - c. Opportunities related to expanded trade and economic growth.

BFAP Quarterly Risk Report and observations of relevance for the SWOT

The evaluations review was further supplemented by a review of the BFAP environmental scanning reports. The Department has commissioned The Bureau for Food and Agriculture Policy (BFAP) to undertake a quarterly environmental scan. The analyses aim to assess on a quarterly basis external risks or factors that could negatively impact the Western Cape agricultural economy. They are an important resource to identify anticipated threats (and opportunities) and thus relevant to the SWOT analysis. Similarly, the Department also maintains a comprehensive risk register that seeks to identify key internal and external risks and to formulate the responses to stop their emergence and/or mitigate their impacts . The risks identified through both the BFAP reports and Risk Register provide an additional source of material for the SWOT.

10 quarterly BFAP risk scanning reports were reviewed, as was the latest version of the Department's Risk Register. The BFAP reports and the Risk Register yielded 94 and 155 findings respectively. These findings were synthesised into 22 key SWOT observations.

- a) The fact that the Department runs comprehensive risk management and environmental scanning processes is, in and of itself, a significant strength.
- b) The risk register highlights aspects of the Department's internal functioning which may point to inherent weaknesses:
 - a. Insufficient security of key research resources, assets and data.
 - b. Insufficient data provided for decision makers.

- c. Weaknesses of ICT infrastructure and systems that may render them inaccessible/inoperable.
 - d. Unauthorised access to the Department's ICT systems – hacking & identity theft.
 - e. An organisational culture that may unwittingly open itself to incidents theft, corruption, nepotism and other fraudulent/unethical activities by employees.
 - f. Challenges in up-skilling and addressing the skills gaps needed by the Department.
 - g. Challenges in enabling/driving required pace of transformation of the student body at Elsenburg.
- c) The risk register highlights aspects of the Department's external environment which point to threats it (and the sector) is likely to face or is already facing:
- a. Uncoordinated activities between government departments. disrupt/undermine delivery of services in Rural Areas.
 - b. Biosecurity risks: Inadequate control and outbreak of animal diseases, impacting food security, human health and trade.
 - c. Challenges with safety and security in rural areas.
 - d. Protest action by agri-workers.
 - e. Climate change impacts on the sector and the ability of the Department to function successfully.
 - f. Further degradation of the biological fertility of soil and losing productive land for agricultural use
- d) The BFAP Environmental Scans highlight a number of key aspects of the Department's external environment which point to threats it (and the sector) is likely to face or is already facing:
- a. Uncoordinated and "broken" systems of control, communication etc. pose a major Biosecurity threat.
 - b. Climate change and extreme weather events.
 - c. Global and local economic trends of inflation, rising food prices, exchange rate volatility, rising input costs, slow growth etc. pose a threat to the economic prospects of the sector.
 - d. High unemployment levels and the dependence on grants in poor communities
 - e. A combination of factors such as climate change, extreme weather food inflation, potential competition from biofuels for feedstock etc. may threaten food security.
 - f. The Western Cape is threatened by Geo-political changes such as the Ukraine and Israel wars that have impacted input costs and may threaten market access given South Africa's policy stances regarding these.
 - g. Social unrest due to governance failures, unemployment etc. This raises risk to rural safety.
 - h. Failures of critical energy, road and port infrastructure pose a major threat to the economy in general and agriculture in the Western Cape in particular.

Observations from the free-text responses and the focus group discussions.

As discussed above, the online surveys offered the opportunity for respondents to share additional comments on the internal and external environment that they considered could be of value to the SWOT analysis. Furthermore, six focus group discussions were facilitated to allow employees and stakeholders to provide deeper insights that could further enrich the SWOT analysis. The output from these qualitative sources are summarised in Table 38 and Table 39.

The employee and stakeholder surveys yielded 285 and 134 free-text responses respectively. Four internal focus group discussions were held with a total of 45 participants. Three (3) stakeholder focus group discussions were held with a total of 20 participants. The output from these qualitative sources were distilled into 28 key SWOT subject areas.

The distillation of the qualitative output resulted in 28 subject clusters across the Departments internal, micro and macro environments. Given the qualitative output, the essence of comments made (and free-text comments submitted) were summarised in bullet points under each subject

cluster. These summaries are presented in Table 38 and Table 39 for the internal and external (micro and macro) environments respectively.

Table 38: Summary of Strengths and weaknesses from free text and focus group responses.

Weaknesses	Strengths
<p><i>Design of Programmes/Products / Services</i></p> <ul style="list-style-type: none"> • Slow decision making / too bureaucratic. • Focus on emerging developments/smallholder agriculture resulting in insufficient focus on commercial agriculture. • Insufficient focus on developing/securing market access / trade facilitation. <p><i>Administration, Controls & Record Keeping:</i></p> <ul style="list-style-type: none"> • Burdensome internal controls / red tape / too much paperwork. <p><i>Financial Management & Resources</i></p> <ul style="list-style-type: none"> • Budgetary constraints – can't fill key posts, purchase needed equipment etc. • Insufficient budget for infrastructure maintenance. • Providing services but with limited resources. <p><i>Human Resources</i></p> <ul style="list-style-type: none"> • Losing key skills/experience in key roles/functions • Insufficient succession planning / ageing senior management. • Insufficient capacity in some key areas/functions. • Top heavy management / proportionally not enough operational staff. <p><i>Organisational Culture</i></p> <ul style="list-style-type: none"> • Autocratic/ top-down / micro management. • Archaic organisational structure / work in silos • Culture of caring is lacking. • Inconsistency of performance culture across organisation. • Appears to some employees as more focussed on stakeholders and less on its employees. • Inconsistent quality of managers, from excellent and inspiring, to uncaring and even toxic. <p><i>Occupational health and safety</i></p> <ul style="list-style-type: none"> • OH&S a concern for lower-ranking workers – specifically related to fire, injury on duty, personal protective equipment, and appropriate training for risky tasks. 	<p><i>Data & Information Management:</i></p> <ul style="list-style-type: none"> • Good intranet / internal communications / transparency. <p><i>Human Resources</i></p> <ul style="list-style-type: none"> • Good mix of skills / qualifications / competent staff / subject matter experts. • Low staff turnover / stability of staff compliment. • Diversity celebrated / a diverse team. • Hands on approach of senior management. • Strong team and leadership from HOD. <p><i>Managing Collaborations & Networks</i></p> <ul style="list-style-type: none"> • Good convenors and collaborators. • Good listeners / accessible / innovative. • Strong and valued networks/relationships with industry. • The Department has established networks and partnerships necessary to deliver needed scale and reach. • The Department acts and reacts quickly to requests and crises. <p><i>Organisational Culture</i></p> <ul style="list-style-type: none"> • Committed/dedicated / professional employees. • Resilience / go the extra mile. • Employees take pride in their work • An empowering environment that encourages growth. • No compromise on compliance and good administration. <p><i>Delivery of Services/Programmes/Impact</i></p> <ul style="list-style-type: none"> • Cape Farm Mapper is an excellent tool. • Very good research capacity. • Accessibility of the Department's support divisions/services. • Footprint and impact that extends to remote areas and small towns across the province.

Table 39: Summary of Opportunities and Threats from free text and focus group responses.

Threats	Opportunities
<p><i>Funding</i></p> <ul style="list-style-type: none"> • Ongoing budget cuts to the Department. • Risk of "burnout" of a Department that is underfunded, at huge cost to the sector in the Province. <p><i>Government (National & Provincial)</i></p> <p><i>Alignment/Coordination</i></p> <ul style="list-style-type: none"> • Lack of transversal collaboration and alignment between different government departments. • Tension between National and Provincial spheres of government. • Still too much red tape / over regulation. • Too much pressure placed on the Department because of failures of other government functions (overburdened / not sustainable). • Department ends up working in isolation to get the job done. <p><i>Political Stability / Governance</i></p> <ul style="list-style-type: none"> • Political uncertainty/instability in South Africa. <p><i>Economic Growth/Trade</i></p> <ul style="list-style-type: none"> • Rising inflation / high input costs. • High/increasing unemployment rates. • Threats to agricultural land on the edges of urban areas (pressure for housing development). • Unfavourable trade agreements impacting exports / Future of AGOA and/or future US trade arrangements uncertainty. • Challenges with the green transition - export markets want to trade with countries with "green standard". Could limit market access. <p><i>Demographics/Population growth</i></p> <ul style="list-style-type: none"> • Migration of unskilled people into the Western Cape putting pressure on resources in urban areas. • Migration of people from other African countries into Western Cape putting pressure on resources in urban areas. <p><i>Technology</i></p> <ul style="list-style-type: none"> • Cyber security and data privacy risks as dependence on data systems grows. • More technology and automation pose a threat to employment at farm-level. <p><i>Infrastructure</i></p> <ul style="list-style-type: none"> • High costs and poor performance of key infrastructure such as ports, rail, road and 	<p><i>Managing Collaborations & Networks</i></p> <ul style="list-style-type: none"> • Agri stakeholders are positive and open to working with the provincial government. • Leverage the relationship with the Wine Industry who is offering access to their Learning Management System (LMS) to help in the upskilling of Departmental staff. • The Water Users Platform presents an opportunity to deepen collaborative water resource management in the Province. • Collaborations with certification schemes to integrate/mainstream legislation like CARA into these standards. • Strengthening collaboration/alignment with WESGRO. <p><i>Private Sector investment</i></p> <ul style="list-style-type: none"> • Co-funding opportunities with international parties and private sector (including research organisations). • Potential for Public Private Partnerships. • The private sector, particularly in agriculture, can and will make significant contributions to solve the current and future energy/water shortages. • Availability of global and domestic investments in agricultural technology and infrastructure. <p><i>Government (National & Provincial)</i></p> <p><i>Alignment/Coordination</i></p> <ul style="list-style-type: none"> • Collaborations with other provinces to unlock synergies / align efforts. • Openness for more regular engagement sessions with local government on implementation of programmes within municipal areas – including management of commonages. • Joint District Metro Approach (JDMA) can be better utilised as platform to co-plan, co-budget and co-implement projects. <p><i>Political Stability / Governance</i></p> <ul style="list-style-type: none"> • Good governance/political stability in the Western Cape. <p><i>Economic Growth/Trade</i></p> <ul style="list-style-type: none"> • Market and free-trade opportunities in Africa and into China. • Agri-tourism growth opportunities. • Western Cape agriculture's strong/growing export position. <p><i>Technology</i></p>

Threats	Opportunities
<p>borders.</p> <ul style="list-style-type: none"> • Port delays in shipping are a significant threat to agricultural exports. <p><i>Geo-politics</i></p> <ul style="list-style-type: none"> • Impacts of Russia/Ukraine war and Israel war. • Increasing protectionism / trade tensions / global instability. <p><i>Biosecurity & food safety</i></p> <ul style="list-style-type: none"> • Disease outbreaks. • Lack of /inadequate surveillance for invasive pests and diseases. • Insufficient control at borders to Western Cape to limit animal movement. • Lack of enforcement of food safety regulations. <p><i>Natural resources</i></p> <ul style="list-style-type: none"> • Loss of soil/biodiversity / habitat / declining pollinators etc. – compromise resilience. • Water scarcity/ increasing demands for water from growing urban populations. • The lack of maintenance of water infrastructure (dam systems and canals)- threat of increasing loss and wastage. • Insufficient arable land available for emerging farmers. <p><i>Climate change</i></p> <ul style="list-style-type: none"> • Climate change impacts / extreme weather disruptions. • Inability to adapt production systems to climate change can affect gains from agriculture. 	<ul style="list-style-type: none"> • Potential for AI and digitisation to address port current challenges and constraints. • Technology and automations improving the efficiency of agriculture.

Results from Senior Management Workshop

The preliminary SWOT synthesis was presented to the Senior Management in a workshop held on the 30th of July. The workshop provided the opportunity for the senior team to provide further input into the synthesised output. A number of important points were raised that were incorporated into the final synthesis. The following specific points were highlighted that resulted in amendments and additions to the final SWOT presented.

- a) Food security: A question was raised as to whether biofuels production could really represent a threat to food security (through competing for crops). It was agreed that while it is a somewhat theoretical risk at present it could emerge as a real risk in the future. It was also highlighted that it is just one of a number of factors that could contribute to threats to food security in the province (see Ma.T.10 in Table 45 below).
- b) Interests and aspirations of youth: The threat was highlighted that young people do not regard employment and careers within agriculture in a positive way, making it a challenge to attract the next generation of farmers and role players into the sector. This was added as a threat (see Ma.T.15 in Table 45 below).

- c) Population growth: While it was agreed that the general migration into the Province of unskilled people does pose a threat, it was highlighted that the whole subject is more nuanced and that the popularity of the province is also resulting in an inflow of skilled people who can positively impact the sector. Also, the inflow can mean a larger market and the province being able to attract a larger portion of budget from Treasury. This nuance was incorporated in the synthesis (see Ma.T.9 in Table 45 below).
- d) National government policy: While it was acknowledged that the synthesised threat related to Nation Government is valid (that South African government policy both locally and in international relations is a potential threat to stability of agriculture in the Western Cape and market access of agricultural exports from the Western Cape), it should be noted that the new political dispensation and Government of National Unity represents a significant opportunity. This was incorporated in the "consideration for strategy" (see Ma.T.1 Table 45 below).
- e) Local government: The threat was highlighted, related to the instability in local government that has a profound impact on service delivery, and results in loss of key infrastructure and services required by the sector. This threat in the micro environment was added (see Mi.T.4 in Table 43 below).
- f) Technologies employed: While it was agreed that the Department's IT systems constitutes an internal strength it was highlighted that there are significant risks related to data breaches and system hacking. This insight was incorporated and highlighted in the synthesis of the strength and "consideration for strategy" (see In.S.4 in Table 40 below).
- g) Organisational structure/culture: While the synthesised finding related to organisational culture (internal Weakness) was accepted it was highlighted that many of the "operational and reporting rules" that cause frustration for employees are requirements imposed on the Department and that what is required is a communication process to highlight this with employees. This was incorporated in the "consideration for strategy" (see In.W.4 in Table 41)
- h) Biosecurity: It was highlighted that biosecurity risks are not limited to livestock only but apply to crops as well. This point was incorporated in the finding (see Ma.T.12 in Table 45).
- i) Climate change: It was noted that, while climate change represents a significant threat, it also presents opportunities (for example, in opening up new market access opportunities and markets for new technologies such as shade netting. This insight was added to the finding. (see Ma.T.13 in Table 45 below).
- j) Human resources: It was highlighted that the Human Resource function is centralised at provincial level and this imposes some limitations on what the Department can and can't do to address Human Resource related challenges. This was incorporated in the "consideration for strategy" (see In.W.2 in Table 41)

The observation from the primary sources to the SWOT analysis (as presented above) were further synthesised into a final set of strategic strengths, weaknesses, opportunities and threats. All information sources were considered in determining how best to synthesise and characterise each of the strategic observations. To aid this process a statement summarising each synthesised observation, and a summary of what the strategic implication of each could be were developed – the aim being to get to the essence of the final synthesis while reflecting, as far as possible, the range of views and nuances within each finding. These are provided for consideration as the Departments strategic planning proceeds.

The synthesis is presented in two parts. In the first part tables are provided that show the final synthesised output and how they are characterised as Strengths or Weaknesses of the Department's internal environment, or Opportunities or Threats of the Department's Micro and Macro

environments respectively. Each finding is given a reference (for example Mi.O.2 is the reference for the second Opportunity highlighted for the Micro environment).

In the second part the synthesised SWOT output is mapped to the Department's Macro-level theory of Change, highlighting the areas of the Macro ToC impacted by the synthesised SWOT.

The final synthesis resulted in the identification of 7 internal strengths, 4 internal weaknesses, 2 micro environment opportunities, 4 micro environment threats, 3 macro environment opportunities and 15 macro environment threats deemed to be of strategic relevance to the Department's strategic planning process.

The synthesis is presented in Table 40 through Table 45 where the synthesised findings for the Internal Environment Strengths, & Weaknesses, Micro environment Opportunities and Threats and Macro Environment Opportunities and Threats are presented respectively.

Table 40: Synthesis of Internal Environment Strengths.

Ref	Feature	Synthesis	Considerations for Strategy
In.S.1	Product/Service Portfolio/ Design of programmes, interventions etc.	Strength: Evaluations have been deployed by the Department as a robust mechanism to understand the effectiveness and impacts of its products and services offered. While the evaluations highlight specific issues in the design and delivery of its services, this is to be expected as this, in most cases, is the main purpose of the evaluations. The commitment of the Department to robust monitoring and evaluation processes is a significant strength that drives continuous improvement in the Department.	There could be improvement in the formulating and design of interventions and services by reducing the internal "red tape" when formulating activities/services/interventions (to improve responsiveness and agility). An internal reflection may be warranted to assess if there is any merit in the issue raised in a focus group that the department's focus is too much on developmental farmers and insufficiently on commercial agriculture.
In.S.2	Collaboration / Networks	Strength: The Department has an established reputation for excellence in convening different roll-players, and facilitating productive engagement and exchange between role-players. This was very evident, but not exclusively, in the COVID crisis.	This is a critical strength that can/should be leveraged to support the effectiveness and impact of the Department's activities in the sector.
In.S.3	Delivery of Services/ Programmes/ Impact	Strength. Excellence in the delivery and execution of its services. The Department is acknowledged for its array of products, services and tools.	This is a critical strength that can/should be leveraged to support the effectiveness and impact of the Department's activities in the sector.
In.S.4	Technologies employed	Strength: The Department has good IT systems that support good communication and transparency internally. Notwithstanding this strength there are significant risks associated with ICT systems being exposed to data breaches. This is highlighted in the risk register.	While this is a strength that can/should be leveraged to support effective internal operations and the impact of the Department's activities in the sector the risk to data security, breakdowns of ICT systems and hacking/data breaches need to be noted and steps taken to mitigate this risk (or to evaluate the

Ref	Feature	Synthesis	Considerations for Strategy
			sufficiency of the mitigation steps already in place).
In.S.5	Information & data / communication	Strength: The Department is good at compiling and sharing needed information internally and sharing with external stakeholders.	While this is a strength that can/should be leveraged to support effective internal operations (and communication with stakeholders) and the impact of the Department's activities in the sector the risk of insufficient data/information for decision-makers (internal and external) should be noted and steps taken to mitigate this risk (or to evaluate the sufficiency of the mitigation steps already in place).
In.S.6	Administrative processes/controls/record keeping	Strength: The Department administers and manages its projects very well and runs comprehensive risk management and environmental scanning processes. It also has very strong financial controls in place.	While this is a strength that can/should be leveraged to support effective internal operations and the impact of the Department's activities in the sector it should assess the administrative burden this may place on employees and stakeholders resulting in "red tape" and too much paperwork. Steps to ensure that the right balance is struck should be taken (or to evaluate the steps already in place).
In.S.7	Strategic/Policy clarity	Strength: The Department has a clear and effective strategy.	This is a critical strength that can/should be leveraged to support the effectiveness and impact of the Department's activities in the sector.

Table 41: Synthesis of Internal Environment Weaknesses.

Ref	Feature	Synthesis	Considerations for Strategy
In.W.1	Marketing of services/programmes	Weakness: Stakeholders (who are the target of the Department's marketing efforts) rate the effectiveness of the Department's marketing efforts much lower than the Department does. This points to a disconnect between the internal marketing efforts and its real impact.	Marketing is key to the Department's overall effectiveness. Effective marketing should result in greater uptake of the Department's services and thus increase the Department's impact. Specific mechanisms to track and measure the impact of the Department's marketing activities should be considered.
In.W.2	Human Resources	Weakness: A number of factors point to aspects of the Department's Human Resources being a weakness. This includes the loss of key staff, insufficient succession planning, lack of capacity in some key functions and insufficient numbers of	While this is rated overall as an area of weakness, there are a number of factors that point to aspects of the Department's Human Resources being a strength. These include low staff turnover, the skill/competency of certain employees, the diversity of

Ref	Feature	Synthesis	Considerations for Strategy
		operational staff in relation to management roles. Challenges with upskilling staff are also highlighted as a risk. Issues of insufficient occupational health & safety were also raised, particularly for operational staff.	the team, the hands-on approach of senior management and the leadership of the HOD. The Department is a large organisation that operates across many operational sites. Therefore, it is understandable that there is this range of sentiment expressed in the ratings and information gathered. However, like any organisation, the Department is as good as the people it employs. Activities that address key Human Resource challenges/ shortcomings should be prioritised (for example addressing capacity and skills gaps, developing and communicating clear succession plans, upgrading occupational health & safety programmes at operational sites etc.). The areas of Human Resource strength are key to achieving this and should be further leveraged. It is noted that the Human Resource function is centralised at Provincial level and this imposes some limitations on what the Department can and can't do to address Human Resource related challenges. Consideration can also be given to bringing more of the HR functions "in-house".
In.W.3	Financial resources/ budgets	Weakness: The Department operates under budgetary constraints that restrict its operational effectiveness and impact.	Overcoming these financial/budgetary constraints should be a strategic priority for the Department. The newly constituted Government of National Unity may provide opportunities in this regard. Opportunities to secure funding through public/private partnerships and other innovative funding mechanisms should be explored.
In.W.4	Organisational structure - Alignment / Clarity. Effectiveness Organisation al Culture - performance oriented	Weakness: This aspect of the Department's internal environment is the most difficult to rate as there is a wide range of perspectives indicating both strength and weakness. However, the fact that there is this inconsistency has resulted in this aspect being flagged overall as a weakness. This aspect scored a low rating by employees and the qualitative	It is important to note that there are clear areas of excellence related to the organisation's structure and culture. This is notable in the stakeholder survey where the organisational culture is rated highest of all internal aspect. This points to an appreciation by stakeholders of the work undertaken by the Department and the way this work is done. This

Ref	Feature	Synthesis	Considerations for Strategy
		information gathered indicates that the organisational structure and culture appears to many employees as too hierarchical, top-down and "micro-management" focussed. The risk register also highlights risks of unethical and fraudulent activities by employees. The fact that these risks are raised points to there being elements within the organisation willing to adopt these organisationally destructive behaviours.	comes through in the qualitative information too, where the Department is noted for going the extra mile, being dedicated and resilient and not compromising on compliance and good governance. The strategic implication could be to prioritise active steps (or evaluate current steps being taken) to ensure the broadening and deepening of the Department's values and culture of excellence across all programmes and employee levels. It is also critical that there is greater understanding amongst employees that the "rules" and paperwork are requirements imposed on the department – this may require a concerted communications campaign.

Table 42: Synthesis of Micro Environment Opportunities.

Ref	Feature	Synthesis	Considerations for Strategy
Mi.O.1	Other Private and/or NGO and/or Stakeholders players/ Programmes	Opportunity: The Department has a very good relationship with, and is well regarded and trusted by, industry stakeholders - this opens the way for greater collaboration and unlocking synergies. There is an openness from these stakeholders to work with the Department. Specific opportunities highlighted include working with the Wine Industry and their LMS system for the upskilling of staff, the Water Users Platform to deepen collaborative water resource management in the Province and collaborations with certification schemes to integrate/mainstream legislation like CARA into these standards and strengthening collaboration/alignment with WESGRO.	The Department has a key role to play as a convenor/facilitator and there appear to be many opportunities to unlock this opportunity around specific initiatives that can benefit the Department and the sector at large. Consideration can be given to developing specific strategies and interventions that leverage the Department's reputation and convening strengths to unlock these opportunities.
Mi.O.2	Broader Market standing/ reputation/ acceptance	Opportunity: The Department has a very good reputation with stakeholders in the sector. This is confirmed in the survey and evaluations review.	The Departments good reputation as a trusted agent in the sector is of immense value. This allows it to play its role with confidence and authority in the sector.

Table 43: Synthesis of Micro Environment Threats.

Ref	Feature	Synthesis	Considerations for Strategy
Mi.T.1	Service Providers/ Suppliers	Threat: The insufficient availability/quality of service providers and suppliers to the Department - and that this can undermine service delivery, - was highlighted as a threat in both employee and shareholder surveys.	Third-party suppliers and service providers have a key role to play as resources the Department can deploy to strengthen its effectiveness and impact. Any threat to the availability of suitably qualified suppliers and service providers is therefore threat to the Department's performance. Consideration should be given to strategies that will proactively identify, vet and potentially capacitate suppliers and service providers.
Mi.T.2	National and/or Provincial Government - operational alignment	Threat: Challenges aligning with and working effectively with other national and provincial government departments. There is frustration with the working in silos and in a disjointed way between government departments and across legislation. This results in duplication, too much red tape, and ultimately, too much pressure on the Department to cover role/functions that should be provided by other departments.	While this is an overall threat, there are also positive examples of where effective alignments and coordination of effort bears fruit and specific opportunities for collaboration have been highlighted. The Department has a key role as a transversal coordinator and aligner that enables a more unified, simplified and aligned engagement with stakeholders across the sector. Strategy could consider ways to enhance this role.
Mi.T.3	National and/or Provincial Government - funding	Threat: The Department faces ongoing budget cuts. There is a real risk of "burnout" as the Department seeks to deliver on its mandate but having to "fight with one hand tied behind its back". This threat is highlighted in the surveys of employees and stakeholders and is highlighted in the qualitative responses.	Overcoming these financial/ budgetary constraints should be a strategic priority for the Department. The newly constituted Government of National Unity may provide opportunities in this regard. Opportunities to secure funding through public/private partnerships and other innovative funding mechanisms should be explored.
Mi.T.4	Local government	Threat: Instability in local government has a profound impact on service delivery, and results in loss of key infrastructure and services required by the sector.	Explore ways to strengthen engagement with local government with a focus on those service-delivery areas most critical to the Department and its ability to fulfil its mandate.

Table 44: Synthesis of Macro Environment Opportunities.

Ref		Feature	Synthesis	Considerations for Strategy
Ma.O.1		Political stability/ Governance	Opportunity: Governance in the Western Cape is rated very highly as a driver of business confidence in both employee and stakeholder surveys. It is to be noted that this is in the context of threats being flagged about governance and service delivery at National Government level that result in a loss of social cohesion, frustration, increased unrest, lawlessness etc. that can and do impact provincial governance.	The Department's strategies should capitalise on the opportunities created by the good governance in the Western Cape, but remain aware of the broader national challenges that can and do spill over into the Province. The new Government of National Unity may provide greater opportunities to address these national challenges.
Ma.O.2		Private sector Investment	Opportunity: There is a general willingness of the private sector to invest in agriculture through co-funding arrangements, public private partnerships etc.	Engagement with private sector role players and organisations like WESGRO to unlock this investment potential.
Ma.O.3		Emerging technologies	Opportunity: Potential for new technologies including automations, AI and digitisation to improve efficiencies in agriculture and also solve challenges such as port congestion etc. Notwithstanding this clear opportunity, the possible negative consequence of technologies on employment levels at farm-level are also highlighted.	

Table 45: Synthesis of Macro Environment Threats.

Ref	Feature	Synthesis	Considerations for Strategy
Ma.T.1	National Government Policy/Targets	Threat: South African government policy both locally and in international relations is regarded as a potential threat to stability of agriculture in the Western Cape and market access of agricultural exports from the Western Cape. National Government Policy is rated as undermining business confidence in both employee and stakeholder surveys.	The Department may have to consider strengthening its role in policy advocacy as well as its engagement with policy makers, local and international stakeholders, trade organisations etc. The new Government of National Unity may provide greater opportunity for this strengthened role.

Ref	Feature	Synthesis	Considerations for Strategy
Ma.T.2	Service Delivery/ Infrastructure	Threat: Failures of critical energy, road and port infrastructure pose a major threat to the economy in general and agriculture in the Western Cape in particular.	The Department can consider involvement in the various forums and initiatives that have been formed between government and private sector to address the infrastructure related challenges, advocating for the Western cape agricultural sector.
Ma.T.3	Geo-political	Threat: The Western Cape is threatened by Geo-political changes such as the Ukraine and Israel wars, that have impacted input costs and may threaten market access given South Africa's policy stances regarding these. There is also a sense of greater global instability, increased protectionism and trade tensions.	This is a macro risk/threat/trend that the Department will have to continue to monitor through its risk scanning and sense-making processes.
Ma.T.4	Economic growth opportunities/ Trade	Threat: Global and local economic trends of inflation, rising food prices, exchange rate volatility, rising input costs, slow growth etc pose a threat to the economic prospects of the sector. Other factors highlighted that may undermine the economic outlook for agriculture in the province including risks to key trade agreements, loss of agricultural land due to urban expansion and the imposition of "green" standards that limit market access. Notwithstanding these concerns there is also recognition of important trade opportunities into China and the rest of Africa and the already established and strong export position of agriculture in the Western Cape.	Strengthening of the Department's processes to facilitate/support the sector in opening new export markets. Special attention could be given to China and Africa.
Ma.T.5	Poverty levels	Threat: High unemployment levels and the dependence on grants in poor communities	Strengthening of community food gardens, commonage areas and food security in rural areas.
Ma.T.6	Legal/Regulatory/Compliance	Threat: The Regulatory Environment is regarded by employees and stakeholders as being unhelpful/obstructive to business development & growth in the sector. This "red tape" places a drag on investment in the sector and serve as a significant barrier to new and aspirant entrants to the sector.	Support the enhancement and impact of the Provincial Government's red tape reduction unit.
Ma.T.7	Energy security	Threat: Energy insecurity manifesting through uncertain energy supply, rising costs, high investment barriers (to secure off-grid energy) and increased negative	This is a macro risk/threat/trend that the Department will have to continue to monitor through

Ref	Feature	Synthesis	Considerations for Strategy
		impacts/risks related to loadshedding.	its risk scanning and sense-making processes.
Ma.T.8	Labour markets	Threat: The risk of protest action by agri-workers.	This is a macro risk/threat/trend that the Department will have to continue to monitor through its risk scanning and sense-making processes.
Ma.T.9	Population growth	Threat: The migration of relatively unskilled people into the Western Cape (from within South Africa and the rest of Africa) increasing competition for resources such as land and water. It must also be noted that the migration into the province should not only be regarded as a threat as it is also resulting in an influx of skills in certain instances – this presents an opportunity.	This is a macro risk/threat/trend that the Department will have to continue to monitor through its risk scanning and sense-making processes. Opportunities to identify and to attract skilled individuals who have migrated into the province to the sector should also be considered. A growing population also has the potential to increase market size and consumption – thus this may present an opportunity. Population growth may also provide a basis for the province to attract a greater share of the national budget.
Ma.T.10	Food security	Threat: A combination of factors such as climate change, extreme weather food inflation, potential competition from biofuels for feedstocks currently grown for food etc. may threaten food security.	Supporting food security is a fundamental function of government in general and the departments of agriculture in each province specifically. A focus on strengthening the Department's programmes to support food gardens and food security may be warranted.
Ma.T.11	Rural Safety	Threat: Factors such as increasing poverty, social unrest, rising unemployment etc raises safety and security risks in rural areas.	Strengthening of the Departments programmes to improve safety and security in rural areas
Ma.T.12	Biosecurity	Threat: Biosecurity risk resulting from inadequate control and outbreak of animal diseases, impacting food security, human health and trade. This threat is not limited to livestock: increased prevalence of specific pests and diseases impacting crops is also an issue.	Strengthening of the Department's collaborations with other Provinces and its activities to control disease outbreaks. Enhanced engagement with the various industry bodies representing the crops produced in the province may be required to assist in

Ref	Feature	Synthesis	Considerations for Strategy
			preventing/addressing specific crop pests and diseases that are becoming more prevalent.
Ma.T.13	Climate change/ Weather predictability	Threat: An acceleration of change and unpredictability in climatic patterns, characterised by increasing summer and winter temperatures, reduced chilling units, greater unpredictability of rainfall timing and intensity, increasing drought episodes, higher wind speeds and storm energy etc. It is also to be noted that climate change also presents opportunities to agriculture in the province – for example, challenges in crop production in other parts of the world may open markets for South African producers. It is also opening up opportunities for new technologies such as shade netting.	Strengthening of the Department's activities directed at enhancing the sector's climate change resilience.
Ma.T.14	Natural Resources	Threat: Increased resource scarcity and constraints resulting from factors such as further degradation of the biological fertility of soil, losing productive land for agricultural use (for example, on the urban fringe), water resource scarcity, insufficient arable land, loss of biodiversity and pollinators etc.	Strengthening of the Department's activities directed at ensuring responsible resource use, sustainable agricultural production and the optimised use of land and water resources.
Ma.T.15	Interests/ aspirations	Threat: Youth do not regard employment and careers within agriculture in a positive way, making it a challenge to attract the next generation of farmers and role players to the sector.	This threat was highlighted in the Senior Management workshop and is regarded as a fundamental threat to the long term growth and competitiveness of the sector in the province. Strengthening the role of the Department in both skills development and promoting the sector as an attractive career and lifestyle option could be a strategic priority.

The findings are mapped to the Department's Macro Theory of Change (ToC). This is done both at the level of the elements that make up the ToC (organised into the columns headed Enablers, Internalise, Necessary Conditions, Outputs and Outcomes) and at the level of the strategic Outcomes and Sub-outcomes that the Department defined for its strategy in the previous planning cycle) the 14 columns on the right-hand side of the tables below. The output is presented in Table 46, Table 47 and Table 48 for the Internal, Micro and Macro Environments respectively. Please note, given lack of space the reference for each of the synthesised findings is provided for cross-referencing to the synthesis of findings tables above. Green blocks indicates where the finding indicates a Strength or Opportunity, and Red blocks where indicating a Weakness or Threat in relation to the relevant element(s) and strategic sub-outcome(s) of the Macros Theory of Change.

Table 46: Internal Environment SWOT mapped to the Department's Macro Theory of Change.

Ref	Enablers			Internalise			Necessary Conditions			Outputs		Outomes			1. Increased primary & secondary production in a sustainable manner					2. Improved food security & safety			3. Tranformed & inclusive agri sector			4. Innovative & resilient rural econ's				
	Safe and secure rural environment	A capable state / viable institutional environment	Ensure right technology, innovation & the on-boarding of 4th IR.	The transformation imperative	Employment of women, youth and people with special needs	Adaption to Climate Change and associated risks	Suitable Land	Suitable Water	Sufficient Skills	Sufficient Capital	Increased Primary Agricultural Production	Increased Secondary Agricultural Production	Growth in Export & Domestic markets	Increased Household food security	Increased Jobs	Economic growth	1.1 Maintain Export position	1.2 Enhance agri-processing	1.3 Sustainable production	1.4 Enhance sustainable water and land use	1.5 Enhance climate resilience	2.1 Increase community food production	2.2 Ensure food affordability	2.3 Enssure safe animal products	3.1 Imporve black farmer access & success	3.2 Increase relevant skills	3.3 Increased women and youth participation	4.1 Increase rural area economic opportunities	4.2 Create enabling environment for job creation	4.3 Improve rural area safety & security
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Table 47: Micro Environment SWOT mapped to the Department's Macro Theory of Change.

Ref	Enablers		Internalise		Necessary Conditions		Outputs		Outomes		1. Increased primary & secondary production in a sustainable manner		2. Improved food security & safety		3. Tranformed & inclusive agri sector		4. Innovative & resilient rural econ's		
	Safe and secure rural environment	A capable state / viable institutional environment	Ensure right technology, innovation & the on-boarding of 4th IR.	The transformation imperative	Employment of women, youth and people with special needs	Adaption to Climate Change and associated risks	Suitable Land	Suitable Water	Sufficient Skills	Sufficient Capital	Increased Primary Agricultural Production	Increased Secondary Agricultural Production	Growth in Export & Domestic markets	Increased Household food security	Increased Jobs	Economic growth			
Mi.O.1																			
Mi.T.1																			
Mi.O.2																			
Mi.T.2																			
Mi.T.3																			

Table 48: Macro Environment SWOT mapped to the Department's Macro Theory of Change.

Ref	Enablers			Internalise			Necessary Conditions				Outputs		Outomes				1. Increased primary & secondary production in a sustainable manner					2. Improved food security & safety			3. Tranformed & inclusive agri sector			4. Innovative & resilient rural econ's		
	Safe and secure rural environment	A capable state / viable institutional environment	Ensure right technology, innovation & the on-boarding of 4th IR.	The transformation imperative	Employment of women, youth and people with special needs	Adaption to Climate Change and associated risks	Suitable Land	Suitable Water	Sufficient Skills	Sufficient Capital	Increased Primary Agricultural Production	Increased Secondary Agricultural Production	Growth in Export & Domestic markets	Increased Household food security	Increased Jobs	Economic growth	1.1 Maintain Export position	1.2 Enhance agri-processing	1.3 Sustainable production	1.4 Enhance sustainable water and land use	1.5 Enhance climate resilience	2.1 Increase community food production	2.2 Ensure food affordability	2.3 Ensure safe animal products	3.1 Improve black farmer access & success	3.2 Increase relevant skills	3.3 Increased women and youth participation	4.1 Increase rural area economic opportunities	4.2 Create enabling environment for job creation	4.3 Improve rural area safety & security
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With this said, the Department has the benefit of a rich repository of research and data, and many internal and external stakeholders who have given constructive input. The report has subjected this to a transparent and systematic analytical process. The analysis has converged on some obviously salient matters and highlighted important nuances on others. As such it will serve as a valuable evidence source to prompt strategic discussion, motivate for prioritisation of certain issues in the coming term, the development of strategic plans and to orientate external parties or newcomers.

8.1.2. Demographic Profile

The population of the Western Cape (WC) increased by an additional 129 026 people between 2022 and 2023 bringing the total population to 7.5 million, which accounts for 12% of the national population. Figure 8 illustrates the absolute population of the province and its relative share of the national population for each year between 2013 and 2023. Over the past decade, the province's annual average growth rate of 1.9% has been higher than the national population average growth of 1.4%. This population increase adds additional pressure on service delivery, jobs, food, and other resources.

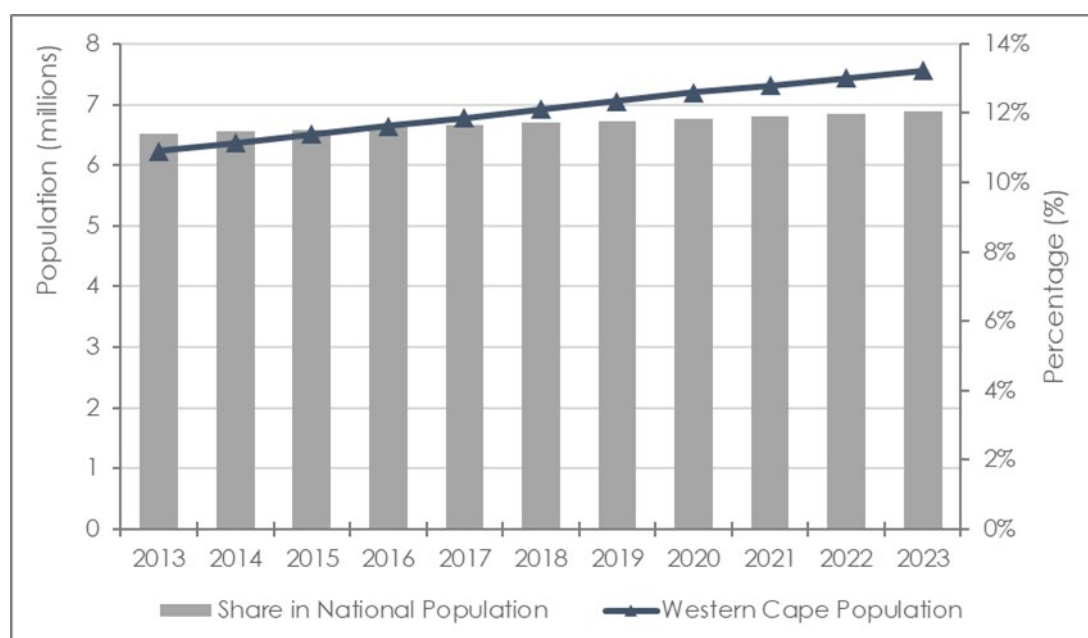


Figure 8: Western Cape absolute and relative population: 2013-2023.

Source: Quantec, 2024

Figure 6 below illustrates the distribution of the WC population by district for the period 2013 and 2023. The majority of the province's population resides in the City of Cape Town (64%), which also experienced the fastest population growth rate of 2% per annum over the past year. Overall, the relative breakdown of the population has not changed over the past decade.

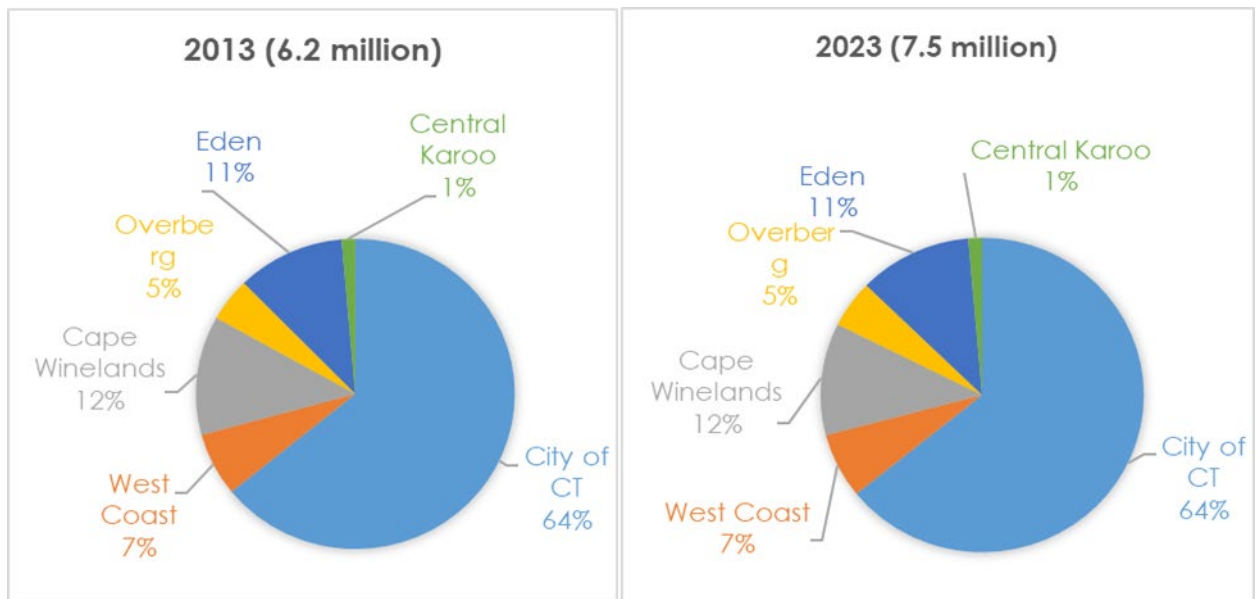


Figure 6: Western Cape population by District: 2013 vs 2023.

Source: Quantec, 2024

Figure 7 shows a breakdown of the WC population in 2023 by age and gender. The province has slightly more females, (52%) than males. In terms of age groups, a large portion of the population falls between the ages of 20 and 39, with these four cohorts together accounting for 35.9% of the total population.

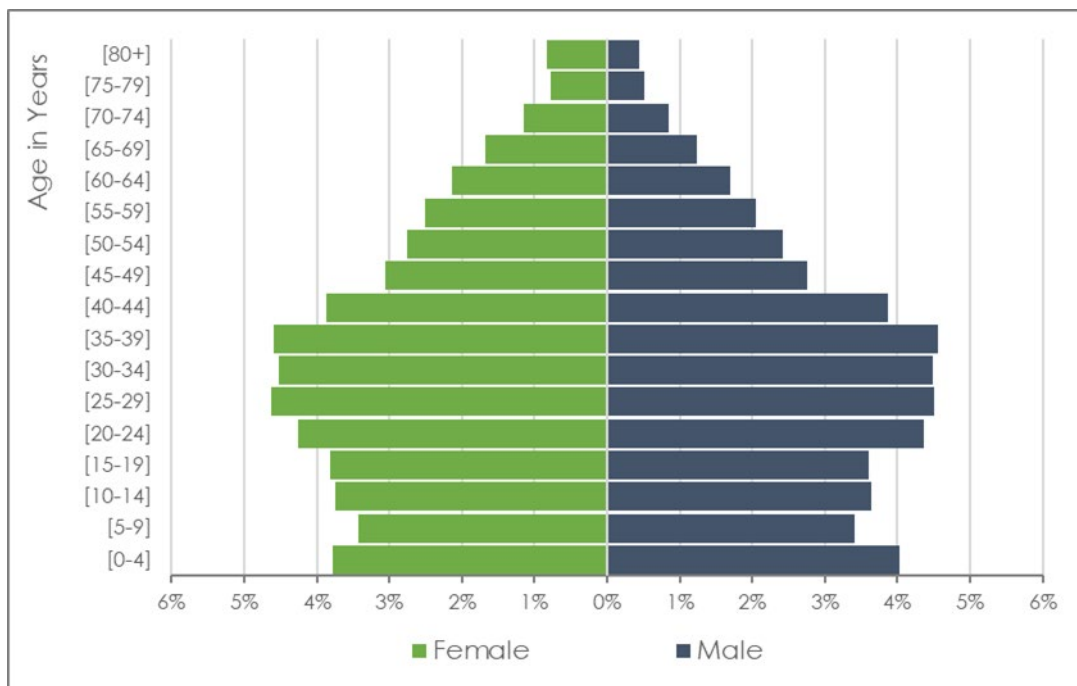


Figure 7: Western Cape population by age and gender 2023.

Source: Quantec, 2024

8.1.3. Agricultural Production

Agricultural production data must be interpreted in the context of high frequency data published for October and November 2024, that pointed to fast growth in trade sectors, whilst there is a high likelihood of some revisions to the quarter 3 GDP release. One of the biggest concerns was the

agricultural GDP numbers. After the release, the Bureau for Food and Agricultural Policy (BFAP) was subsequently requested to review the statistics that were released by the Department of Agriculture, Rural Development & Land Reform (DALRRD)'s sectoral statistics division. Figure 8 provides the summary of the findings and instead of the current -15.5% decline for the year-to-date, our analysis suggests that this should be closer to -5.6% and not -15.5%.

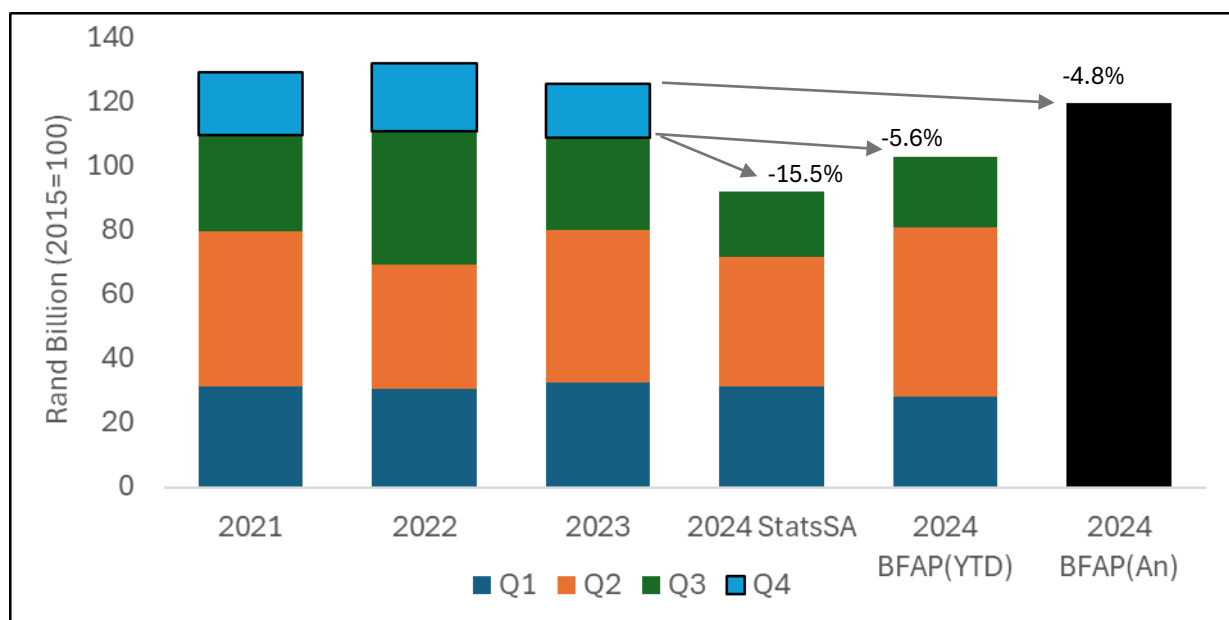


Figure 8: BFAP recalculated Agr-GDP numbers from the rapid assessment.

Source: BFAP (2025)

In a low-growing environment and a large contraction for agriculture, the impact on SA's economic growth numbers is large. Indeed, if one were to split out the Q3 Agri-GDP values, the SA economy would have grown by 0.4% and not by the reported -0.3%. At the time of writing, we have heard that there is a revision from StatsSA forthcoming for agriculture, but the size is not yet known.

Figure 9 illustrates the economic performance of the WC agricultural (incl. forestry & fisheries) sector has been positive over the 5 and 10 years, with an annual average growth rate of 2.5% and 2.7% respectively, reaching R25.6 billion in 2023. However, compared to the previous year, the gross value added (GVA) decreased by 4.4% in real terms from R26.8 billion in 2022 to R25.6 billion in 2023. The food sector increased by 3.1% (R393 million) in 2023 compared to the previous years. For the past 10 and 5-year periods, this sector grew at an annual average growth rate of 0.9% and 0.33% respectively. The beverage and tobacco industries' performance shows a decline of 15% compared to the previous year, and the annual average growth for the 10 and 5-year periods was negative 4.4% and 6% respectively. Overall, the combined performance of agriculture, food, beverage and tobacco industries declined in 2023 compared to 2022, showing a decrease of 5% (R1.1 billion). The period under review was affected by load-shedding, high agricultural input prices, constraints at the ports and extreme environmental disasters which have disrupted agricultural value chains. However, the provincial agricultural sector is resilient, having remained above pre-COVID-19 pandemic levels.

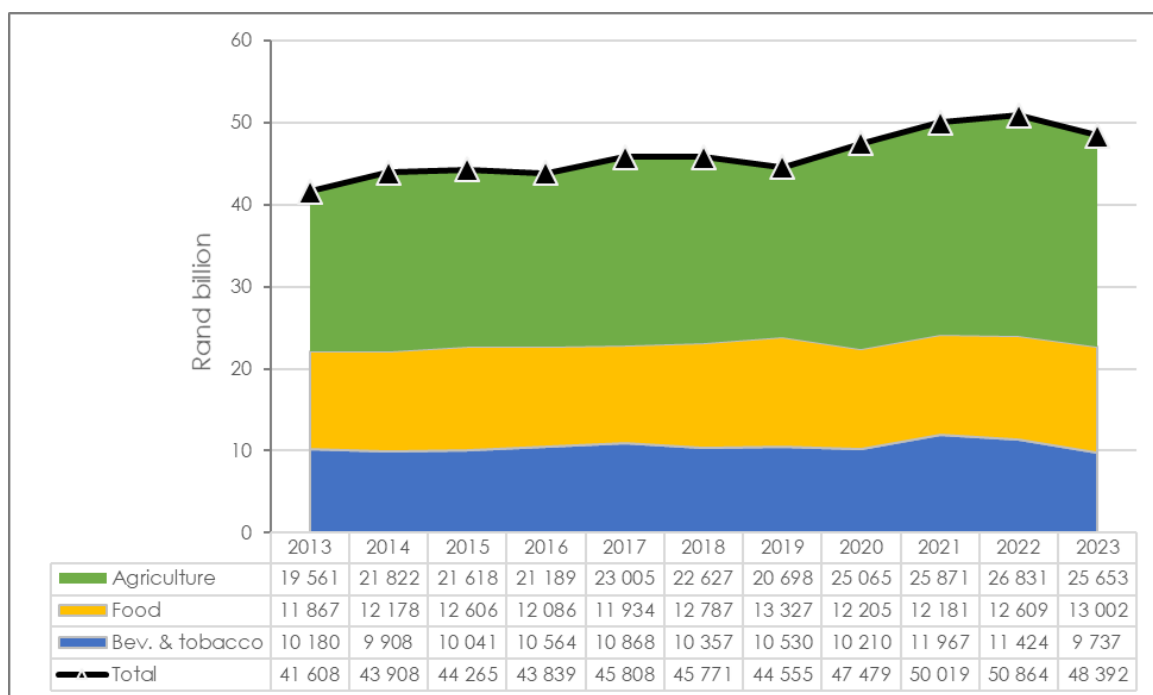


Figure 9: Western Cape agriculture and agri-processing gross value added (GVA): 2013-2023.
Source: Quantec, 2024

Figure 10 shows the percentage share contribution of the WC to national agriculture and agri-processing (food, beverage and tobacco) sectors in the past 10 years. While the WC was disproportionately affected by the drought towards the end of the decade, then the outbreak of COVID-19 in 2020, electricity supply disruptions due to loadshedding, and recent floods, it is worth noting its share of national agriculture and agri-processing remained steady at 16% and 21% mark respectively.

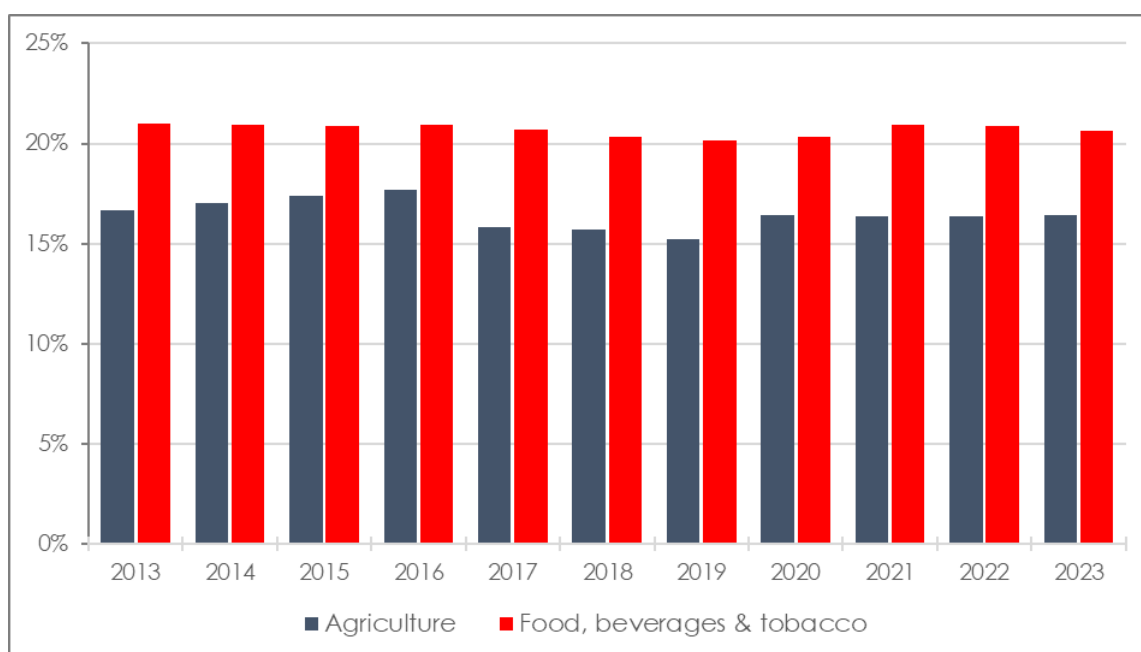


Figure 10: Western Cape share in real national agriculture and Agri-processing GVA, 2013-2023.
Source: WCDoA, 2024

Table 49: Geography of Western Cape GVA: 2023.

	District and Municipalities	Agriculture	Food	Beverages & Tobacco
	City of Cape Town	18,1%	59,0%	63,7%
	City of Cape Town	18,1%	59,0%	63,7%
	West Coast	24,8%	16,6%	13,2%
	Matzikama	5,9%	1,1%	1,3%
	Cederberg	3,7%	2,4%	0,6%
	Bergrivier	6,3%	3,4%	0,8%
	Saldanha Bay	1,6%	3,7%	6,2%
	Swartland	7,2%	5,9%	4,3%
	Cape Winelands	33,4%	12,7%	15,4%
	Witzenberg	7,5%	2,5%	1,5%
	Drakenstein	8,1%	3,6%	5,7%
	Stellenbosch	4,8%	2,6%	4,5%
	Breede Valley	7,8%	2,3%	2,0%
	Langeberg	5,2%	1,9%	1,8%
	Overberg	19,8%	10,8%	7,1%
	Theewaterskloof	6,8%	1,6%	1,2%
	Overstrand	1,1%	1,2%	0,9%
	Cape Agulhas	1,0%	0,6%	0,3%
	Swellendam	1,6%	0,4%	0,3%
	Eden	9,4%	6,9%	4,4%
	Kannaland	1,2%	0,4%	0,2%
	Hessequa	2,0%	0,6%	0,3%
	Mossel Bay	1,0%	1,3%	0,7%
	George	3,3%	3,4%	2,4%
	Oudtshoorn	1,9%	1,3%	0,7%
	Bitou	0,6%	0,3%	0,1%
	Knysna	0,6%	0,6%	0,4%
	Central Karoo	2,8%	0,2%	0,1%
	Laingsburg	0,6%	0,0%	0,0%
	Prince Albert	0,6%	0,0%	0,0%
	Beaufort West	1,5%	0,1%	0,1%

Source: Quantec, 2024

This extent of primary agricultural activities observed within the City of Cape Town is supported by the Indego study 23 which confirms that the greater Philippi Horticultural Area (PHA) is unique and should be retained for horticulture. The Indego study found further that the PHA continues to be actively farmed with at least 89% of the “core” land under production. Thirty horticultural products are being produced with carrots, lettuce, cabbage, spinach and cauliflower being the top five crops. There are about thirty active farmers in the PHA, of which five are classified as large commercial.

The report states that PHA producers are firmly embedded in the WC agricultural value chain through the sourcing of inputs, logistics, services and markets. For every R1 million spent in the vegetable industry 4.65 direct jobs are created and 46.5 indirect jobs translating into the PHA contributing about 3 000 direct jobs and 30 000 indirect jobs to the regional economy. It estimated that the PHA further contributes about R484 million direct and R938 million indirect turnover into the regional economy. It was predicted that this could grow further through more land being made available for farming and the adoption of new technologies.

The WC is more dependent on horticultural production than the rest of South Africa. This is evident from Figure 11 which breaks down the gross farm income of the WC and the rest of South Africa into

income received from horticultural activities, animal-based activities, field crop production and “other activities”.

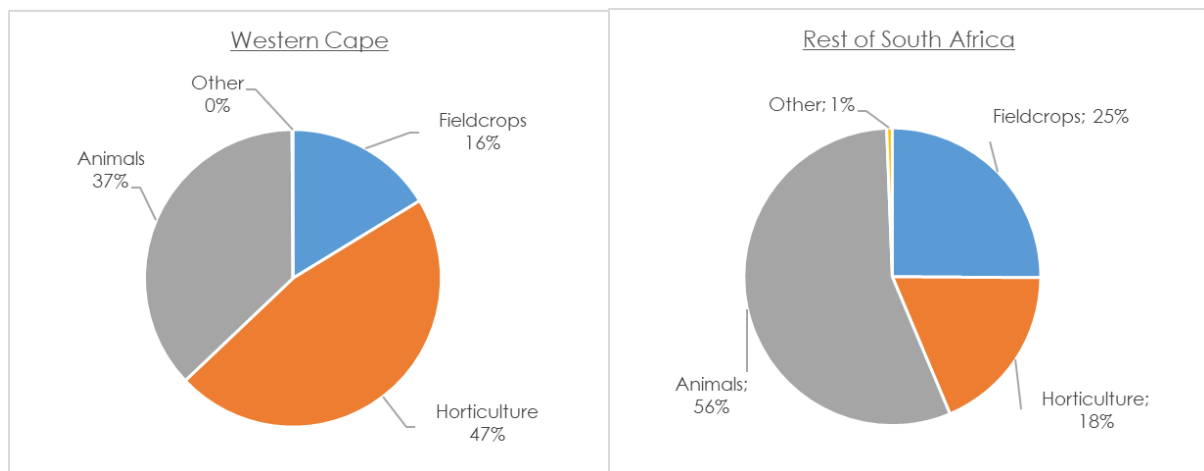


Figure 11: Western Cape and South Africa breakdown of Gross Farm Income by type of farming.

Source: Patridge, Morokong and Sibulali , 2020

For the rest of South Africa outside of the WC, animal-based agriculture accounts for more than half (56%) of farm income. A further quarter (25%) of income is related to field crop production and horticultural activities make up most of the remainder (18%). In contrast, whilst still significant animal-based activities make up only 37% of gross farm income in the WC. Instead, the main income source is horticultural which make up almost half of all income (47%). Field crops make a slightly less significant income component in the WC, compared to what is observed at the national level.

There are significant differences in the breakdown of farm income sources across the WC's different districts as shown in Figure 12. Animal-based agriculture makes up more than 60% of farm income in the Central Karoo and the City of Cape Town, and more than 50% in Eden. These are also the three districts with the lowest total farm income together accounting for only 22% of total farm income in the WC. The Cape Winelands alone accounts for 41% of total provincial farm income, over R23 billion, and has the highest share of income attributable to horticultural activities, accounting for more than 60%. The other two districts, Overberg and the West Coast, also have horticulture as the main farm activity accounting for 46% and 43% respectively, and together account for a further 37% of provincial gross farm income.

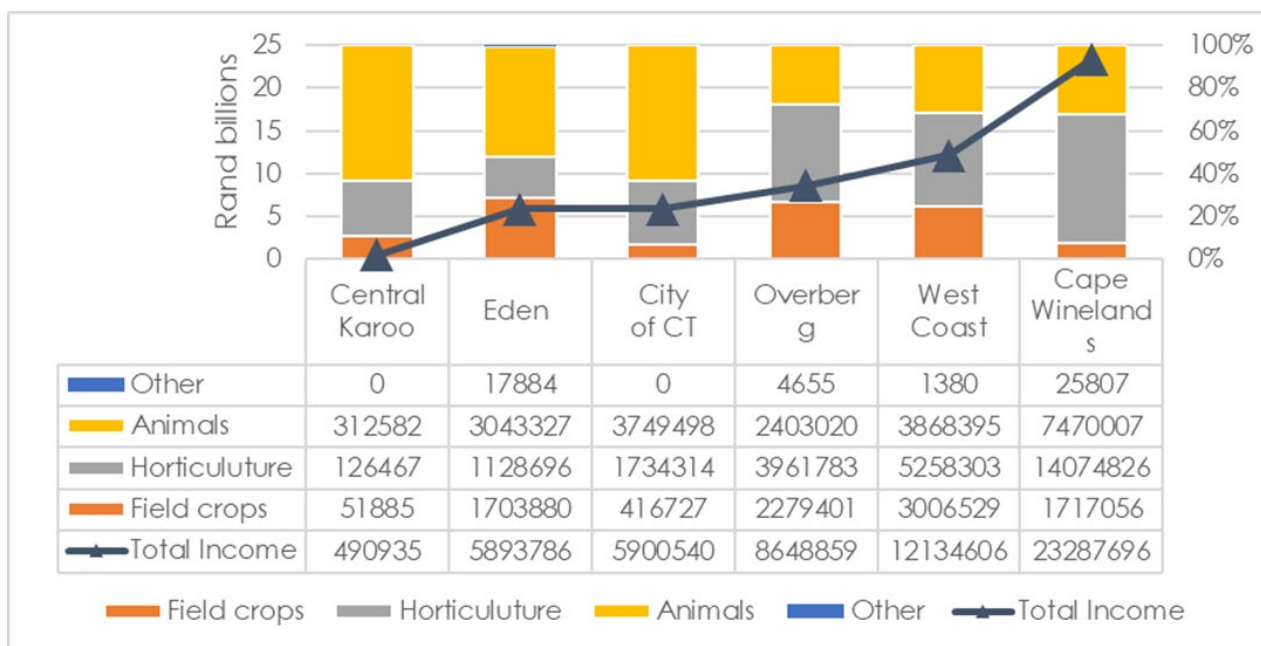


Figure 12: Breakdown of Gross Farm Income by District, 2017.

Source: Patridge, Morokong and Sibulali, 2020

In 2023, approximately 1 044 816 hectares of land were recorded under crop production in the WC. Figure 13 below illustrates the top ten crops in the province which are leading in area size and compares 2017 and 2023. The area under wheat production has increased by 7% (23 231 hectares) in the past 6 years, followed by Oats (151 557 hectares), Canola (43 hectares), and Barley (23 188 hectares), but the area under wine grapes declined by 12% (10 586 hectares) between 2017 and 2023.

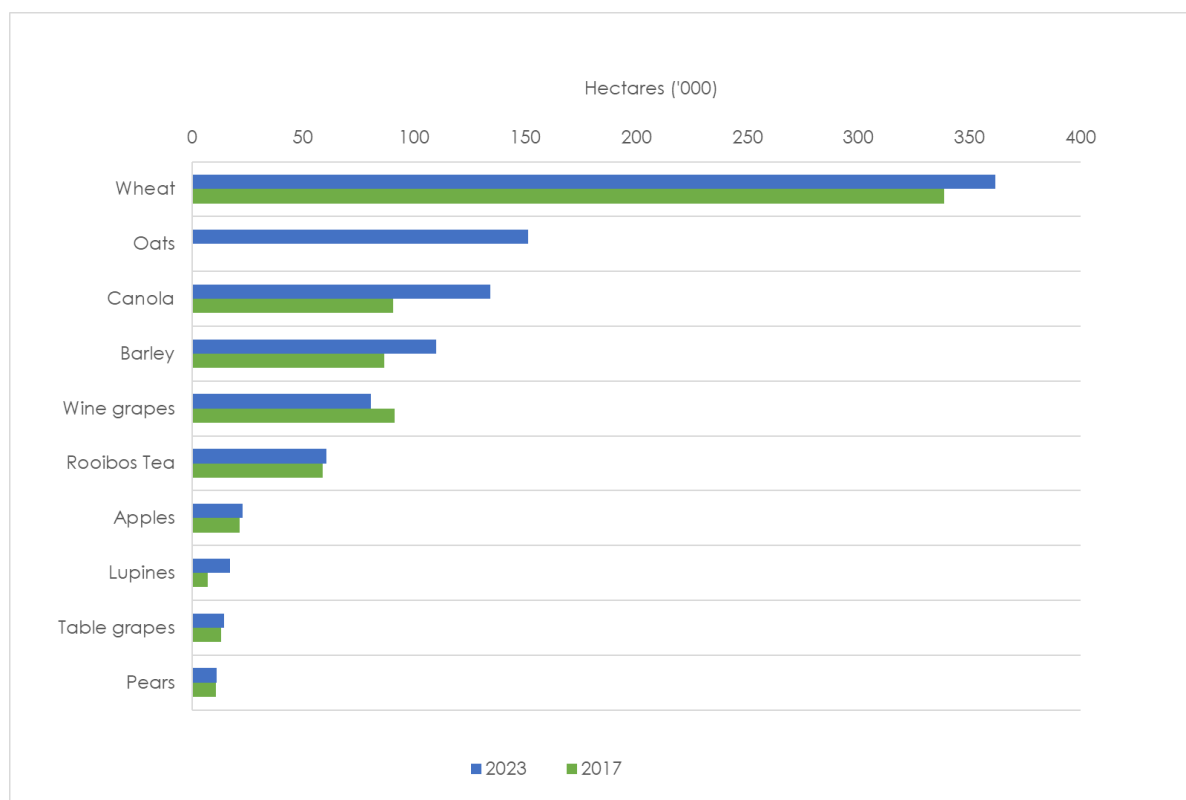


Figure 13: Top WC Crop by Area Planted, 2017 versus 2023.

Source: WCDoA, SIC & OABS, 2024

Most of the province's grain crops, oilseeds and lupines are grown on the West Coast (41%) and the Overberg (33%). The West Coast also has the largest recorded area used to grow vegetables (51%), and almost the entire area used for producing tobacco, teas and hops (98%), mainly due to this being the major rooibos growing region. Over half of the province's orchards are located in the Cape Winelands district (57%). Table 50 below illustrates broad crop categories grown in each WC municipality for the 2022/2023 growing season.

Table 50: Geographic spread of Western Cape crops (ha): 2023

District and Municipalities	Grain, oil seeds, lupines	Orchards	Tobacco, tea & hops	Vegetables	Total
Cape Winelands	52 175	100 809	21	5 237	158 242
Breede Valley	1 868	24 387	-	428	26 683
Drakenstein	24 964	16 075	21	219	41 279
Langeberg	6 793	22 948	-	496	30 236
Stellenbosch	1 801	13 546	-	30	15 377
Witzenberg	16 750	23 853	-	4 064	44 666
Central Karoo	2 088	481	-	360	2 929
Beaufort West	540	60	-	19	619
Prince Albert	1 385	115	-	18	1 518
Laingsburg	163	306	-	323	792
City of Cape Town	23 120	4 869	-	1 580	29 569
Garden Route	131 781	9 084	786	1 650	143 302
Bitou	510	437	104	28	1 079
George	7 374	3 760	481	629	12 244
Hessequa	103 737	1 084	25	59	104 906
Kannaland	2 749	1 977	10	249	4 986
Knysna	432	211	-	138	782
Mossel Bay	10 260	1 162	-	173	11 595
Oudtshoorn	6 718	453	166	374	7 711
Overberg	257 497	21 462	148	574	279 681
Cape Agulhas	83 124	590	39	4	83 757
Overstrand	4 595	1 177	61	45	5 877
Swellendam	85 816	2 706	48	190	88 760
Theewaterskloof	83 962	16 990	-	336	101 288
West Coast	321 062	40 970	60 394	9 614	432 040
Bergervier	100 710	6 085	17 095	3 078	126 967
Cederberg	13 609	12 794	34 310	4 099	64 812
Matzikama	8 594	10 140	6 365	1 977	27 077
Saldanha Bay	33 898	48	1 649	28	35 623
Swartland	164 251	11 903	976	431	177 561
Total	787 723	177 676	61 349	19 014	1 045 763

Note: Table excludes extensive grazing areas

Source: Own compilation based on (Version no.3 of the flyover data, 2024)

According to data from the last ten years, farmland transactions in the Western Cape remained steady at about 780 sales taking place per year up to 2022. The steady demand for land in the rural areas also generated a steady rise in average land price in terms of R/Ha. As can be seen in Figure 14 below, the price of a hectare of rural land was about R8000/ha in 2013 and slowly moved to R14 000/ha in 2019. During these six years, the average price was R12 000/ha.

The COVID-19 pandemic forced many people to change their lifestyles, opened the rural lifestyle to people living in the cities and the demand for land drastically increased. This can be seen in Figure

3.3 with the average R/Ha value of land going from R14 000/ha to R28 000/ha. The value of the land was also further driven by the lack of land entering the market.

The turning point can be seen in 2022 with the price of land dropping from an average of R28 000/ha to R25 000/ha in 2023. It may be too early to say if this trend will continue, but it seems that the market is slowly correcting itself after the high demand for rural land during COVID, which pushed prices up. The Central Karoo, with its bigger sized farms, had the most area change hands with almost 45 000ha sold, and the Cape metropole last with only 286ha changing hands.

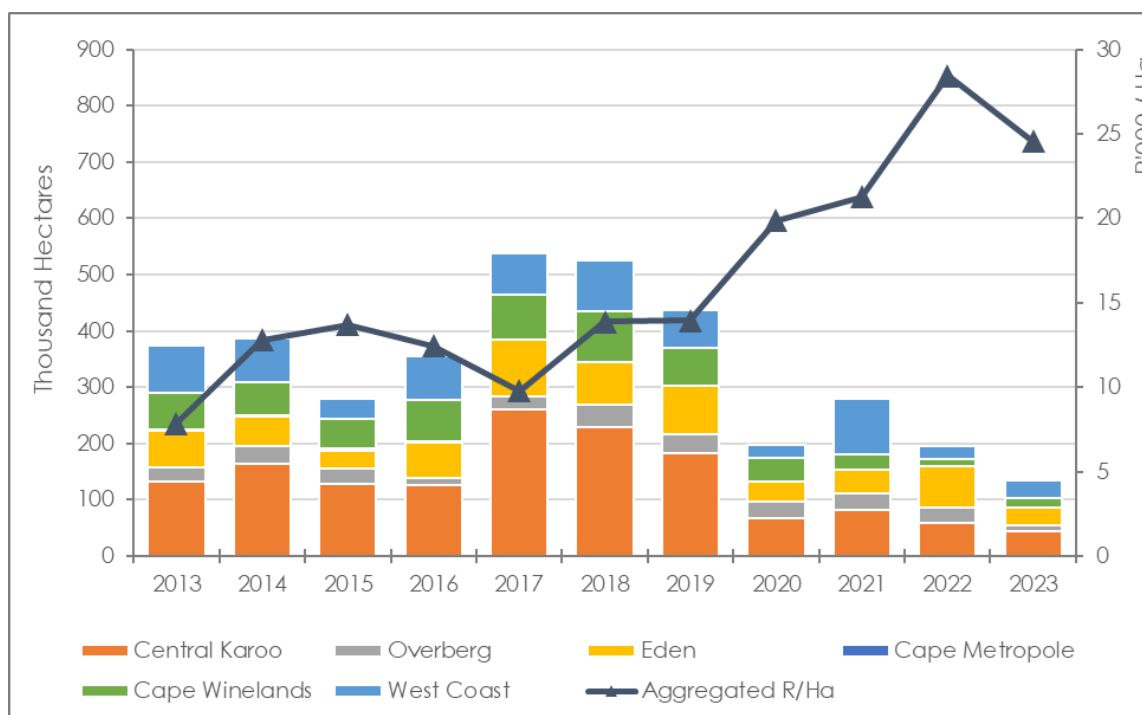


Figure 14: Agricultural Land Transferred and Aggregate Value (2023 prices), 2013-2023.

Source: WCDa, 2024

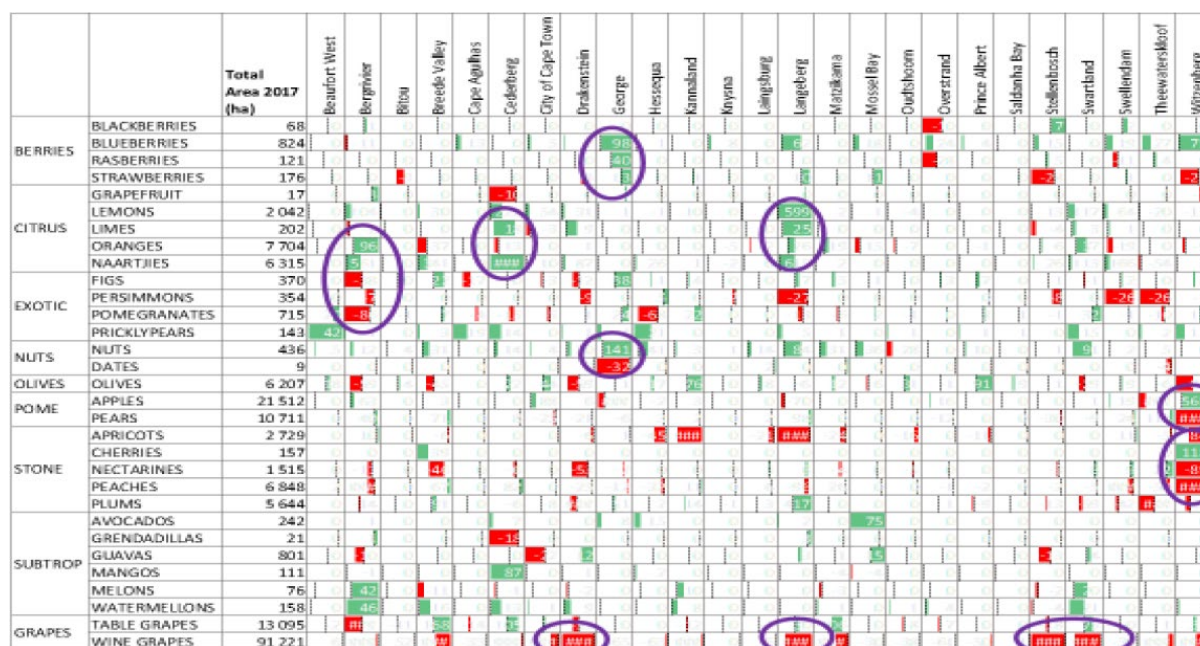


Figure 15: Change in the geographical spread of irrigated crops: 2013 vs 2017.

Source: BFAP, 2018

Figure 16 below illustrates the distribution of agriculture and agro-processing infrastructure in the WC, based on the third iteration of the flyover data. The 2022/2023 agro-processing mapping exercise showed an increase of 20% in the total of fruit packers, cool chain facilities and other agro-processing facilities compared to the 2017/2018 census and a 17% increase in the total pack houses (WCDa, SIC & OABS,2024).

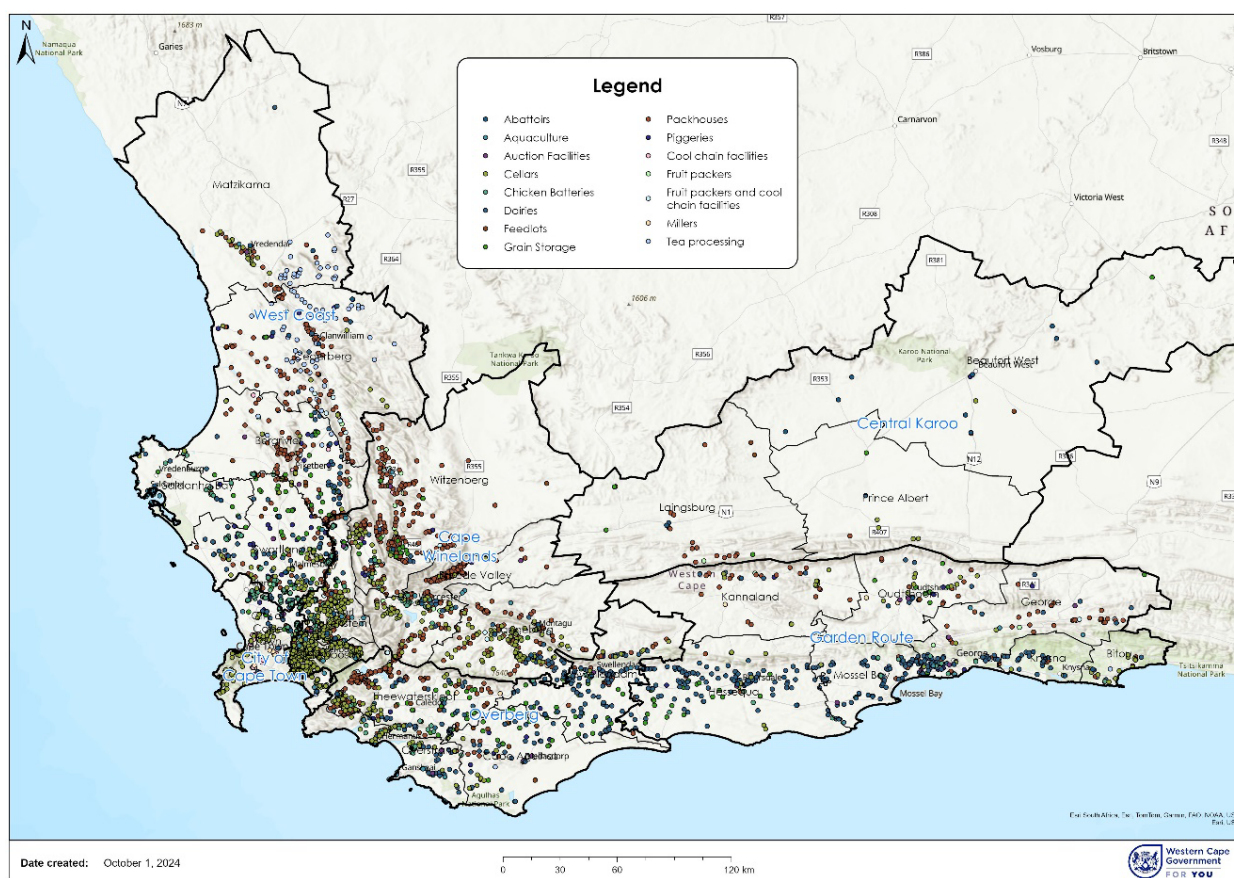


Figure 16: Agriculture and agro-processing facilities (2023).

Source: WCDa, 2024

8.1.4. Agricultural Trade

The WC agricultural sector is export-oriented and focused in the past ten years under observation, despite the key challenges such as seaports and poor road infrastructure, the prevalence of the COVID-19 global pandemic, animal disease outbreaks, environmental related disasters; the agricultural exports have grown significantly and remained resilient and competitive on the global market stage. Similarly, the agricultural imports have remained relatively stable over the same period, but show a slight decline in 2021, and an increase in 2023. However, there is a still widening trade balance for the sector illustrated in Figure 17 below. The WC agricultural exports increased from R60.1 billion in 2022 to R66.9 billion in 2023, and agricultural imports from R5.7 billion in 2022 to R6.4 billion in 2023.

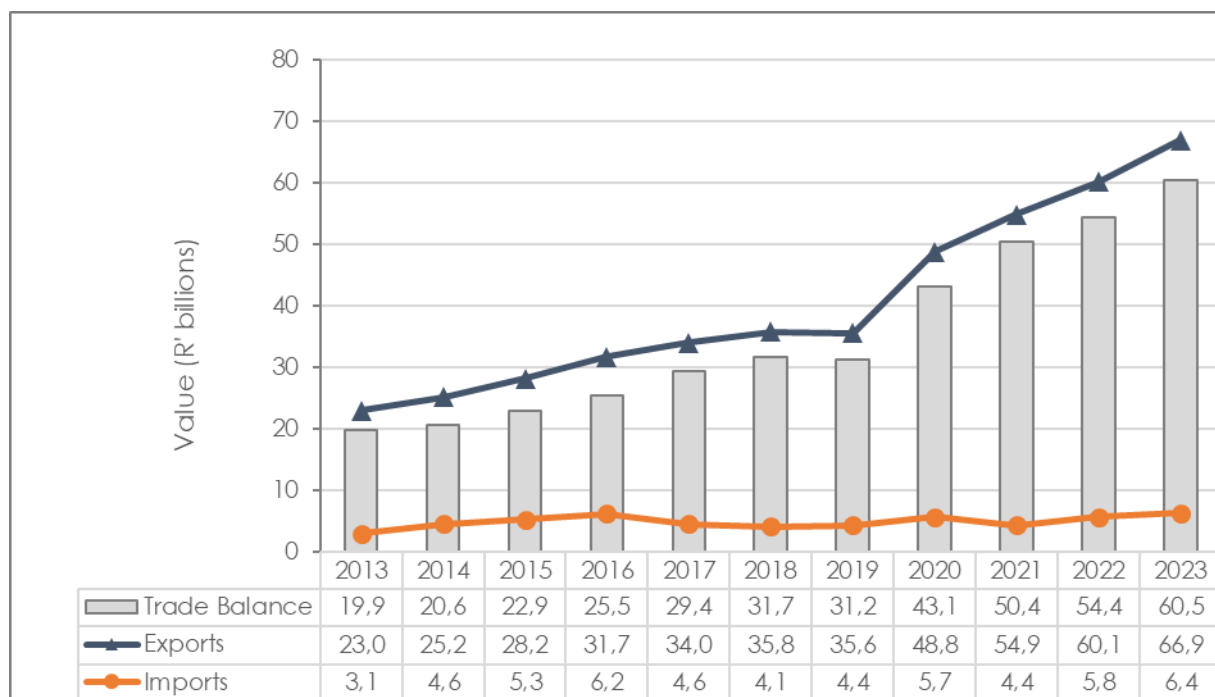


Figure 17: Western Cape Agricultural Trade: 2013-2023.

Source: Quantec, 2024

The FBT sector of the WC has shown an improved and positive economic performance in the past ten years. As shown in Figure 18 below, the exports of FBT products grew strongly between 2013 and 2023, but imports of these products also substantially increased resulting in a modest and relatively flat trade balance. Since 2016 there has been a continued decline in the value of FBT exports until 2019, but from 2022 to 2023 the export values revealed an increase from R35.8 billion to R36.7 billion, respectively. Whereas, on the other hand, the FBT imports showed a slight increase of 8.3% in 2023.

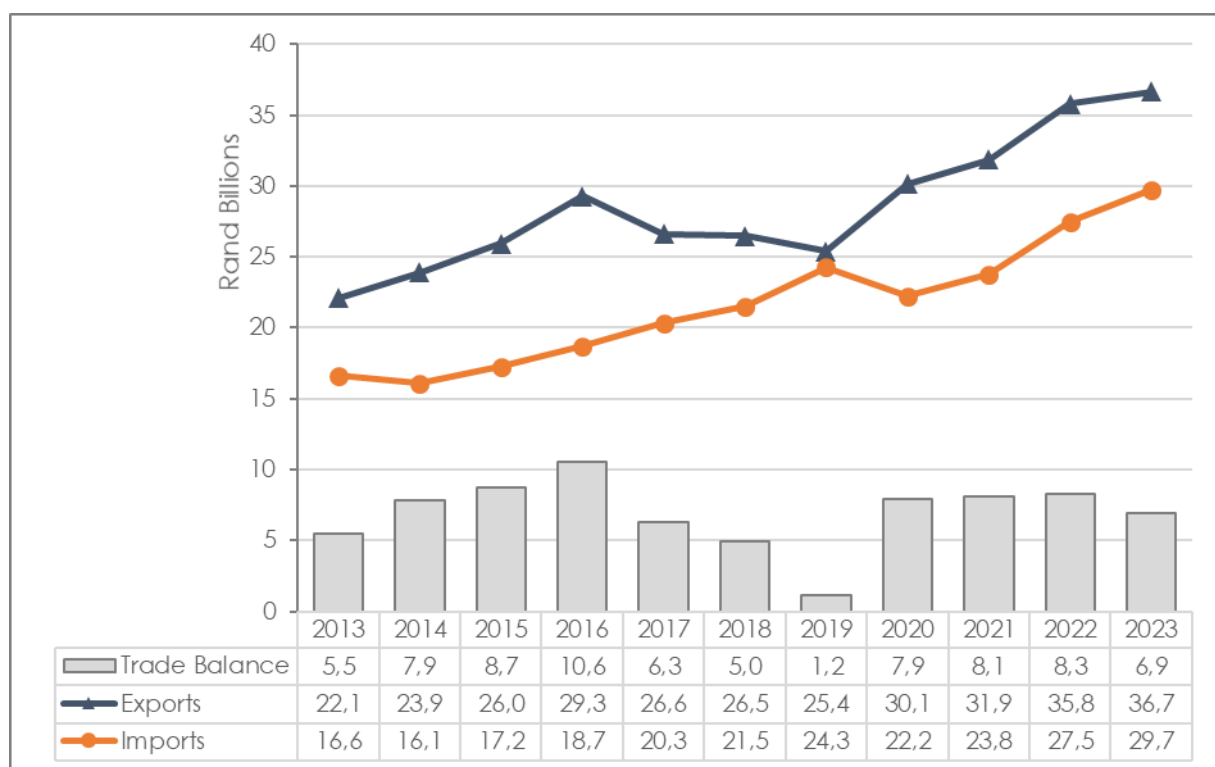


Figure 18: Western Cape Food, Beverage & Tobacco (FBT) Trade: 2013-2023.

Source: Quantec, 2024

The WC's share in both these trade flows (AFF&FBT) are graphically illustrated in Figure 19 below. The WC's agricultural share in the national agricultural exports declined by a marginal 1% (from 50% in 2022 to 49 in 2023). This is slightly lower than the average (51%) over the past 10 years under observation (2013 to 2023), however, this still shows a significant contribution and accounts for half of all South African agricultural exports. The province's share in national agricultural imports increase by 1% (from 19% to 20%) between 2022 and 2023.

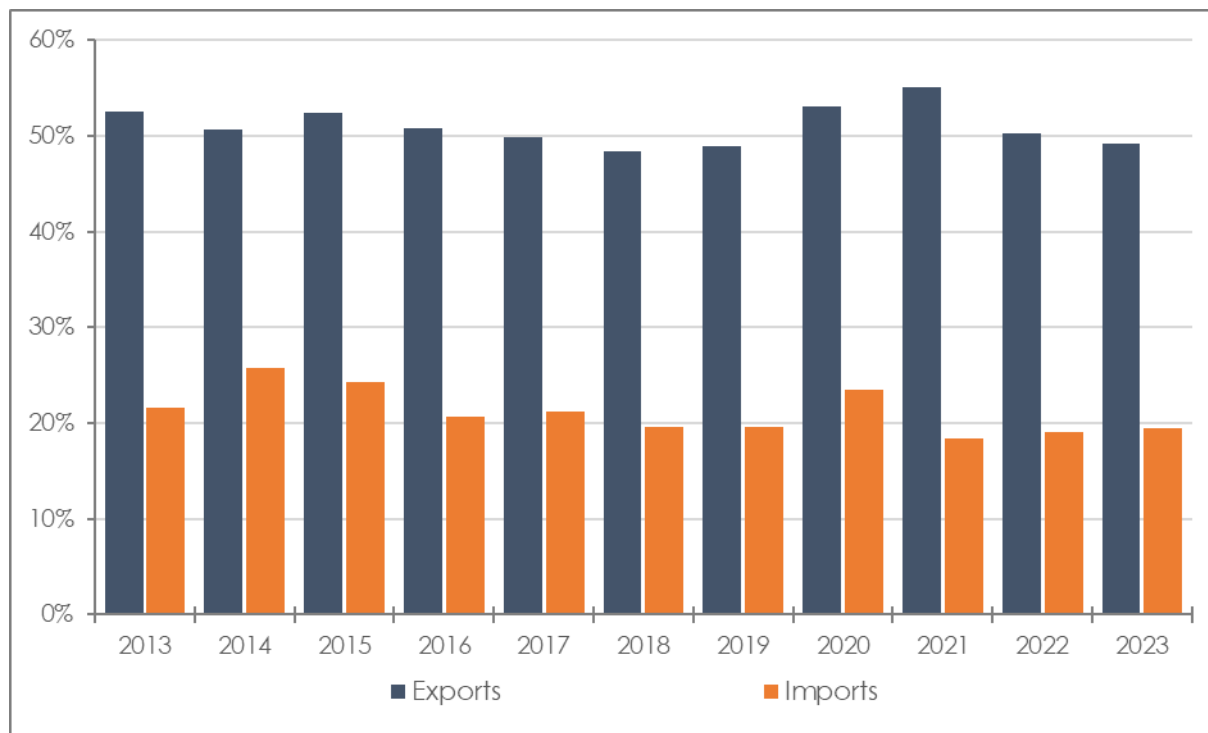


Figure 19: Western Cape Share in National Agricultural Trade: 2013-2023.

Source: Quantec, 2024

The annual WC import and export flows for the FBT segment are illustrated in Figure 20. In 2023, the WC's FBT export share in the national FBT exports recorded 33%, a decline from the previous year by 4%, but overall, for the past ten years, this share has been declining from 43% recorded in 2016. The WC accounts for a third of South Africa's FBT imports.

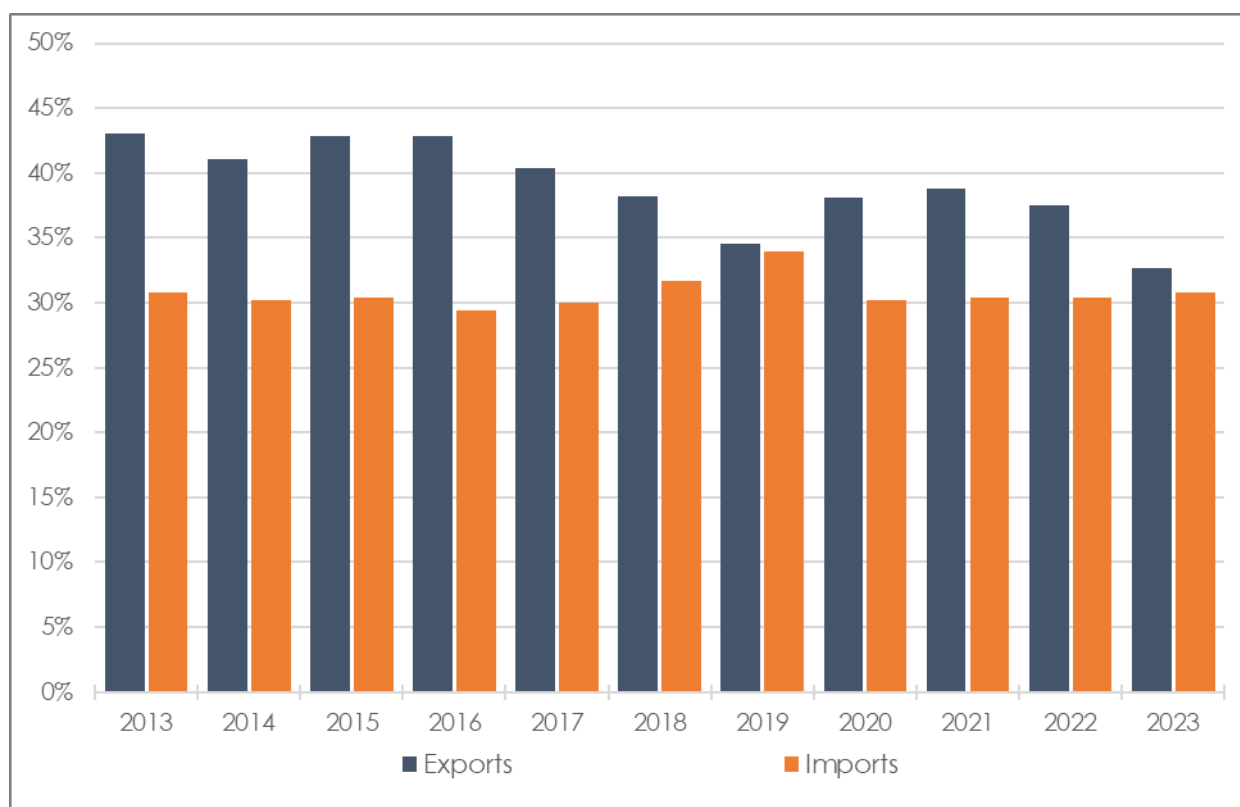


Figure 20: Western Cape Share in National FBT Trade: 2013-2023.

Source: Quantec, 2024

Figure 21 shows the WC agricultural exports to the top ten countries in 2022 and 2023. Most of the WC agricultural exports were destined for the Netherlands (21% or about R14 billion), the United Kingdom (UK) (12% or about R8 billion) and the United Arab Emirates (UAE) (8% or about R5 billion) in 2023. The share of WC agricultural exports increased from the previous year for countries like the UAE (+2%), USA (+1%), and China (+1%) but declined for countries like the UK (-1%), Japan (-2%), Vietnam (-1%) and Canada (-1%). From the previous year, countries like the Philippines, Belgium and Norway observed significant growth rates of 415% to R209 million, 343% to R392 million and 182% to R406 million, respectively. The notable increase in agricultural exports to the Philippines in 2023 was driven by mandarins at R106 million. Similarly, the sharp rise in exports to Norway was attributed to oranges at R261 million in the same year.

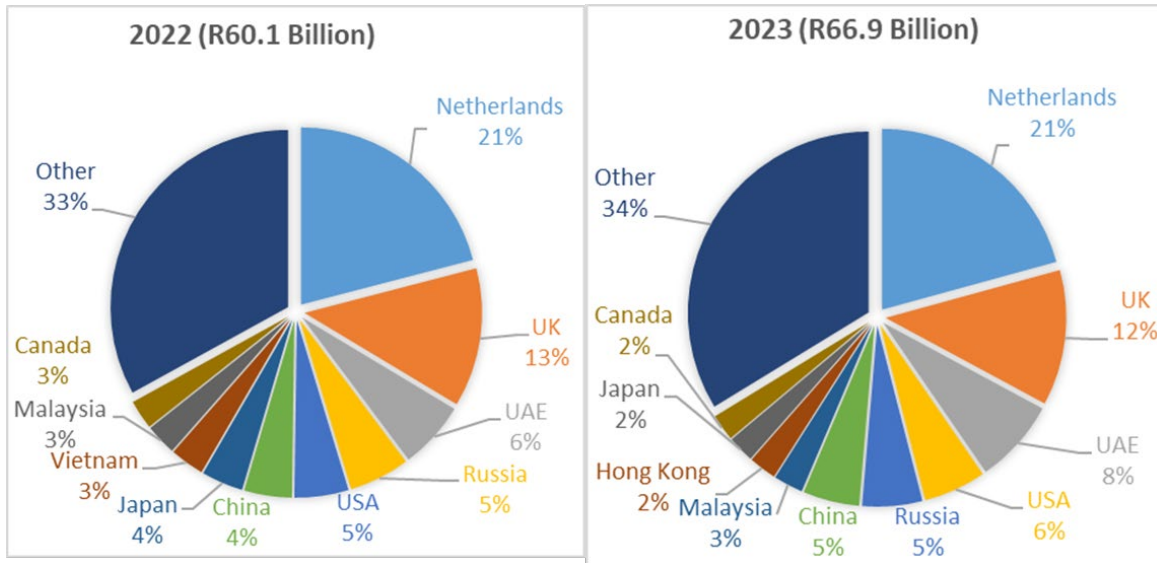


Figure 21: Western Cape Agricultural export destinations – countries: 2022 vs 2023..
Source: Quantec, 2024

Figure 22 illustrates the trends in WC agricultural exports by region from 2022 to 2023. A majority of WC agricultural exports were directed to Europe at 48% (or R32 billion) and Asia at 35% (or R24 billion) in 2023. The main exports to these regions were citrus fruits at R8 billion, apples and pears at R5 billion and maize at R3 billion. The share of WC agricultural exports to the Americas increased from 4% in 2013 to 9% in 2023 while the share to Africa dropped from 12% to 8% in the same period. The agricultural exports to Africa mainly consisted of apples at R2 billion. Africa had a growth rate of 12% to R5 billion from 2022. The WC agricultural exports to the Americas had the highest growth rate of 17% to R6 billion in 2022. The main agricultural exports to the Americas were mandarins at R1.4 billion and oranges at R1.3 billion in 2023.

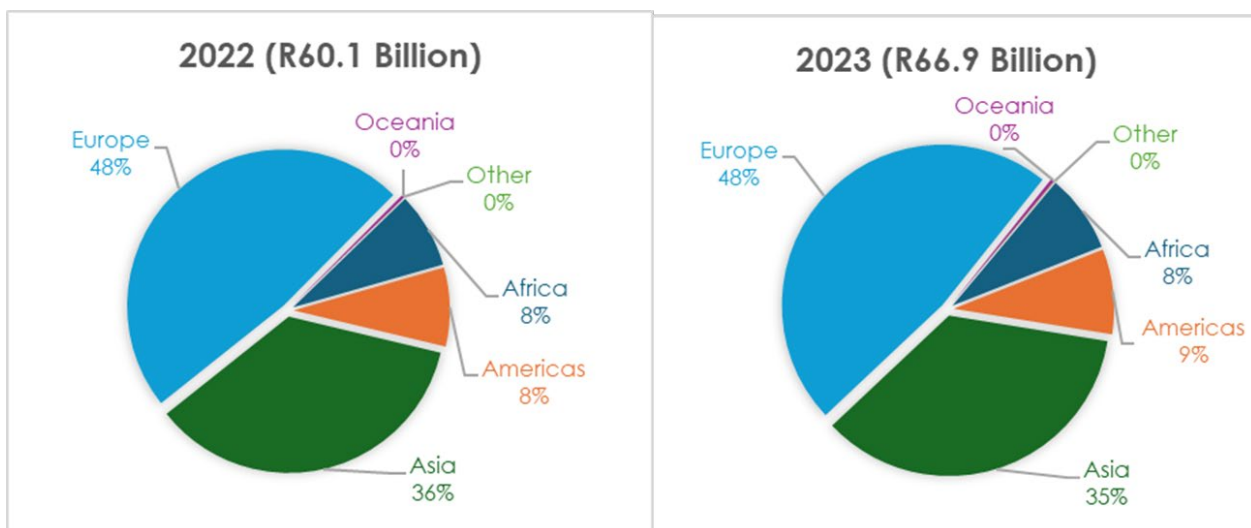


Figure 22: Western Cape Agricultural Export Destinations – Regions: 2022 vs 2023.
Source: Quantec, 2024

Figure 23 shows the WC Food, Beverages and Tobacco (FBT) exports to the top ten countries in 2022 and 2023. Most of the WC FBT exports were destined for the UK (10% or R3.5 billion), Botswana (9% or R3.4 billion) and Namibia (9% or R3.3 billion) in 2023. The FBT exports to the UK mainly consisted of wine of fresh grapes in containers holding 2 litres or less at R1.6 billion in 2023. Botswana and Namibia mainly import fruit juices, wine from fresh grapes, fermented beverages, rice, sauces, and preparations. The share of WC FBT exports increased from the previous year for countries like the UK (+1%), China (+1%) and Swaziland (+1%). Similarly, countries like Peru, Switzerland, Greece and

Poland observed significant growth rates of 77% to R121 million, 69% to R237 million, 68% to R321 million and 68% to R213 million, respectively. The FBT exports to Peru were primarily fruit or nut purées and pastes at R43 million. For Switzerland, the main export was wine made from fresh grapes at R119 million. Exports to Greece mainly consisted of flours, meals, and pellets of aquatic invertebrates at R274 million, while fish fillets, specifically hake, accounted for R130 million in exports to Poland.

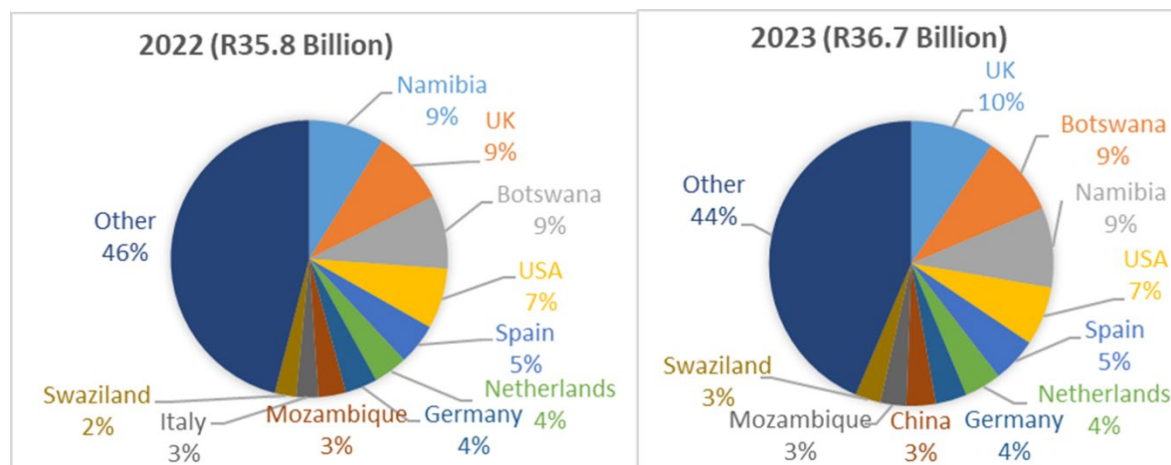


Figure 23: Western Cape top FBT Exports Destinations - Countries: 2022 vs 2023.

Source: Quantec, 2024

Figure 24 demonstrates the trends in WC FBT exports by region from 2022 to 2023. Most WC FBT exports were directed to Europe at 38% (or R13.9 billion) and Africa at 37% (or R13.6 billion) in 2023. The main FBT exports to Europe consisted of wine from fresh grapes at R6.4 billion and fish fillets at R2.1 billion in 2023. Exports to Africa mainly consisted of fresh juices at R1.7 billion and wine from fresh grapes at R1.5 billion in the same year. The share of WC FBT exports to Europe increased from 35% in 2022 while the share to Africa has dropped from 38% in the same period (although Africa had a growth rate of 1%). The WC FBT exports to Europe had a significant growth of 11% from 2022 and exports to the Americas amounted to R3.8 billion in 2023. The exports to the Americas primarily consisted of wine of fresh grapes at R1.3 billion and prepared fruits and nuts at R632 million in 2023.

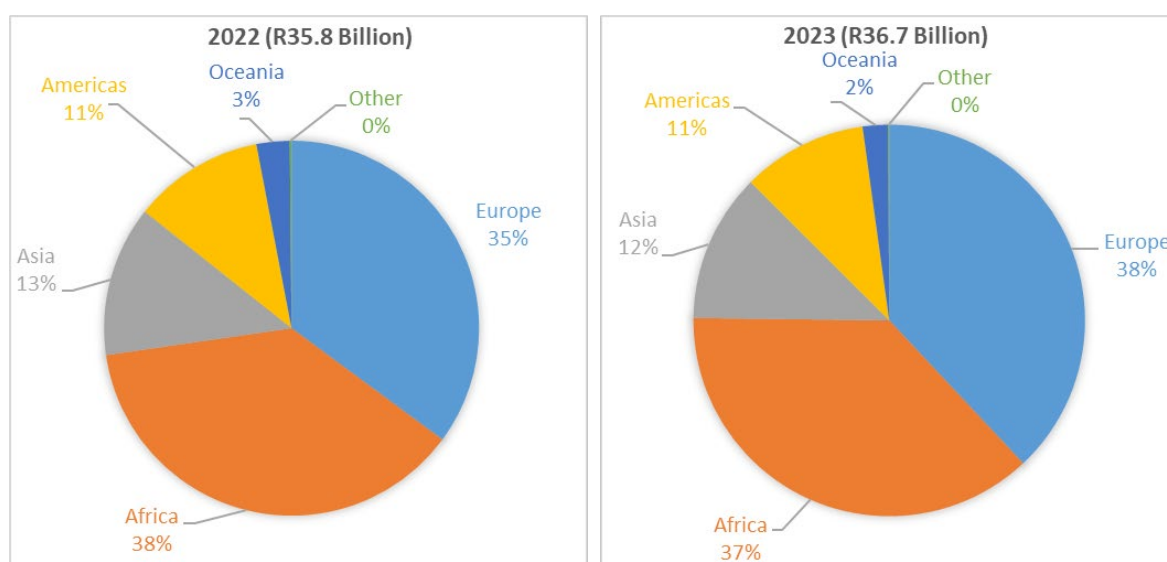


Figure 24: Western Cape top FBT Exports Destinations - Regions: 2022 vs 2023.

Source: Quantec, 2024

Figure 25 indicates the WC agricultural imports from the top ten countries in 2022 and 2023. Most of the WC agricultural imports were from Lithuania (14% or R877 million), Poland (14% or R876 million) and Namibia (10% or R630 million) in 2023. The share of WC agricultural imports increased from the

previous year for countries like Poland (+7%), Spain (+1%), and China (+1%) but declined for countries like the USA (-1%), Brazil (-2%), and Vietnam (-1%). The agricultural imports from Poland were mainly driven by wheat and meslin at R859 million in 2023. Notably, a significant growth rate of 845% to R24 million, 572% to R16 million and 266% to R61 million was observed for countries like Benin, Philippines and Colombia, respectively, from the previous year. Agricultural imports from Benin were primarily driven by shelled cashew nuts, which surged from R2 million in 2022 to R24 million in 2023. The key agricultural import from Colombia was unroasted, non-decaffeinated coffee, valued at R60 million.

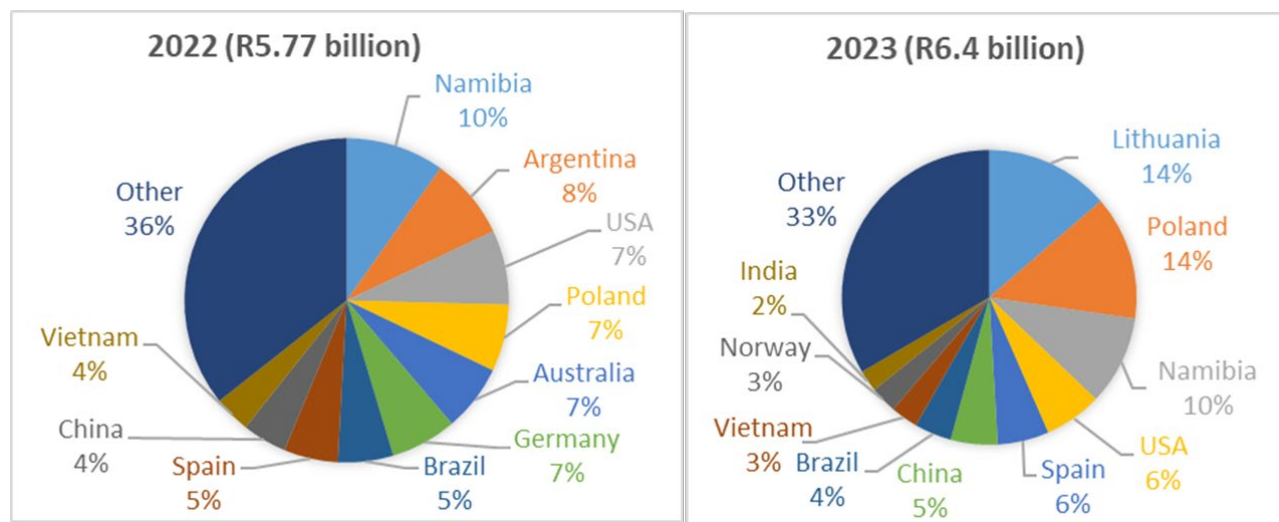


Figure 25: Western Cape Agricultural Import origins – Countries, 2022 vs 2023.

Source: Quantec, 2024

Figure 26 highlights the trends in WC agricultural imports by region from 2022 to 2023. A majority of WC agricultural imports are from Europe at 41% (or R2.6 billion), Africa at 24% (or R1.5 billion) and the Americas at 19% (or R1.2 billion). The share of WC agricultural imports from Europe increased from 26% and 2022 to 41% in 2023 while the share from the Americas dropped from 27% to 19% in the same period. The WC Agricultural imports from Europe had the highest growth rate of 73% in 2022. The agricultural imports from Europe mainly consisted of wheat and meslin at R1.7 billion in 2023. This was followed by Asia at 13% to about R886 million in 2022. The agricultural imports from Asia and Africa mainly consisted of Crustaceans at R205 million and fish at R1.3 billion in 2023, respectively.

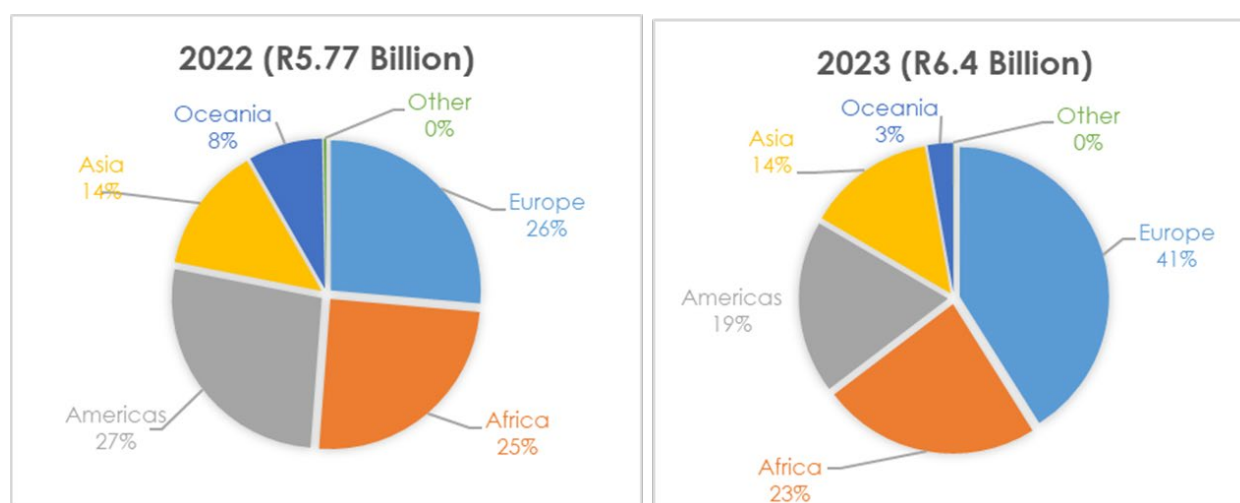


Figure 26: Western Cape Agricultural Import origins – Regions, 2022 vs 2023.

Source: Quantec, 2024

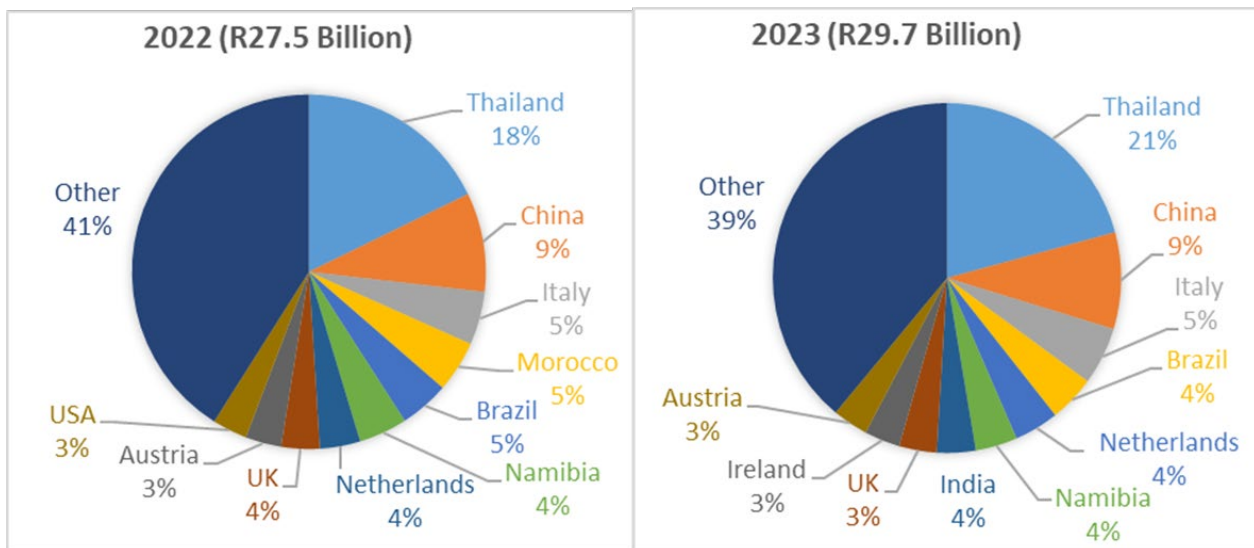


Figure 27: Western Cape FBT Imports Origins – Countries, 2022 vs 2023.

Source: Quantec, 2024

Figure 28 illustrates the trends in WC FBT imports by region from 2022 to 2023. Most WC FBT imports came from Asia at 40% (or R11.8 billion) and Europe at 37% (or R10.9 billion) in 2023. The main FBT imports from Asia mainly consisted of milled rice at R5.2 billion, prepared sardines, sardinella and brisling or sprats at R1.2 billion, and other fruits and vegetable juices at R1 billion in 2023. The share of WC FBT imports from Asia increased 29% while the share from Europe dropped to 37% in 2023. The primary FBT imports from Europe were wheat and meslin at R1.7 billion, waters at R1.3 billion and whiskeys at R1.1 billion in 2023. The WC FBT imports from Asia had the highest growth rate of 20% from 2022. This was followed by Europe at 4% from 2022. On the other hand, WC FBT imports from Africa declined by 6% from 2022 to R3.2 billion.

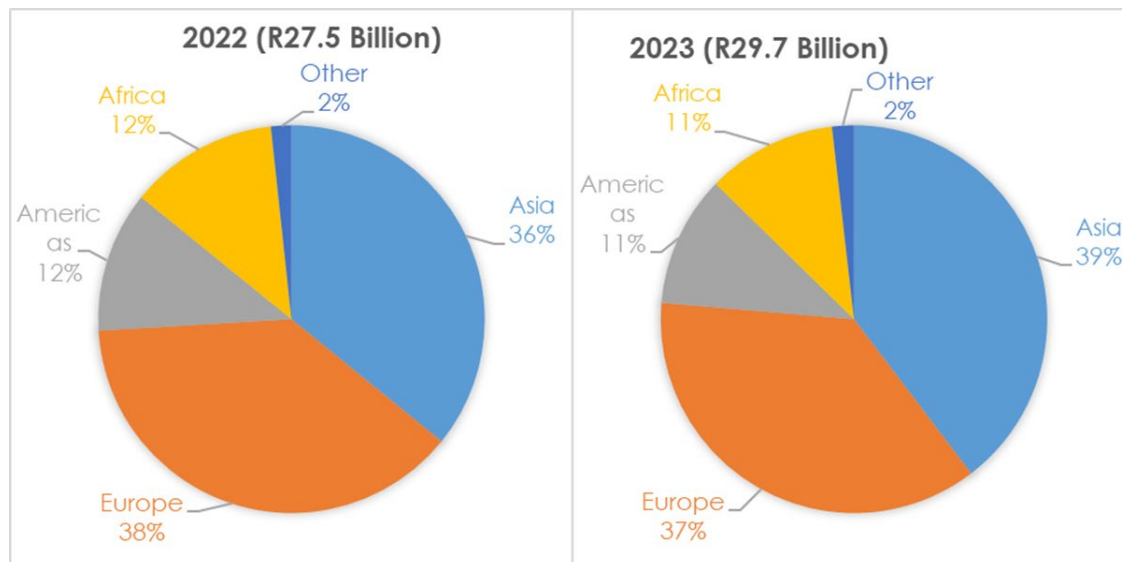


Figure 28: Western Cape FBT Imports Regions – Countries, 2022 vs 2023.

Source: Quantec, 2024

The rest of this section focuses on the value of exports at the specific HS6-digit for agricultural and agri-processing products. The high disaggregated level of product specification allows for certain agri-processing products to be identified that fall under other manufacturing sub-sectors, such as textiles and furniture, where they could not previously be identified at the aggregate product levels.

Agriculture and agri-processing are thus broadly taken into account including agriculture, forestry, fisheries and agri-processing products. Specifically, all products fall under the Harmonised Standard codes (HS): HS01-24; HS31; HS41; and HS50-53 (Patridge & Morokong, 2019).

Therefore, for the rest of this section “agricultural” will be used to refer to all agricultural and agri-processing products excluding forestry and fisheries. Table 51 illustrates the major WC agricultural export product values for 2023, the share (%) and the growth rate over the past year. Oranges stood at the first position, accounting for a share of 9.5% of all the selected agricultural exports in value terms and saw a 20% growth, followed by fresh grapes at 8.8% in the second place amongst the top twenty products ranked. Mandarins in the third place followed by apples and wine<2l, other agricultural products ranking according to their value of exports.

Table 51: Biggest WC agricultural and Agri-processing exports by value 2022 vs 2023.

Rank	HS Code	Product Name	Export Value:2023 (R)	Share (%):2023	Growth(%): 2022-2023
1	080510	Oranges	10 076 669 337	9,5%	20%
2	080610	Fresh grapes	9 320 451 146	8,8%	-11%
3	080521	Mandarins	8 609 002 710	8,1%	35%
4	080810	Apples	8 186 448 026	7,7%	14%
5	220421	Wine <=2l	7 296 335 812	6,9%	3%
6	080550	Lemons	4 064 047 044	3,8%	25%
7	080830	Pears	3 385 471 280	3,2%	-4%
8	100590	Maize(excl. seed)	2 667 885 623	2,5%	56%
9	030474	Hake	2 266 875 165	2,1%	19%
10	220429	Wine incl. fortified wine>10 l	2 260 432 181	2,1%	-9%
11	081040	Cranberries, bilberries	2 040 258 446	1,9%	59%
12	080940	Plums and Sloes	1 609 688 271	1,5%	-10%
13	230120	Flours, meals & pellets of fish	1 578 444 520	1,5%	16%
14	080540	Grapefruit	1 460 346 243	1,4%	1%
15	100510	Maize seed	1 224 564 961	1,2%	-39%
16	220600	Other beverages	1 084 007 579	1,0%	-27%
17	200870	Peaches & nectarines	1 051 938 245	1,0%	-4%
18	200799	Jams, jellies.	984 341 405	0,9%	47%
19	210390	Preparations for sauces	934 099 070	0,9%	6%
20	200990	Mixtures of fruit Juices	933 780 843	.0,9%	11%
		Other agricultural exports	35 201 872 168	33,1%	4%
		Total	106 236 960 075	100%	7%

Source: (Quantec, 2024a)

The fastest growth rate over the past ten years is shown in Table 52 below, along with the share (%) in total WC agricultural exports. These products are ranked according to their highest growth rate recorded in the past ten years under review. The top three products are pistachio nuts in shell, sheep carcasses (excl. lambs) and true hemp (processed) which grew by 262%, 210% and 163%, over the past ten years.

Table 52: Fastest Growing WC agricultural and agri-processing Exports, 2013-2023.

Rank	HS Code	Product Name	Export Value:2023 (R)	Share (%): 2023	10yr Annual Real Growth (%)
1	080251	Pistachios, in shell	20 779 172	0,02%	262
2	020421	Sheep carcasses (excl. lambs)	154 100 618	0,15%	210
3	530290	True hemp, processed	1 413 028	0,00%	163
4	120510	Low erucic acid or colza seeds	297 624 222	0,28%	156
5	020110	Carcasses of bovine animals	57 219 848	0,05%	147
6	510610	Carded wool yarn	11 286	0,00%	121
7	150600	Other animal fats & oils	467 127	0,00%	117
8	511219	Woven fabrics containing >=85% wool	132 690	0,00%	113
9	120242	Groundnuts	2 742 134	0,00%	108
10	411200	Leather further prepared	58 038	0,00%	106
11	410792	Grain splits leather	25 280 794	0,02%	104
12	030771	Clams, cockles and ark shells	228 149	0,00%	102
13	520512	Single cotton yarn	186 102	0,00%	96
14	121140	Poppy straw	12 114	0,00%	94
15	511290	Woven fabrics <85% combed	7 673 631	0,01%	92
16	110720	Roasted malt	851 468	0,00%	91
17	151499	High erucic acide rape or colza oil	2 510 381	0,00%	91
18	100510	Maize seed for sowing	1 224 564 961	1,15%	88
19	410419	Hides & skin of bovine incl. Buffalo	3 100 020	0,00%	88
20	510910	Yarn containing >=85% wool	4 080 238	0,00%	85
		Other agricultural products	104 433 924 054	98,30%	797%

Source: (Quantec, 2024a)

Table 53 shows the biggest WC agricultural imports by value and annual growth rate over a year, ranked by import value in 2023. The leading products are semi or whole-milled rice (13%), wheat & meslin (excl. seed) (4%), and ammonium (ADN) (4%), water including mineral aerated (4%), and sardines (3%) among other biggest agricultural products imported in value terms in 2023.

Table 53: Biggest WC agricultural and agri-processing imports by value: 2022 vs 2023.

Rank	HS Code	Product Name	Imported Value:2023	Share (%):2023	Growth (%): 2022-2023
1	100630	Semi-milled or wholly milled rice	5 319 731 496	13%	44%
2	100199	Wheat & meslin(excl. seed)	1 736 761 671	4%	11%
3	310540	Ammonium(AND) fertiliser	1 685 856 683	4%	-12%
4	220210	Water Incl.mineral & aerated	1 503 814 362	4%	32%
5	160413	Sardines, Sardnella & Brisling or Sprats	1 262 138 727	3%	0%

Rank	HS Code	Product Name	Imported Value:2023	Share (%):2023	Growth (%): 2022-2023
6	220830	Whiskies	1 203 157 557	3%	23%
7	050400	Guts, bladders & stomachs of animals	1 157 566 537	3%	8%
8	200979	Apple juice unfermented	1 087 156 877	3%	-14%
9	030353	Frozen sardines	987 630 068	2%	-45%
10	310210	Urea, whether/not in aqueous	722 615 808	2%	-51%
11	240220	Cigarettes containing tobacco	714 433 470	2%	12%
12	230910	Dog and cat food	631 001 509	2%	15%
13	151190	Palm oil & its fractions	619 405 171	1%	-8%
14	020714	Cuts and offal, frozen	617 733 222	1%	6%
15	200290	Tomatoes(prepared or preserved)	588 778 577	1%	75%
16	230110	Flours, meals & pellets of meat	546 793 790	1%	11%
17	180690	Chocolate & other prep. Cont. cocoa	518 462 389	1%	28%
18	210690	Food preparations	476 142 951	1%	-22%
19	030474	Frozen fillets of hake	440 486 647	1%	7%
20	200969	Grape juice	428 457 003	1%	31%
		Other agricultural imports	19 241 881 184	46%	4%
		Total	41 490 005 699	100%	4%

Source: (Quantec, 2024a)

Again, observing the growth rates of agricultural imports regardless of the base amount, Table 54 shows that potassium sulphate grew by 176.6% over the past ten years. This was followed by single flax yarn (164%), germ of cereals (139%) and crude coconut oil (138.5%), respectively.

Table 54: Fastest Growing WC agricultural and agri-processing Imports, 2013-2023.

Rank	HS Code	Product Name	Imported Value:2023	Share (%): 2023	10yr Annual Growth (%):2013-2023
1	310430	Potassium sulphate	22 621 243	0,1%	176,60
2	530610	Single flax yarn	4 859 100	0,0%	164,40
3	110430	Germ of cereals	127 959	0,0%	139,05
4	151311	Crude coconut oil	6 626 285	0,0%	138,54
5	071151	Mushrooms	392 442	0,0%	131,44
6	151211	Crude Sunflower-seed	402 149 388	1,0%	123,73
7	071030	Spinach, New Zealand	2 727 324	0,0%	118,25
8	170390	Beet molasses (of sugar)	775 774	0,0%	109,12
9	071420	Sweet potatoes	492 328	0,0%	106,51
10	200840	Pears	403 983	0,0%	102,29
11	150790	Soya-bean oil	250 464 034	0,6%	96,11
12	071430	Yams	622 009	0,0%	92,06
13	070890	Other leguminous vegetables	638 598	0,0%	87,27

Rank	HS Code	Product Name	Imported Value:2023	Share (%): 2023	10yr Annual Growth (%):2013-2023
14	170310	Cane molasses	15 734 710	0,0%	83,47
15	080390	Bananas (excl. plantains)	42 672 863	0,1%	79,76
16	121300	Cereal straw and husks	188 381	0,0%	78,96
17	090720	Cloves (whole fruit)	2 243 820	0,0%	76,84
18	151190	Palm oil	619 405 171	1,5%	75,45
19	520299	Cotton waste	2 570 168	0,0%	73,24
20	030341	Albacore or long finned tuna	18 690 688	0,0%	70,94
		Other Agricultural Imports	40 095 599 431	96,6%	69,28

Source: Quantec, 2024a
Risk and trend analysis

8.1.5. Relevant stakeholders contributing to the achievement of outcomes.

It was established in Section 3 that South Africa has three distinct spheres of government, leading to the situation represented in Figure 29. National government consists of a number of departments and statutory bodies. These agents of state usually have offices or branches geographically located in the area of responsibility of provinces. At the same time some tertiary institutions, although established under national legislation, is also situated in one or more province with an associated provincial footprint. Provinces, being a distinctive sphere of government, have their own range of organs of state (departments and statutory bodies) accountable only to the Provincial Parliament. At local level, still within the geographical area of provinces, the three types of municipalities (local, district and metro/city) have their own set of functions, responsibilities and lines of accountability. Furthermore, each of these organs within each sphere has a particular mandate outside which any expenditure will be unauthorised.

This complexity can partially be described from the viewpoint of a hypothetical small scale farmer. This farmer received a land reform farm from the Land Reform Branch of the (national) Department of Agriculture, Land Reform and Rural Development and an operational loan from the (national) Land Bank. Infrastructure needs gets funded via the Comprehensive Agricultural Support Programme (CASP) which is a programme of the (national) Department of Agriculture and implemented by provincial departments of agriculture. However, to build a shed he must get approval from the local municipality which will grant approval according to guidelines developed at provincial level at the hand of prescripts provided by national legislation. Additional water, a prerequisite for successful farming in most areas of South Africa, is a competency of the (national) Department of Human Settlements and Water Affairs. Before he can export his apples he needs inspection from the (national) Perishable Products Export Control Board (PPECB), but the export of animal products needs to be licensed by the (provincial) veterinary services. Should his products not make the grade for export, it will be sold at local (municipal) markets.

Given this complexity, a large number of (unschooled) smallholder farmers struggle to access the range of services available to them. The same principles apply to other agricultural activities such as research, protection of the natural environment, training, exports, etc. With the wide range of actors from different spheres of government having a stake in agriculture, it is easier to develop consensus on agricultural matters with private sector players than between organs of state.

The complexity of the relationships and inter-linkages of the people living on Western Cape farms are not much better than the case of organs of state. These people can be grouped into three broad categories (see Figure 30):

a) The owner of the farm or, in the cases of absentee owners, the most senior manager.

- b) Farm workers. Although some live in towns or “agri-villages” and commute on a daily basis to the place of work, by far the greater majority still lives on the farm.
- c) Other people living on the farm. In a number of instances these people are not necessarily working on the farm.

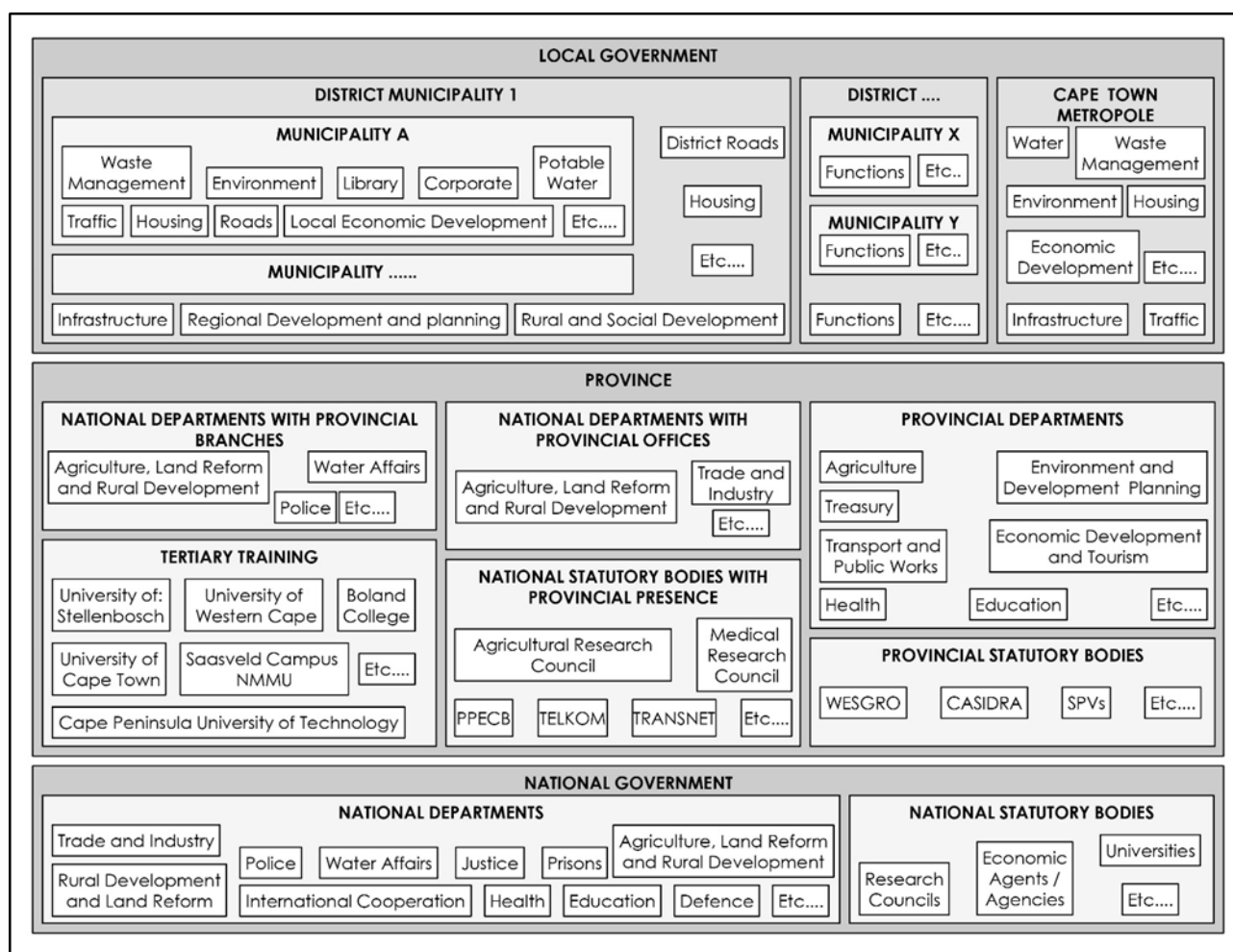


Figure 29: Schematic representation of institutional silos in government.

Source: Adapted from Troskie (2013)³⁸

The majority of commercial farmers belong to a farmers' association and/or one or more industry organisations which jointly form Agri Western Cape and eventually Agri South Africa. However, in some instances certain industry organisations are loosening its ties with the Agri West Cape structures and are finding alternative administrative homes in newly established organisations. Although there is currently no credible alternative structure representing commercial farmers in the Western Cape, TAU SA does exist at national level and is attempting to expand into the Western Cape. This association has politically more conservative objectives and is increasingly becoming involved in non-agricultural issues. There are also a range of other organisations such as AfriForum, Solidariteit and Saai with specific agendas being pursued.

There are currently three organisations representing smallholder farmers in the Province. The first is the Western Cape Branch of the National African Farmers Association (NAFU) and the second is the African Farmers Association of South Africa (AFASA). There are also a range of other organisations such as Black Farmers Association of South Africa (BFASA) and United South African Agricultural Association (USAAA).

³⁸Troskie, DP (2013) Provinces and agricultural development: challenge or opportunity? Agrekon 52 (1): 1 – 27.

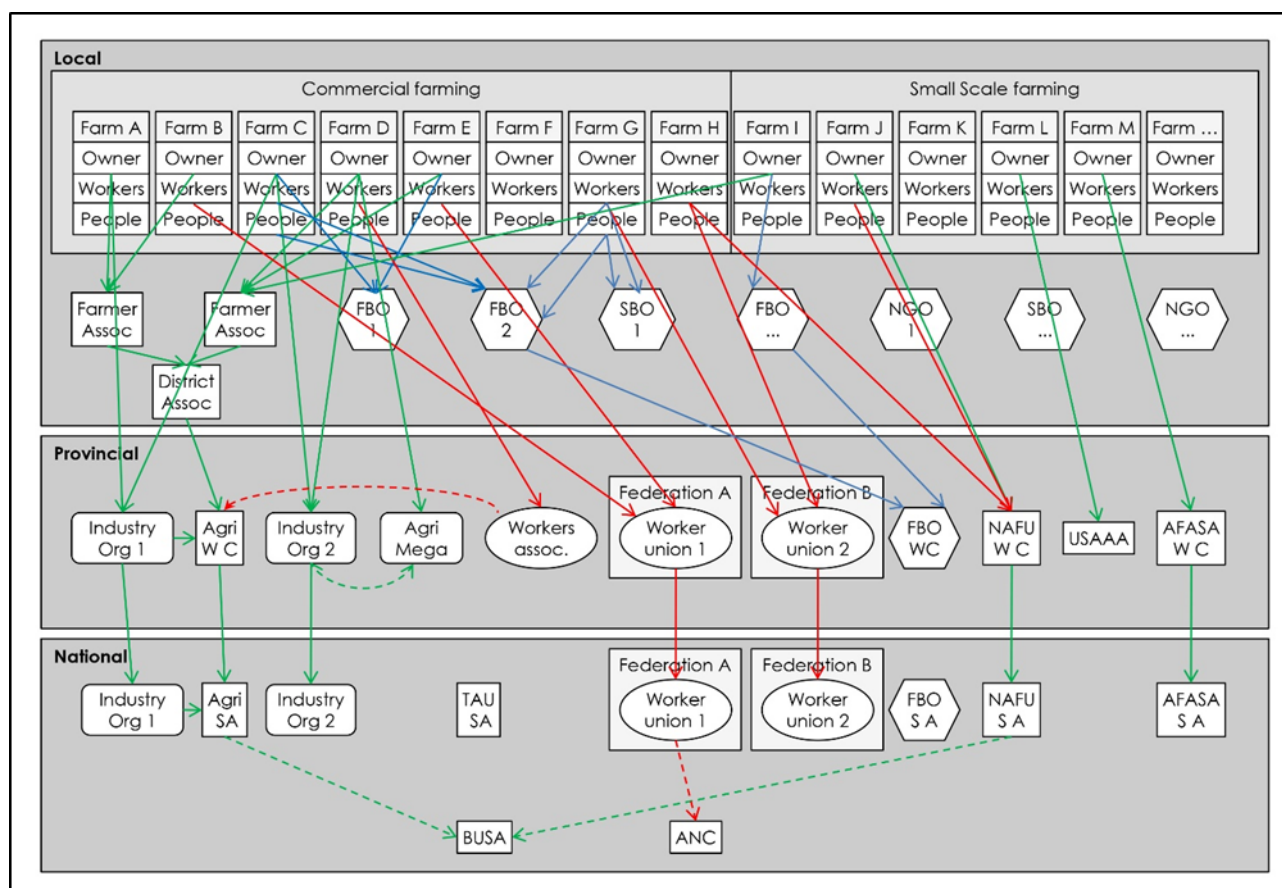


Figure 30: Schematic representation of some of the actors in the Western Cape Agricultural Sector.

Source: Adapted from Troskie (2013)

Within and between these organisations (whose actual paid-up membership remains a secret) there are often differences of opinion and personality clashes. Organisations representing the interests of the other people living on farms (workers and rural dwellers) are even in a worse disarray of diversity. A number of labour unions and worker organisations represent some of the farm workers as well as workers in associated industries (i.e. canning, transport, etc.). A number of these labour unions (i.e. Food and Allied Workers Union (FAWU)), are affiliated to the Congress of South African Trade Unions (COSATU). Other worker federations with agricultural related affiliated unions include the Federation of Unions of South Africa (FEDUSA) and the National Council of Trade Unions (NACTU). Nevertheless, most farm workers in South Africa remain un-unionised.

An even wider range of organisations maintain that they speak on behalf of the people living on farms and, sometimes, also on behalf of farm workers. This range of organisations include faith-based organisations (FBOs), community based organisations (CBOs) and other non-governmental organisations (NGOs). Most of these organisations are dependent on donor money and their activities range from specific or general advocacy of real or perceived challenges faced by people living on farms (i.e. Women on Farms) to addressing particular concerns (i.e. Foetal Alcohol Syndrome).

In addition to these stakeholders, the Western Cape agricultural sector is privy to information that is important for planning and decision making at least in the short and medium term. This is possible through partnerships like the Bureau for Food and Agricultural Policy (BFAP). In collaboration with GreenCape, the department has established a GreenAgri Portal, which is a web-based platform and a one-stop tool targeted at clients and stakeholders interested in getting involved in the green economy. Through this partnership, the sector also benefits from the services of the Agri Desk i.e. an annual Market Intelligence report that is a collection of research conducted to stimulate the uptake

of smart agri production and green solutions, like renewable energy generation on-farm. In a sector that needs to create more jobs, increased investment is therefore vital. However, for a number of years, the sector has been suffering from declining investments. Hence, the partnership with Wesgro through the Agribusiness Investment Unit is critical to look at promotion of the agricultural sector and to facilitate investment into the sector. Furthermore, relations with export councils and commodity associations, standard setting bodies, relevant government institutions (provincially and nationally) are critical for market access and for synergies in market development initiatives locally and abroad.

The Programme: Structured Agricultural Education and Training will continue to strengthen existing partnerships and build new partnerships to optimise the use of limited resources and alignment with industry needs, especially:

- a) The host farmers accommodating students during Workplace Integrated Learning,
- b) Academic support for scientific innovation and input to curriculum development, accreditation and quality assurance of courses,
- c) International exchange of students,
- d) Industry initiatives to position the college as a centre of excellence.

8.2. Internal Environment Analysis

8.2.1. Capacity to deliver on mandate: Human Resources

There are currently 1 592 posts on the approved organisational establishment of the Department (this number excludes the posts in the Ministry), of which 899 are funded. Of this 899 funded posts a total of 793 is permanently filled as at 7 January 2025. This means that the Department is 49,8% staffed to deliver on its mandate.

In assessing the future capacity needs of the department the funded posts allocation over the past three MTEF periods were studied. The graph below illustrates the flat-lining (no growth in staff capacity) and marginal decline of the number of funded posts in the department over the last 15 years.

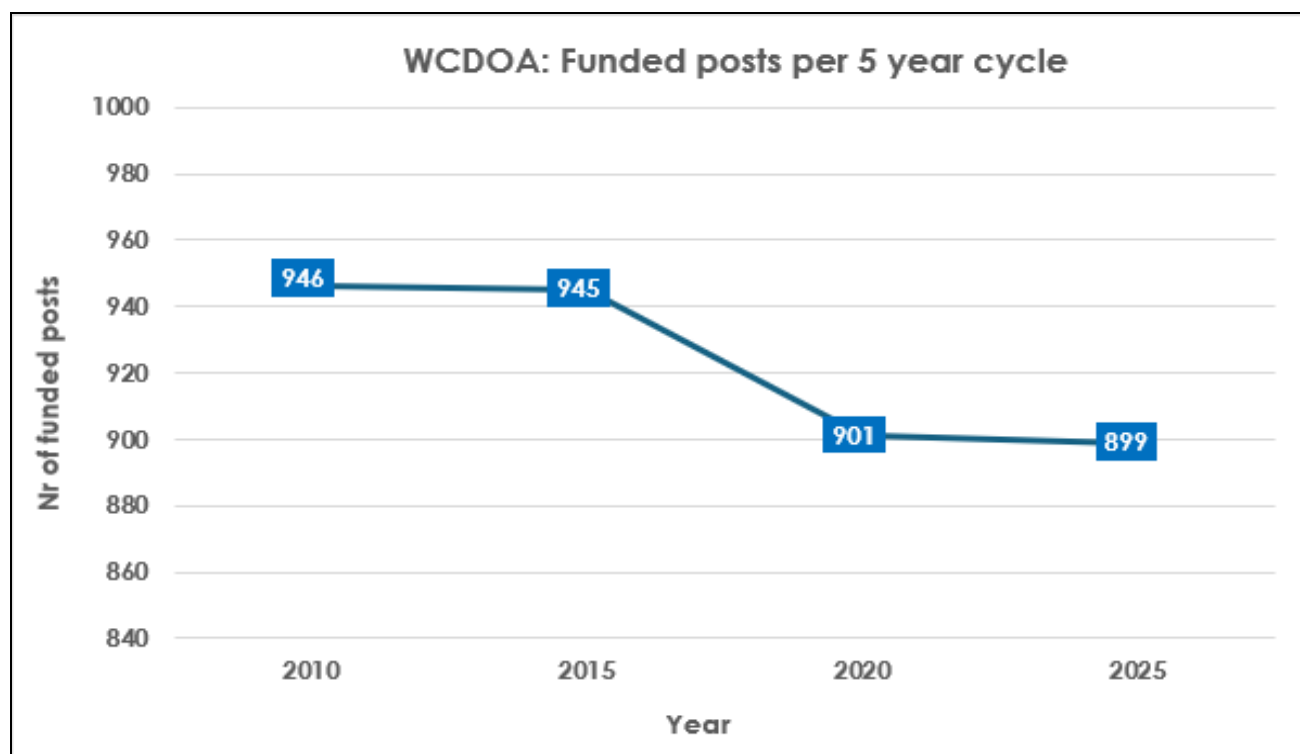


Figure 31: Number of funded positions in the WCDoA at the beginning of each 5-year cycle.

Source: Own calculations (2025)

The projection for the next five years is that the fiscus will remain constrained and that the best scenario facing the department is that it maintains its number of funded posts and even grows this between 3 - 5%. An optimistic outlook suggests that the number of funded posts in 2029 should be a total of 940.

In terms of age profile, it is of strategic importance to note that a relatively high number of staff members in the middle and senior management services are at already retirement age (see the table below). The table also provides detail on the age profile of all permanent staff and also gives an indication of retirements at the age of 65 over the next 5 years and also over the next 5-10 year period.

Table 55: Age and post level of permanent staff in the WCDoA.

AGE	SL1-5	SL6-8	SL9-12	SMS	TOTAL
18-34	55	33	14	0	102
35-54	247	149	121	9	526
55-59	47	22	34	4	107
60-65	19	18	18	3	58
TOTAL	368	222	187	16	793
% Retirements in 5 years ('25-'30)	5.2%	8.1%	9.6%	18.8%	7.3%
% Retirements in 10 years ('31-'35)	12.8%	9.9%	18.2%	25.0%	13.5%
Total % retiring before 2035	17.9%	18.0%	27.8%	43.8%	20.8%

Source: Own calculations (2025)

Table 56: Age and critical occupational groups of permanent staff in the WCDoA.

Job Title / Age	No of staff in age group					% Retirements in 5 years ('25-'30)	% Retirements in 10 years ('31-'35)	TOTAL retirement before 2035
	18-34	35-54	55-59	60-65	TOTAL			
Scientist	2	12	5	3	22	13.6%	22.7%	36.4%
Scientific Technician	4	17	6	2	29	6.9%	20.7%	27.6%
Lecturer	7	11	2	4	24	16.7%	8.3%	25.0%
Engineer	0	0	2	0	2	0.0%	100.0%	100.0%
Engineering Technician	1	10	1	3	15	20.0%	6.7%	26.7%
State Veterinarian	7	10	5	1	23	4.3%	21.7%	26.1%
Veterinary Technician	7	50	8	1	66	1.5%	12.1%	13.6%
TOTAL	28	110	29	14	181	7.7%	16.0%	23.8%

Source: Own calculations (2025)

To mitigate the impact of these retirements the Department must take an aggressive approach in terms of training and development to ensure that a competent talent pool is available to ensure business continuity.

The department is on the back foot in terms of senior management staffing capacity and has for the longest time pushed way above its weight in terms of ensuring that outputs and targets are met.

The current status is:

- a) A total of 33 SMS posts reflect on the approved organizational structure and staff establishment.

- b) Of these 33 posts, only 20 are funded.
- c) Of this 20, 17 is filled as at 21 Jan 2025 and the remaining 3 posts are in the process of recruitment.
- d) However, a total of 13 posts are unfunded.
- e) In essence, nearly 40% of the senior management structure remains unfunded.

The department must impress on the Provincial Treasury to release additional funding for the funding of at least 5 SMS posts over the MTEF to strengthen the management function of the department and to position the department to achieve even greater levels of service delivery and innovation.

8.2.2. Capacity to deliver on mandate: Information Technology

Since the previous Strategic Plan update the Department has now been migrated from the Agrinet environment to Openet to create a single network in the Western Cape. The full migration's progress is currently "on hold" due to cost pressure of the fiscal envelope.

With respect to the hardware side of IT, the Department is at the forefront of using technology efficiently. Due to its rural nature, the Department embarked on erecting a wireless network in 2024 that would connect all its offices (45) throughout the Province and has now come full circle by stabilising the network with redundancy connections towards all areas. This has resulted in a network so stable that the Department could replace its very expensive and outdated telephone exchange system with a Voice Over Internet Protocol (VOIP) system with very attractive cost saving results. Bandwidth is regularly increased as new technologies become available. However, current migration prescripts and planning has temporarily restricted progress in order to standardise hardware in this regard, as well as finding the budget to finalise this. Thus: This part of the migration is currently not progressing until budget constraints are effectively solved.

The Department has a Disaster Recovery Site off premises for improved continuity and security.

The provincial electronic content management system has been implemented in the department.

It is envisaged that services and tools will expand in the next five years and capacity and excellence in this field will have to be built. The ICT capacity of the department will subsequently have to be supportive of these initiatives.

The Department provided short term, medium term and long-term towards the 30-year vision of the Departmental Technology Infrastructure and these will direct any development going forward:

The Department aims to integrate cutting-edge technology, combining tractors, sensors, telecommunications, and traditional farming equipment with big data analytics, data services, secure backups, machine learning, and Artificial Intelligence (AI), creating a seamless agricultural ecosystem that enhances productivity, optimises resource use, and drives sustainable growth through intelligent, data-driven decision-making for short-, medium- and long-term planning. Therefore, many of the below have a carry-through effect to the medium- and long-term.

8.2.2.1. Priorities for the Short-term planning range (1 to 5 years)

- a) Investigate and implement a stable hybrid telecommunication system at acceptable bandwidth, i.e., the most efficient combination of data communication within rural Western Cape (for decentralisation of the combination of broadband, fibre, satellite – not one, but all).
- b) Investigate and implement various sensors (Internet of Things (IOT) and non-communicative) for animals, plants, GIS and climate change.
- c) Automated instruments, e.g., drones and farming implements.
- d) Investigate AI, Machine learning and the required hardware to run these applications (local and cloud-based).

In addition, and in order to prepare the Department for changes in the external environment, the WCDoA will conduct a diagnostic and design evaluation during 2025/26 on the impact of AI on the Western Cape Agricultural Sector as well as implications for service delivery on the WCDoA.

The strategic interventions listed are considered enablers for the achievement of the strategic outcomes and indicators of the Department. The annual performance plan and annual ICT operational plan provides more detailed information on existing and planned digitalisation interventions linked to strategic outcomes of the Department.

8.2.2.2. Priorities for the Medium-term planning range (5 to 15 years)

- a) Continuously improve telecommunication technology for increased efficiency and bandwidth.
- b) Where viable, investigate and implement, e.g., data telecommunication between different technologies: direct centre communication to autonomous implement (e.g. tractor).
- c) Enhance robotica to be linked with IA.
- d) Hardware applications: Investigate the use of AI vis a vis Artificial General Intelligence (AGI).

8.2.2.3. Priorities for the Long-term planning range (15 to 30 years)

- a) Continuously improve telecommunication technology for increased efficiency and bandwidth.
- b) Investigate and implement advanced IA and quantum computing telecommunication systems (immediate direct communications versus current bit-by-bit systems).
- c) Sensor technology to be improved and adapted to quantum computing.
- d) Seamless integration of AGI with robotica through quantum computing.

8.2.3. Capacity to deliver on mandate: Financial Resources

With respect to funding resources, the Department is dependent on the fiscus for 96.1% of its funding. The Department is not a revenue seeking institution, therefore, only 3.9% of its funding consists of external revenue. With the exception of paying students, all other revenue of the Department are spin-offs from either research (e.g. milk from dairy cows part of feeding trials), or incidental. Services such as laboratory services are there for internal purposes; and where capacity is available these services are rendered on a limited scale and on a cost recovery basis. The principle is not to compete with the taxpayer with resources paid by the taxpayer. The Department views doing so as unethical. Thus - since the national fiscus is under pressure, so is the Department's, and may become even more so with any form of accelerated land reform.

All transversal systems (BAS, LOGIS, PERSAL and Vulindlela) are outdated and only provide the bare minimum with regard to accounting services. There is little or no management support available and analytical work is almost always done on spreadsheet. This is not ideal. Budgeting remains an Excel exercise with limited capacity for needs and often stability challenges.

With regard to personnel, the Department has done well despite being severely understaffed. Very capable and experienced individuals could only achieve continuous good results through continuity in key positions. However, by adhering to answering to fiscal constraints, the Chief Directorate: Finance could capacitate one senior management level. One major continuity challenge has been addressed- the appointment of a new Chief Financial Officer (CFO) and a Director: Financial Management.

Elsenburg previously housed laboratories and a research farm but has evolved over time and became the administrative head office of the department housing more than 60% of its staff. The building is in dire need of modernisation.

This is being addressed through the Modernisation of Elsenburg project, a major project that would have been completed in phases over the past five years. The project has officially commenced on 18 September 2019, and will bring about legislatively compliant new laboratories, a new conference

centre, and modernised office space that will be constructed in a way that will provide far better use of existing space. Once again, a constrained budget has now caused at least a five-year expansion of the last three phases of this project.

Service delivery have been affected during this period of renovation and construction and is expected to continue doing so for the extended period. Large cost implications are also envisaged as the department will have to carry the cost of all new office furniture and network connections.

8.2.4. Budget in the context of the 5-year Strategic Plan

As previously mentioned, a few very powerful drivers will determine the budget environment for Agriculture over the next five years. The expected introduction of an accelerated land reform process (with or without compensation) will be central to all plans and resource allocation. This will be closely followed by the intensifying impact of climate change and natural disasters and extreme weather patterns that seem to accompany it. In the Western Cape the emphasis will be on job creation and increased exports. Renewed budgetary emphasis on women, youth and the disabled is also expected.

All the above, often seemingly contradictory factors, will, as before, make proper budgeting and planning a challenge. The only constant here seems to be a severely constrained fiscus. Thus – a very volatile period is expected which will demand regular re-assessments of mandatory actions. Since the Department seems to get closer to its fiscal cliff, radical downscaling, or even stopping certain mandatory functions are not impossible. That is, if budgetary allocations are not going to follow the set priorities.

8.2.5. Status of the Department regarding compliance with the B-BBEE Act

The Department has been doing business with suppliers and/or service providers since inception of the B-BBEE Act 53 of 2003 as amended by Act 46 of 2013. The implementation of the said Act has always been done in accordance with its 2011, 2017 and most recent 2022 Preferential Procurement Regulations. To give effect to the regulations, all suppliers/service providers were required to be registered on the Western Cape Government's Western Cape Supplier Evidence Bank (WCSEB) that houses all B-BBEE certificates. All transactions where the Department does business would then export the B-BBEE certificate levels from the Evidence Bank, extract the points for B-BBEE and calculate it to the price in order to attain a total preference point for award.

As part of the Agri-Sector B-BBEE Charter driven by the Department of Agriculture, Land Reform and Rural Development (DALRRD), the Western Cape Department of Agriculture (WCDoA) provides annual data inputs (i.e., spend in relation to B-BBEE companies) for monitoring purposes to all elements that speak to Agri-Sector Charter.

Table 57 shows the total amount of payments made for each B-BBEE Level for the 2023/24 Financial Year:

Table 57: Payments made for each B-BBEE Level for the 2023/24 Financial Year.

Percentage of Expenditure per B-BBEE Level (%)								
Fiscal Quarter Supplier Category	Quarter 1 Payment Amount	% of Quarters Total Spend	Quarter 2 Payment Amount	% of Quarters Total Spend	Quarter 3 Payment Amount	% of Quarters Total Spend	Quarter 4 Payment Amount	% of Quarters Total Spend
B-BBEE Contributor	R12,230,344.81	28.55%	R21,801,419.84	38.77%	R21,135,292.36	44.66%	R28,581,348.24	49.55%
Level 1	R10,007,158.11	23.36%	R17,486,876.30	31.10%	R15,833,556.28	33.46%	R22,068,506.60	38.26%
Level 2	R1,040,729.89	2.43%	R2,284,991.18	4.06%	R2,087,088.90	4.41%	R3,039,528.18	5.27%
Level 4	R1,038,241.34	2.42%	R1,817,502.02	3.23%	R1,943,497.32	4.11%	R3,288,586.02	5.70%
Level 8	R138,665.22	0.32%	R212,050.34	0.38%	R305,076.52	0.64%	R135,798.25	0.24%
Level 7	R5,550.25	0.01%			R636,919.29	1.35%	R10,616.81	0.02%
Level 3					R301,185.77	0.64%	R38,312.38	0.07%
Level 5					R27,968.28	0.06%		
CSD Supplier	R16,585,890.48	38.71%	R22,993,689.89	40.89%	R16,067,364.35	33.95%	R19,208,212.56	33.30%
Non-Contributor	R5,917,829.49	13.81%	R8,777,225.03	15.61%	R9,574,438.11	20.23%	R9,514,579.64	16.50%
Other Beneficiaries	R8,111,743.56	18.93%	R2,655,994.85	4.72%	R543,143.00	1.15%	R372,862.33	0.65%
Total	R42,845,808.34	100.00%	R56,228,329.61	100.00%	R47,320,237.82	100.00%	R57,677,002.77	100.00%

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The table above illustrates the impact at 49.55% of B-BBEE spend which is progressive movement toward the right direction in terms of supporting the B-BBEE initiatives.

8.2.6. Status of the Department regarding women and people with disabilities

The employment of women and people with disabilities is described in Table 58.

Table 58: Employment of women and people with disabilities as at 7 January 2025.

Salary Level	Females			People with disabilities		
	No	% of total workforce	% of staff on salary level	No	% of total workforce	% of staff on salary level
1-2	84	3.4%	26.3%	0	0.0%	0.0%
3-5	155	16.8%	48.7%	6	0.7%	2.0%
6-8	87	14.3%	59.0%	4	0.5%	1.9%
9-12	126	11.4%	44.2%	9	1.0%	4.0%
13-16	12	0.9%	40.0%	0	0.0%	0.0%
Total	464	46.9%		19	2.2%	

Source: Own calculations (2025)

The Department made good progress with respect of employment of females and people with disabilities over the last 15 years. In principle any organisation can only appoint females/people with disabilities if posts become vacant and the vacancies remain funded. Against the background of a declining personnel budget and staff complement over the last 15 years (Table 59) the Department showed improvement despite a declining number of available vacancies.

Table 59: Change in the female and people with disabilities share in the staff of the WCDoA over the past 15 years.

Year	% Females	% PWD	Total no of permanent staff
2010/11	40.6%	1.9%	968
2016/17	43.5%	2.0%	898
2019/20	43.8%	2.1%	894
2022/23	44.5%	2.8%	858
7 Jan 2025	46.9%	2.2%	793

Source: Own calculations (2025)

The Department is aware of a few employees who choose not to declare their disability status. In terms of law, an employer cannot force an employee to disclose her/his disability status. On enquiry these employees indicated that they will only declare disability status if they require reasonable accommodation, which they do not require at this point. Subsequently, one can reasonably assume that there are more employees with disabilities of whom the Department is not aware of.

As mentioned in par 8.2.1, there is a high number of MMS and SMS members that will retire in the next 10 years. While this poses a challenge with regard to loss of institutional knowledge and skills, it can also be utilised as an opportunity since resulting vacancies can be used to address race, gender and people with disabilities representation. It is specifically noted that 40.4% of males in the MMS and 55.6% of males in the SMS will retire over the next 10 years.

Table 60: Age profile by salary and gender

AGE / SL	SL1-5		SL6-8		SL9-12		SMS		TOTAL M	TOTAL F	TOTAL
Gender	M	F	M	F	M	F	M	F	M		
18-34	36	19	15	18	7	7	0	0	58	44	102
35-54	137	110	61	88	52	69	4	5	254	272	526
55-59	35	12	14	8	23	11	3	1	75	32	107
60-65	11	8	13	5	17	1	2	1	43	15	58
TOTAL	219	149	103	119	99	88	9	7	430	363	793
% Retirements in 5 years	5.0%	5.4%	12.6%	4.2%	17.2%	1.1%	22.2%	14.3%	10.0%	4.1%	7.3%
% Retirements in 10 years	16.0%	8.1%	13.6%	6.7%	23.2%	12.5%	33.3%	14.3%	17.4%	8.8%	13.5%
TOTAL retirement by 2035	21.0%	13.4%	26.2%	10.9%	40.4%	13.6%	55.6%	28.6%	27.4%	12.9%	20.8%

Source: Own calculations (2025)

8.2.7. Causality model for the Department

Up to this part of the Strategic Plan of the Department, the policy and strategy expectations from the Department has been analysed. This has been followed by an analysis of the external environment as well as the internal environment. The next step will be to incorporate all into a causality model for the Department. This causality model has been revisited during the WCDoA's Strategic Session and changes to the primary conditions of production as well as the feedback loop between economic growth, food security and jobs were made.

Agricultural production is, according to the father of economics, Adam Smith, nothing but the combination of natural resources (e.g. land and water), labour (e.g. skills) and capital during the production process. More recently the value of knowledge (intellectual capital) has also been added as one of the primary resources. Agricultural research is nothing but to find more efficient ways in using these resources during the production process. Primary production can be in the form of either subsistence (urban or rural), communal (collective or commonage), smallholder (resource poor or lifestyle), or commercial production (small, medium or large). The outputs from primary production will go either directly to households, markets (domestic or export) or to secondary production (i.e. agri-processing or other forms of value adding). From secondary production, the value-added products then flow to domestic or international markets. However, it is important to note that secondary agricultural production (value adding) is very seldom only dependent on local primary production, but will inevitably also include products obtained from domestic or exports (import) markets (see Figure 32).

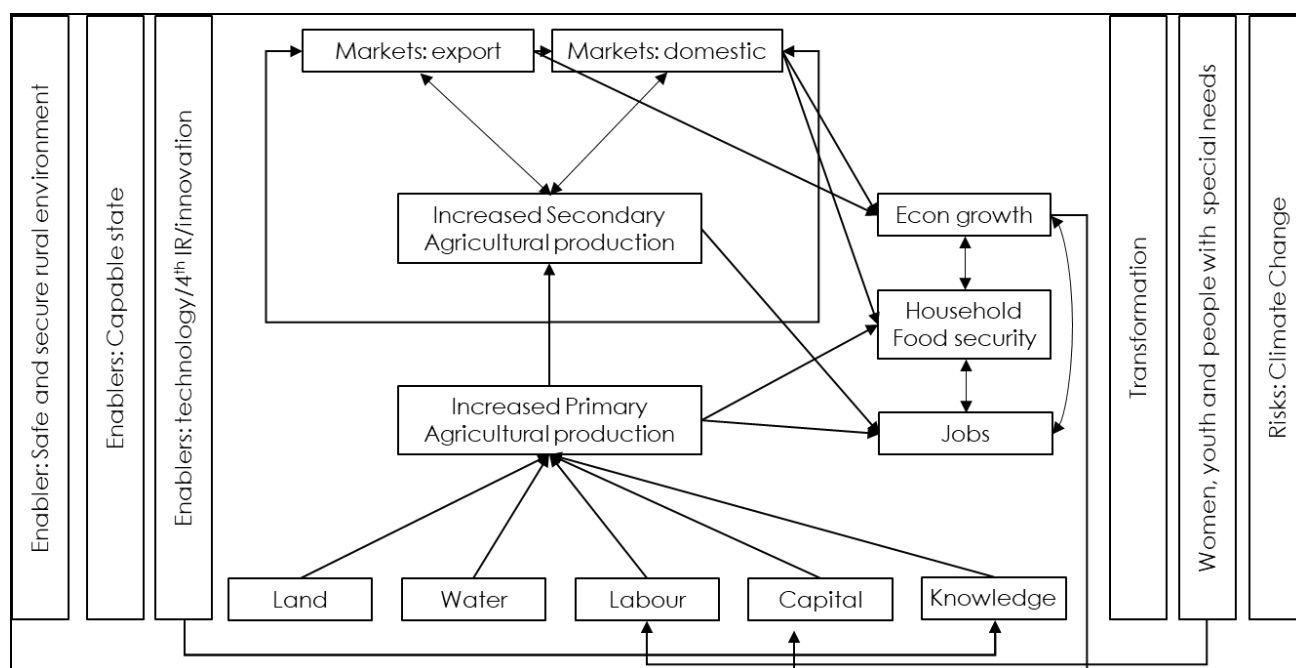


Figure 32: High-level systems approach towards interventions of the WCDoA

The number of jobs in both primary and secondary agricultural production is directly related to the nature of the production process (the production system followed); in other words, the way that the various inputs are combined during the production process. Similarly, economic returns from agricultural production come from domestic or international markets. Economic growth, in turn, adds to the pool of monetary capital necessary for agricultural production.

Households could either produce their food for own consumption via household or communal food gardens, or by consuming part of the output from smallholder or commercial production. However, the number of households with access to resources for 'own production' is declining and one of the consequences of urbanisation is that households are becoming divorced from their means of production. It follows that these households obtain their food from domestic markets.

In this instance, domestic markets can be either in the form of formal markets (e.g. supermarkets), informal markets, or social markets (e.g. food distribution schemes or food aid). Imported products (e.g. rice not produced in South Africa), also find their way to local households via domestic markets. To obtain products from the domestic market, households must have some form of currency (either monetary or social), products must be obtainable (e.g. within reasonable travelling distance), they must be culturally acceptable (e.g. Halal, vegetarian, etc.), and they must be safe (e.g. not contaminated).

As there is an inverse relationship between the share of food in the household expenditure on the one side and the Socio-Economic Measurement (SEM) of households on the other, households on the margin of food security are also the most vulnerable to changes in food prices. At the same time, it is also a well-known fact that the consumer price of food item drastically declines if a commodity moves from import parity to export parity.

It is important to note that a (positive) loop will develop between economic growth, household food security and jobs. With economic growth, additional jobs outside agriculture will develop and the additional income will improve household food security. This, in turn, will also have a positive impact on economic growth.

For an agricultural system to operate successfully, a number of enablers (some may call it sanitary factors) need to be in place. There must be: (a) a safe and secure rural environment; (b) a capable state creating a viable institutional environment; and (c) the systems must be in place to provide the

right technology, ensure innovation and ensure the on-boarding of 4th IR challenges and opportunities. The latter enabler adds to the skills base and intellectual capital underpinning the production process.

At the same time a number of externalities needs to be internalised if the agricultural system is to be sustainable over the long term. In the first instance, transformation needs to take place, not only in terms of resources, but also throughout the value chain from primary production to markets. The same applies for the system to be able to absorb women, youth and people with special needs. Finally, the system needs to adapt itself to climate change and associated risks.

In short, it is argued that increased demand for primary and secondary agricultural products (from households, domestic and international markets) will lead to increased production. This, in turn will stimulate economic growth, improve food security and create jobs. For agricultural production to increase, resources of the right quality and integrity must be available at the appropriate cost to the system. For the whole system to operate, a number of enablers must be in place, and to ensure its social and natural sustainability, a number of externalities must be internalised.

Part C: Measuring Our Performance

9. Institutional Performance Information

Strategic direction: A transformed and sustainable Agricultural Sector ensuring food security and economic prosperity for all.

9.1. Measuring the Impact

Impact statement	Improved livelihood for all
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9.2. Measuring Outcomes

MTSF priority	Economic Transformation and Job Creation		
Outcome	Outcome Indicator	Baseline	Five year target
Increased agricultural production in a sustainable manner.	O.1: The Provincial Agricultural Sector increase its export by at least 10% over the next 5 years.	R101 billion in 2023	R112,19 billion in 2030
	O.2: Enhanced agri-processing capacity at both primary and secondary level.	GVA R43 billion in 2023	R63,95 billion by 2030
Improved food security and safety.	O.3: Increased Gross Value Added (GVA) through sustainable agricultural production in the Western Cape	R25 billion in 2023	GVA 33,40 billion by 2030
Transformed and inclusive Agricultural Sector.	O.4: Success of supported land reform projects	82,6% success rate in 2023 (measured via external evaluation at the hand of 39 criteria.)	As the metric of the 2028 evaluation will not be comparable, a new target will be designed.
Innovative and resilient rural economies.	O.5: Development of an enabling environment to increase agricultural and related jobs	338 996 (2023)	406 158 (2030)

Note: The baselines of Outcome Indicators O.1 – O.3 and O.5 are based on the most recently available Quantec data and the same will apply in 2030. The baseline for Outcome Indicator O.4 is based on an external evaluation completed in 2023.

9.3. Explanation of Planned Performance over the Five-Year Planning Period

9.3.1. Contribution of outcomes to the strategic framework.

Based on Outcomes described above, the causality model developed in Figure 32 above can be used to develop the sub-outcomes to be achieved over the next five years (see Table 61). In order to achieve the 1st Outcome (Increased agricultural production in a sustainable manner), the export position of the provincial agriculture sector must be improved, value must be added in agri-processing, primary agricultural production must increase, and the sustainable use of water and land resources must be ensured.

Table 61: The sub-outcomes for each outcome

OUTCOME	SUB-OUTCOME
1. Increased agricultural production in a sustainable	1.1. Improve the export position of the provincial agricultural sector
	1.2. Enhance the agri-processing value-add in the province
	1.3. Increase sustainable agricultural production (primary provincial commodities)

OUTCOME	SUB-OUTCOME
manner	1.4. Optimise the sustainable utilisation of water and land resources
	1.5. Enhance the Climate Change resilience of the Sector
2. Improved food security and safety	2.1. Increase access to community/household produced food
	2.2. Ensure affordability of food.
	2.3. Ensure that animal products are safe for consumption.
3. Transformed and inclusive Agricultural Sector	3.1. Improve the success of agricultural activity among black farmers
	3.2. Increase relevant skills within the agricultural sector
	3.3. Improve the participation of youth, women and people with disabilities in the agricultural economy
4. Innovative and resilient rural economies	4.1. Increase access to agricultural and related economic opportunities for rural communities
	4.2. Develop an enabling environment for job creation in the agricultural sector
	4.3. Improve safety and security in rural areas

The first 'sub-outcome' of the 'second outcome' (Improved food security and safety), must link closely with primary production, by increasing access to community/household produced food (own production for own consumption in household or community gardens). Those who cannot produce their own food need to purchase it and for this reason the containment of food price inflation by increased production, is the second outcome. The third sub outcome addresses the food safety matters.

In order to realise the 3rd Outcome (Transformed and inclusive Agricultural Sector), the success rate of production amongst black farmers must receive increased support through initiatives such as skills development and training programmes, which would allow for the growth of both primary and secondary agricultural production. The third sub-outcome addresses the need to improve the participation of youth, women and people with disabilities in the agricultural economy.

For the 4th and last Outcome (Innovative and resilient rural economies), it is necessary to increase access to economic opportunities for rural communities. At the same time an enabling environment for job creation in the agricultural sector needs to be created whilst safety and security needs to be improved to ensure resilient rural communities. The link between the sub-outcomes and the high-level TOC is presented in Figure 33.

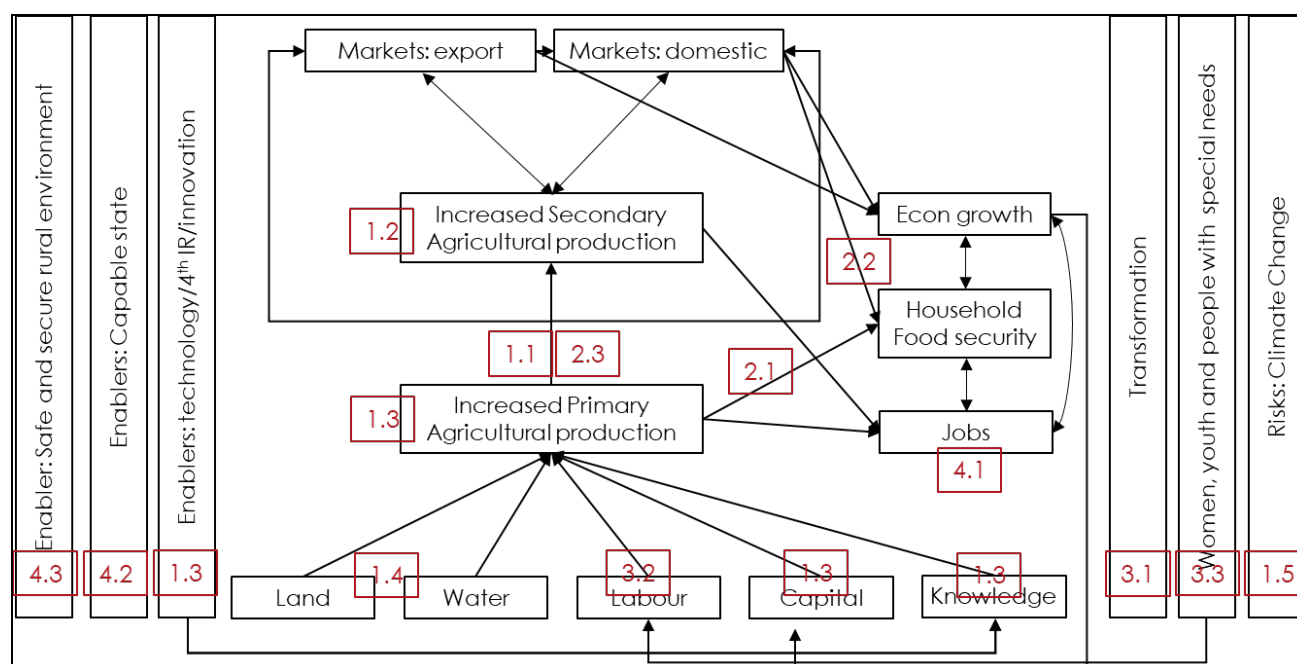


Figure 33: Link between the outcomes and the high-level causality model of the Department

9.3.2. Developing implementation plans

During the preparation of the current SP the evaluations completed since 2019 were scrutinised and a list of implicit theories of change (TOC) were identified (not all evaluations included a TOC). This list is provided in Table 62.

Table 62: Distinct Theories of Change developed over the period 2019 to 2024.

Market access
Private sector investment
Resource availability
Food security
Transformation, Smallholder support
Agricultural education and training / Agricultural skills
Rural Safety and security
Land care
SmartAgri plan
Meat safety
Partnerships in Agri Land Solutions (PALS)s
Greater Keurbooms Area Conceptual TOC
Sustainable Resource Management (SRM)
Project Khulisa Agri processing
Market development initiatives
Youth development initiatives

Source: PDG/Blue North (2024): Theory of Change Stocktake.

In the 2020/21 to 2024/25 Strategic Plan quite similar outcomes and sub-outcomes to the current SP (Table 61) were developed and for each of the sub-outcomes a clear planning mechanism was proposed. During the preparation work for the current SP a stocktake of the TOCs were developed (see Table 62) and these TOCs were linked to the planning mechanism proposed in 2019. (The results of this process are provided in Table 63).

Table 63: Distinct Theories of Change developed over the period 2019 to 2024.

SUB-OUTCOME	PLANNING MECHANISM PROPOSED IN 2020/21 – 2024/25 SP	LINK TO TOC STOCKTAKE
1.1 The provincial agricultural sector at least maintains its export position	Develop market access TOC	New TOC for market access completed and 2024 evaluation of market development initiatives
1.2 Enhanced Agri-processing value-add in the province	Finalise the 'Khulisa: Agri-processing Management Improvement Plan'	Finalised and implemented
1.3 Increased sustainable agricultural production (primary provincial commodities)	Develop TOC for private sector investment	New TOC for private sector investment completed
1.4 Optimised sustainable utilisation of water and land resources	Develop TOC for resource availability (water and land); Results from LandCare, SRM and Smart Agri evaluations	New TOC for resource availability completed as well as Land Care and SRUM evaluation completed.
1.5 Enhanced climate change resilience of the Sector	To be determined based on the results from the SmartAgri evaluation	Smart Agri Plan completed and implemented
2.1 Increased access to	Develop food security TOC	New TOC for food security

SUB-OUTCOME	PLANNING MECHANISM PROPOSED IN 2020/21 – 2024/25 SP	LINK TO TOC STOCKTAKE
community/household produced food		completed
2.2 Affordability of food is assured (Minimised food inflation or reduced inflationary costs as indicators)	Increase sustainable agricultural production (sub-outcome)	Evaluation of Greater Keurbooms Area completed.
2.3 Animal products are safe for consumption	Use results from the meat safety evaluation	Evaluation completed and MIP implemented
3.1 Improved success of agricultural activity among black farmers	Develop TOC for Support to land reform beneficiaries/50 smallholder to commercial farmers)	Land reform evaluations completed in 2013, 2018 and 2023 and MIPs implemented and PALS evaluation conducted
3.2 Increased relevant skills within the agricultural sector	Develop agricultural training TOC	New evaluation on agricultural education and training / skills development completed
3.3 Improved participation of youth, women and people with disabilities in the agricultural economy	Develop aggregated data and plans for youth, women and people with disabilities.	Evaluation of youth development initiatives completed
4.1 Increased access to agricultural and related economic opportunities for rural communities	Use results from rural development evaluation	MIP of evaluation completed and implemented
4.2 An enabling environment for job creation in the agricultural sector is created	Use results from evaluation of government services to agri-workers	MIP of evaluation completed and implemented
4.3 Improve safety and security in rural areas	Develop TOC for safety and security in rural areas	New evaluation for rural safety completed and strategy done

During the Department's strategic Session, the participants were asked to validate the relevance of the TOC identified during the stocktake and to propose new evaluations/TOCs to be developed. From this process it was recommended that the following should be done whilst the remainder of TOCs / interventions do not need any change under the 2025 – 2030 SP:

- Revisit the meat safety TOC.
- Revisit the Sustainable Resource Use and Management TOC.
- Combine the market access TOC with the results from the later evaluation of the Market development initiatives into a singular TOC.

Furthermore, it was also noted that the Minister's priorities of market access, food security and nutrition as well as agricultural support are complex and would need detailed analysis and further unpacking of the interventions as soon as possible. Particularly 'agricultural support' encompasses a complex system and will warrant the development of a more complex systems analysis. For this reason it was decided to, in preparation of the SP, focus on:

- Revisiting the meat safety TOC.
- Developing a singular TOC for market access and market development initiatives.
- Developing a systems map for agricultural support.

It was already mentioned that during the same process the participants in the Department's Strategic Session were requested to identify any new evaluations / TOCs which needs to be completed. During this meeting the following were identified

- a) Diagnostic and design evaluation of use of AI in research and training
- b) Capable state
- c) Food security systems map and nutrition
- d) Agri-tourism
- e) Climate change
- f) Rural economic development
- g) Biosecurity
- h) Water security (ecological infrastructure)
- i) Agri-processing support.

During subsequent management meetings it was decided to prioritise ecological infrastructure and this evaluation is already on-going. At the same time a decision was made that the topic of a capable state is best analysed via a process exploring successful partnerships between the WCDoA and other spheres/organs of state. It follows that this exercise will be addressed via an internal survey and that the results will be tabled at the 2025 Strategic Session of the Department. Finally, rural economic development is best addressed at a district level. It follows that the following new evaluations will be conducted during the 2025/26 financial year and that the other requests may be included in the Department's Evaluation Plan for other years:

- a) Diagnostic and impact and design evaluation of artificial intelligence on the Western Cape Agricultural Sector and the WCDoA.
- b) Development of an Agricultural Strategy for the Garden Route District.
- c) Diagnostic, implementation and design evaluation of climate change.

9.3.3. Systems map for agricultural support

In section 9.3.2, agricultural support was flagged up as one of the key priorities postulating a detailed analysis and further unpacking of the interventions to achieve the desired outcome in the medium to long term period. For this reason, it is important as part of defining this Strategic Plan to consider:

- What factors influence the success of agricultural producers? How does this differ for different types of producers with different commodities and at different scales?
- WCDoA cannot and should not do everything. Given its mandate and resources, what should the department deliver directly, and what should it influence in other ways?
- What are the implications for continuation of WCDoA's current programming and approach, revision, and new initiatives?

In responding to these pertinent questions, WCDoA deployed system mapping and theory of change tools to consolidate their knowledge and arrive at a deep, shared understanding of the strategy and the assumptions behind. The **Figure 34 (a) and (b)** below presents the systems map (key and influencing factors for agricultural support and **Figure 35**, the level of WCDoA's involvement in the agricultural system.

The success of Agricultural producers (yellow circle) is affected by the interconnection of 15 **key factors** (blue circles) and 58 **influencing factors** (grey circles).

Direction of arrows indicates the causal relationship between factors.

Larger arrows depict stronger connections between key factors and influencing factors.

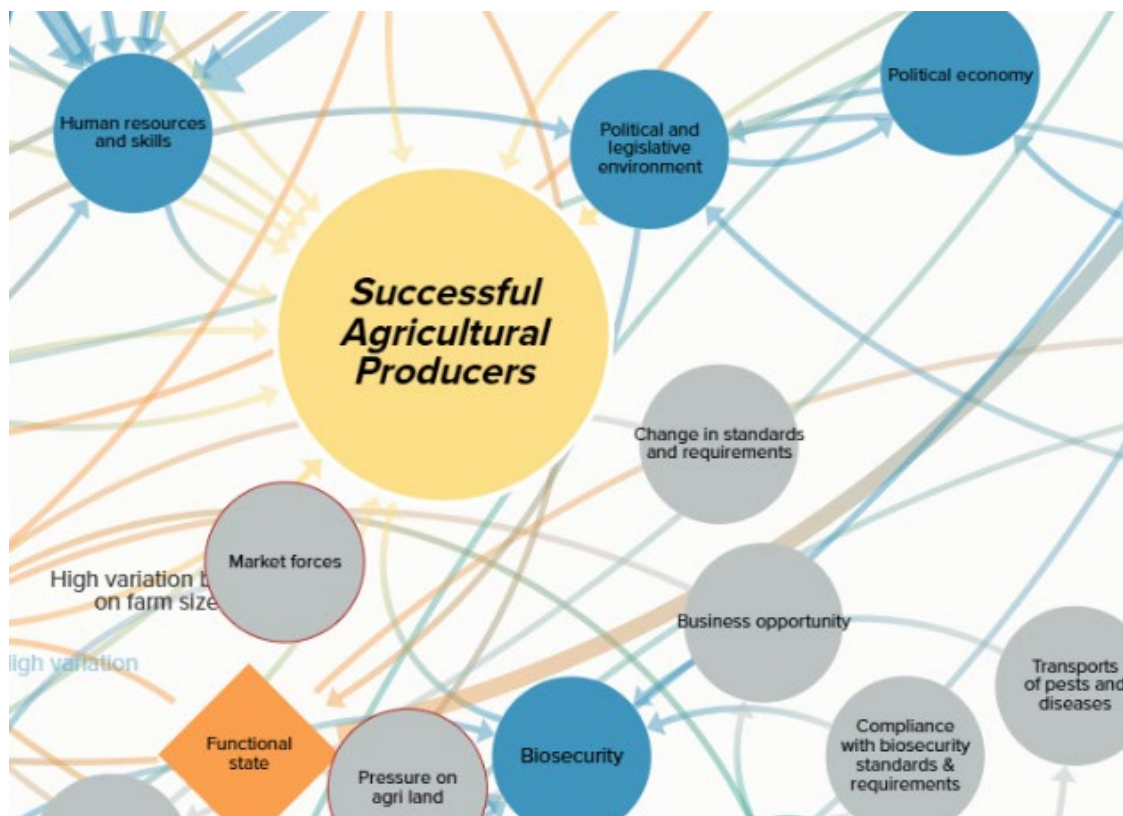


Figure 34 (a): The Systems map for agricultural support
 Source: PDG/Blue North (2024); Theory of Change Stocktake

The Key factors are:

1. Access to land
- 2. Water access**
- 3. Access to markets**
- 4. Access to production inputs**
5. Economic stability (political economy)
6. Political/legislative environment (political economy)
7. Business management and entrepreneurial skills
8. Financial governance, compliance and skills
9. Human resources and labour skills
10. Health and safety (on and off farm)
- 11. Climate change resilience**
12. Energy security and sources
- 13. Biosecurity**
14. Infrastructure
15. Technology

High interconnection

Water access (B), access to markets (C), production inputs (D), and biosecurity (M), and climate change resilience (K) are among the most important key factors for the WCDOA to consider as they are aligned with current strategy and areas of high interconnection. Focusing on these factors will have a multiplier effect without deviating from strategy.

Influencing factors

All key factors are influenced by at least one other influencing factor. In some instances, influencing factors (orange diamonds) directly influence more than one key factor. For example, the existence of a functional state influences several key factors including market and water access.

Several influencing factors have especially strong influence on the key factors – shown with a thicker arrow. This includes education and training (this has an especially strong influence on the quality of business management and entrepreneurial skills applied at farm level), market availability (access to markets), biocontrol measures and quarantine facilities (Biosecurity), access to financial resources (multiple), government support (production inputs), disaster risk reduction (Climate change resilience).

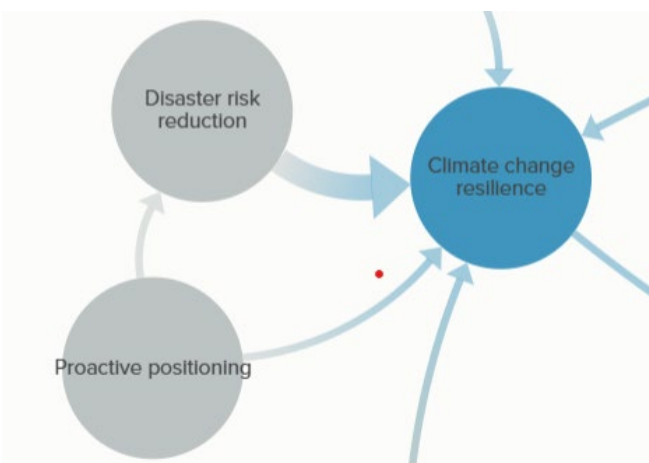


Figure 34 (b): The Systems map for agricultural support

Source: PDG/Blue North (2024): Theory of Change Stocktake

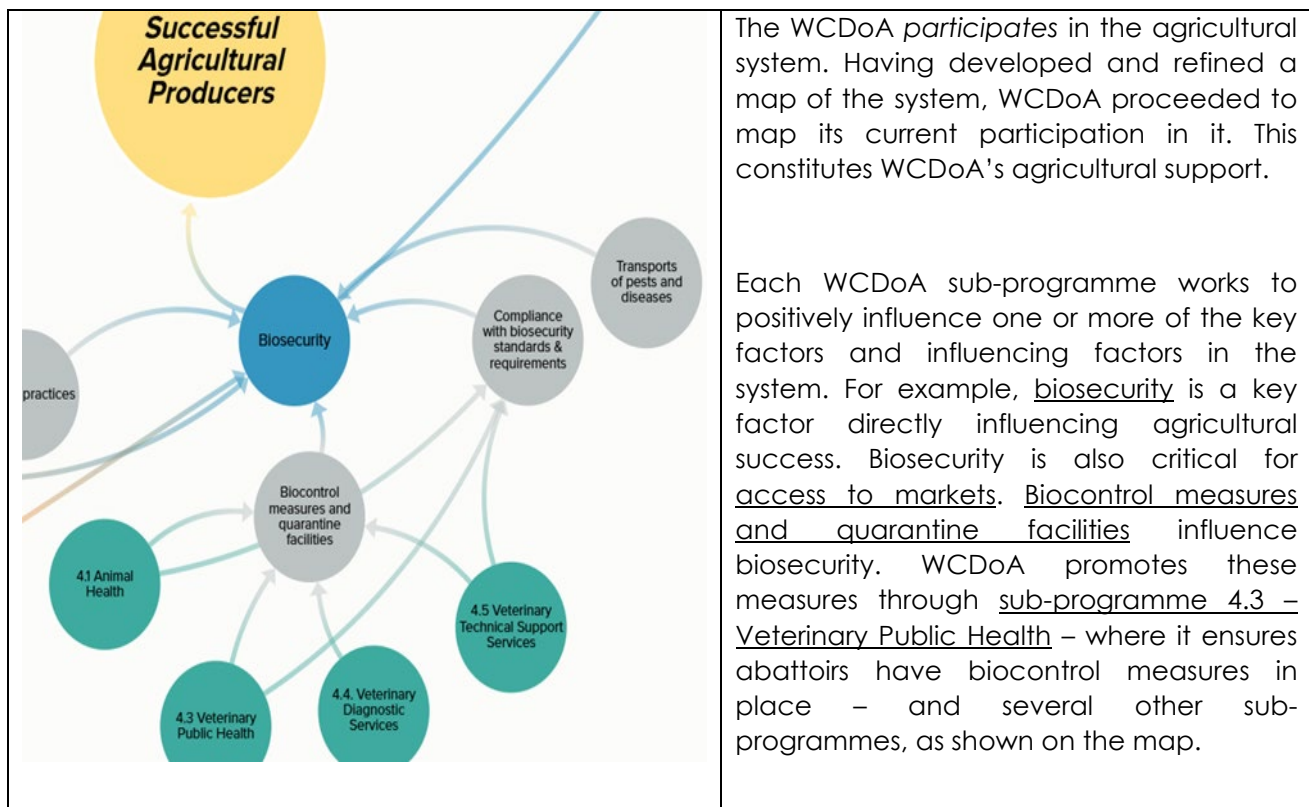


Figure 35: Agricultural support: WCDDoA's involvement in the agricultural system

Source: PDG/Blue North (2024): Theory of Change Stocktake

9.3.4. Singular TOC for market access and market development initiative

9.3.4.1. Supporting export and creating an enabling environment

WCDDoA promotes the market access of Western Cape agricultural products, both in export markets and the domestic markets. The following theory of change (depicted in two diagrams **Figure 36** and **Figure 37** for ease of reading) demonstrates WCDDoA's contributions to market access, and ultimately, to increasing exports, economic growth, employment, and increased economic participation of designated groups. They have been consulted on and refined with intergovernmental partners.

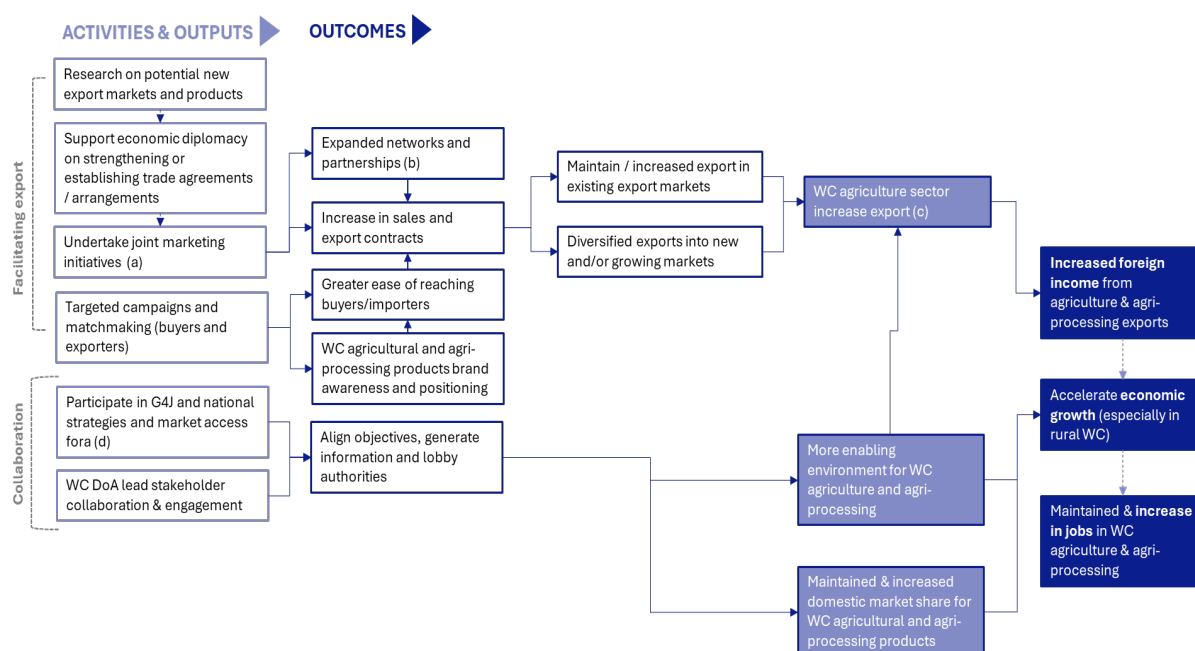


Figure 36: Supporting export and creating an enabling environment

Assumptions & Footnotes:

- In collaboration with Wesgro, industry bodies, and WC producers; includes events, international exhibitions and trade shows, and joint programmes to increase awareness of WC products in key markets (mainly international, but also local – examples: Made in the Cape; USAID Africa desk; WOSA Africa & China initiative; SATI China & Asia campaigns)
- With stakeholders, e.g. regulators in target countries, and among producers, exporters, importers
- By at least 5% over the next 5 years
- Includes provincial export forums, port liaison, Agricultural Trade Forum (ATF), and aligns with the WC Export Strategy Outcome 6.

9.3.4.2. Leveraging evidence and capacity strengthening

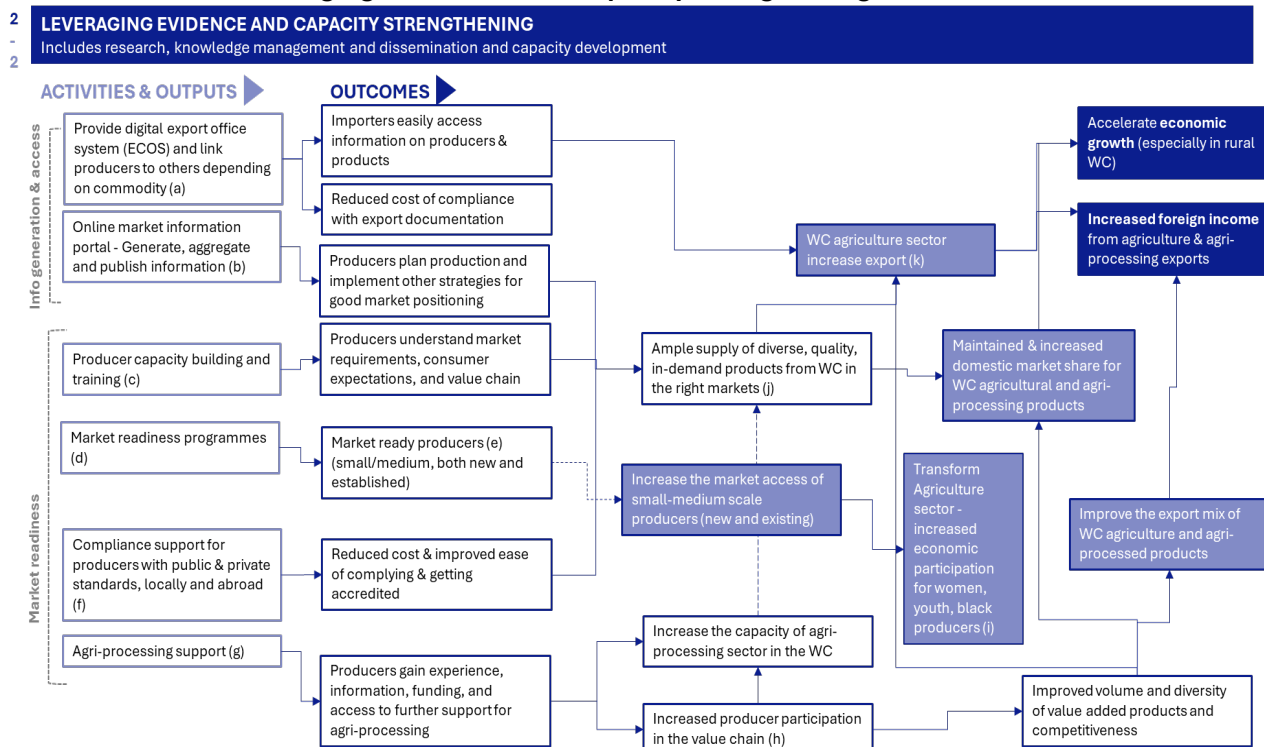


Figure 37: Leveraging evidence and capacity strengthening

Assumptions & Footnotes

- a) WCDa owns and manages the ECOS system, which focuses only on animal products, and refers other commodity producers to other systems such as the Cape Trade Portal and Wineonline, Phyclean and others. Note that in addition to hosting ECOS and referring to other systems, the department also participates with other stakeholders in initiatives to improve legislative export compliance (towards a single window service) – as one of the activities under Collaboration.
- b) This includes generating some information (livestock, vegetables) and linking to other sources for other commodities (e.g. grain, fruit).
- c) WCDa takes a commodity approach in capacity building with various partners including industry bodies, on a wide range of “market readiness” issues, responding to producer needs. The importance of this work was affirmed by the 2024 evaluation which found that Wesgro’s market readiness programme is a general one; leaving a need for a programme that is more specific to the Agricultural sector. The 2019 market access problem tree discussed the need for special support for agricultural producers to export. Includes: Product record keeping; Trips to (potential) import markets; Training for compliance with e.g. SA GAP – first aid; safe use of chemicals; Tailor-made, comprehensive agri export capacity building programme (forthcoming); Programmes for emerging & small scale producers for export readiness (in collaboration with DTIC) (forthcoming) .
- d) WCDa takes a commodity approach in supporting market readiness, E.g. to comply with SIZA, WIETA, SA GAP and Global GAP.
- e) “Market ready producers” is defined as follows: “Market Readiness is the state of a company/business being fully prepared to enter a specific market, having met all necessary

conditions and requirements. In other words it's a term used to signify that a business has the character, capacity and courage to enter markets. The business has gone through a process of learning and is willing and able to take the information, resources and assistance that are provided and use them in a positive and productive manner to access markets, especially at a domestic level and later international markets." (Notice that market readiness is defined with reference to a specific market.)

- f) Compliance support for a variety of standards, residue testing, or subsidise the cost of private chemical testing. This support is for producers of all sizes. This includes evidence of compliance for meat for export. See detailed Meat Safety TOC.
- g) Within the WCG, WCDoA has been assigned the personnel and responsibility for "driving and coordinating the agri-processing initiatives of the WCG". See 2015 cabinet submission on Project Khulisa, section 4. Agri-processing support is aimed at facilitating initiatives to ensure participation within the value chain (see definition on APP). This is done through product development, product improvement, product testing, compliance/ regulatory and legislative framework and technical support i.t.o processing, production, infrastructure (which is dependent on the request from client/farmer), dissemination of information and assist with access to various processing equipment, access to new technology and contribution to the safety and quality of processing food products. Currently it focusses on meat processing technology and Fruits and Vegetable processing technology. Depending on the needs of the producer and WCDoA's offering, WCDoA may assist them in accessing support from others.
- h) Agri-processing support is both for existing producers (primary and other) and for new entrants. Depending on their starting point, the "increased producer participation in the value chain" means that they enter the value chain, or diversify, or improve their capacity for production (volume).
- i) By the Market Readiness programme targeting small/medium and new farmers, a larger portion of women, youth and black farmers benefit.
- j) General assumption on slide 2 – public availability of support means easier access for small / new producers. Larger / established entities may also have accessed it, with own funds. Lower the barrier to entry.
- k) Note the alignment between the WCDoA's support to producers in terms of export certification, production planning, capacity building, compliance and market access, and the WCG Export Strategy's intended outcome of "enhanced competitiveness, sustainability and capabilities of exporters".

9.3.5. Meat safety TOC

9.3.5.1. Introduction and background

This theory of change is one of a series commissioned by the Western Cape Department of Agriculture (WCDoA). It has been developed to inform the WCDoA's Strategic Plan for the period 2024/25 to 2029/2030. The emphasis of this theory of change is on the ability of the Western Cape Department of Agriculture to regulate the safety of meat and meat products in the province and to deliver on their mandate under the Meat Safety Act (Act No. 40 of 2000) and the Constitution of South Africa ensuring that the consumers of the Western Cape (and local or international trading partners) has access to safe meat (food). This topic was identified as a strategic area of WCDoA's work that requires elaboration in an updated theory of change.

This theory of change was developed over the period September to November 2024. A first comprehensive draft was developed internally by the Veterinary Public Health (VPH) sub-

programme; and this was then refined by PDG and Blue North through facilitated discussion with VPH and other WCDoA staff, document review, and follow-up correspondence. Refer to the Strategic Plan annexures for more information about the broader strategy development process of which this forms part.

South Africa has a high per capita consumption rate of meat, with the Western Cape playing a significant role in local, national and international production and trade. The province boasts a diverse livestock population and a robust meat production system, with abattoirs being a crucial component. Consumers have the right to safe food, and the Department of Agriculture is mandated to regulate and ensure safe meat production throughout the Western Cape.

Importance of Regulating Meat Safety and meat Production:

- Safeguards consumer health by reducing the risk and the occurrence of foodborne related illnesses.
- Supports a sustainable meat supply chain within the province.
- Facilitates trade within South Africa and internationally.

Challenges:

- Ensuring adequate resources and capacity for veterinary services with specific reference to VPH.
- Maintaining compliance with regulations across the entire meat production chain.
- Addressing urban farming, informal slaughter and cultural practices that may pose challenges to a sustainable and safe meat supply chain.
- Adapting to a changing environment, including globalization, climate change, and evolving consumer preferences.

9.3.5.2. The Meat Safety theory of change

The Meat Safety theory of change is presented in Figure 38 below:

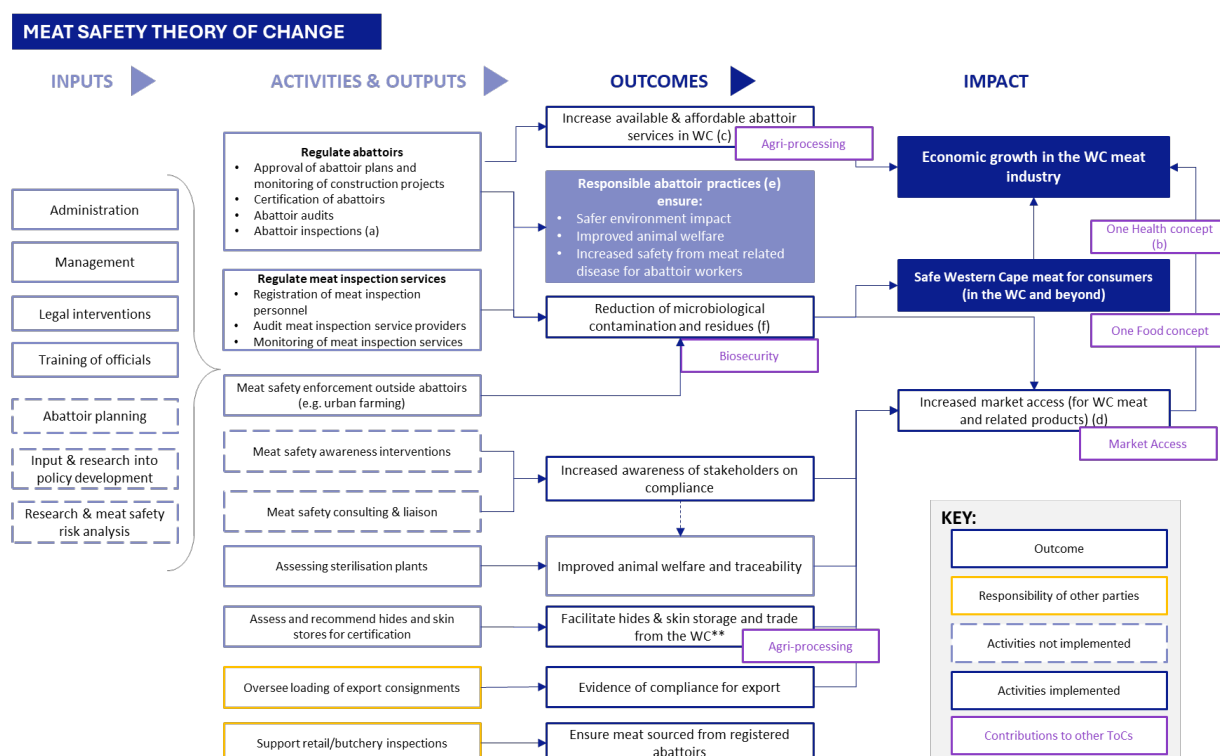


Figure 38: The Meat Safety Theory Of Change

9.3.5.3. Narrative description

Vision: A Western Cape where the production of safe meat is the norm, reducing the risks of foodborne illnesses, and promoting public health by fostering a thriving meat industry.

Goal: To enhance safe and sustainable meat production throughout the Western Cape.

Key areas

To achieve this goal, we will focus on the following key areas³⁹.

a) Strong Regulatory Framework and Legal Interventions:

- **Registration and Certification of Abattoirs:** Register and certify abattoirs to ensure that facilities meet specific structural and hygiene standards.
- **Abattoir Audits and Inspections:** Conduct regular audits and inspections to ensure compliance with regulations and food safety systems or standards.
- **Policy Development⁴⁰:** Develop and implement policies that promote an effective and efficient veterinary public health system enhancing safe meat production and consumption. Include aspects related to urban agriculture.

³⁹This is a combination of the Inputs, Activities and Outputs on the TOC diagram that follows.

- **Regulate Meat Inspection:** Ensure that meat inspection personnel are qualified and adhere to strict standards. Ensure an adequate number of inspectors are allocated to abattoirs to enhance the quality of meat inspection services within the province.
- **Hides and Skin Stores:** Promote the certification of hide and skin stores to improve traceability and facilitate trade.
- **Sterilization Plants:** Ensure that sterilization plants meet the appropriate standards and provide the recommendations for registration.
- **Supervision and Loading of Export Consignments:** Oversee the loading of export consignments to maintain and certify compliance with standards, enabling local and international trade. Allow for flexible working hours to facilitate the loading of export consignments.
- **Effective Meat Safety Enforcement:** Ensure effective administration and management of meat safety service in line with WCDoA's mandate. Increase capacity within VPH to conduct abattoir inspections, compliance monitoring, and law enforcement actions and to provide training to government officials on meat safety regulations and law enforcement.
- **Risk-Based Approach:** Implement a risk-based approach to resource allocation, focusing on areas posing the highest safety concerns.

b) **Empowered Stakeholders:**

- **Meat Safety Awareness Interventions⁴⁰:** Raise awareness among consumers, producers, and retailers about safe meat, including handling, transportation and storage practices.
- **Meat Safety Consulting and Liaison⁴²:** Provide technical assistance and support to industry stakeholders.
- **Industry Training:** Provide training programs for farmers, meat handlers, abattoir operators, and retailers on safe food handling practices and regulatory requirements. Specifically include education and training to urban farmers on animal husbandry, disease prevention and how it relates to food safety.
- **Collaboration and Partnerships:** Foster collaboration between government agencies, industry stakeholders, and research institutions to share best practices and address emerging challenges faced by the abattoir and broader meat industry.
- **Traceability Systems:** Implement robust traceability systems to track meat products throughout the value chain (i.e., abattoirs, retail and butchery inspection to verify compliance with regulations and standards and ensure that meat is derived from reputable sources)
- **Investment in Technology:** Encourage the adoption of innovative technologies for meat processing, waste management, and disease detection.

c) **Improved Infrastructural Planning and Development:**

- **Provincial spatial planning and development:** the Department should play an integral part, together with other public and private stakeholders, in the planning of future abattoirs,

⁴⁰Note that the resources are not currently available for this, as indicated by the dotted border around this activity on the TOC diagram. This represents a missed opportunity and risk as it means that policies are not optimally responsive to realities in the province.

⁴¹Note that the resources are not currently available for this. This constitutes a gap in WCDoA's ability to achieve the outcome of increased stakeholder awareness and compliance, especially for aspects of meat safety that are not subject to enforcement through the other activities.

⁴²Note that the resources are not currently available for this. This constitutes a gap in WCDoA's ability to achieve the outcome of increased stakeholder awareness and compliance.

focussing on adequate and accurate feasibility studies that will assist in creating a sustainable environment for existing and future abattoirs.

- **Abattoir planning and construction:** enforce regulations relating to the evaluation and approval of abattoir plans, monitoring of construction projects, and the certification of newly constructed facilities.
- **Modernization⁴³ of abattoirs:** Support the planning, construction, and upgrading of abattoirs in the province to meet modern hygiene and sanitation standards. Supporting the development of abattoirs and processing facilities that meet hygiene and safety standards.

d) **Capacitation of veterinary services with monetary resources:**

The critical capacitation of veterinary public health services with monetary resources will enable them to assist and promote market access enabling farmers and agri-producers to globally trade their goods. It has been demonstrated over time the multiplier effect of supporting veterinary public health services as previous interventions have resulted in industries / commodities who could not market their goods internationally were able to do so.

e) **Urban farming and meat consumption:**

Facilitate the development of infrastructure for the slaughtering of animal in the urban settings to protect the well-being of the animals, the environment and to ensure the safety of the meat and to protect the livelihoods of communities.

f) **Expected Outcomes**

By implementing these strategies, we anticipate the following outcomes:

- **Increased Availability and Affordability of Abattoir Services:** Improved access to suitable and affordable abattoir services that will lead to safe meat for consumers.
- **Responsible Abattoir Practices:** Enhanced animal welfare, safer working conditions, and reduced environmental impact.
- **Enhanced laboratory diagnostic capabilities to reduce the risk of Contamination and Residues:** Assist the province in monitoring and assessing the microbiological quality of meat and assessing the level of residues in meat and meat products and thereby minimizing the risk of contamination and residues in meat.
- **Increased Awareness of Stakeholders on Compliance:** Improved understanding and adherence to meat safety regulations.
- **Improved Animal Welfare, and Traceability:** Enhanced animal welfare and improved quality and traceability of meat products.
- **Evidence of Compliance for Export:** Facilitated market access for Western Cape meat producers, including abattoirs.
- **Safe Western Cape Meat for Consumers (in the WC and beyond):** Increased consumer confidence in the safety of meat derived from facilities in the Western Cape.
- **Sustainable WC Meat Industry:** Stimulated economic growth by supporting a thriving and sustainable meat industry, leading to increased market access for Western Cape meat products, leading to job creation and economic growth. Increased brand reputation and access for local producers.
- **Stronger Biosecurity:** Improved safeguards against emerging diseases and biosecurity threats at farm level, during transportation and at abattoirs. By working together, we can create a safer and more sustainable meat **meat production system in the Western Cape, benefiting consumers, producers, and the economy as a whole.**

⁴³Note that the resources are not currently available for this, necessitating a reactive rather than pro-active approach to the private abattoir industry.

Assumptions and footnotes

- a) **Comprehensive Abattoir Inspections:** This assumption implies that inspections will cover a wide range of areas (i.e., processes, meat inspection, documentation, structural compliance, and premises), including meat safety, animal welfare, inspection of hides and skins, waste disposal, and environmental impact. This comprehensive approach is crucial for ensuring the overall safety and sustainability of meat production.
- b) **One Health Approach:** This assumption recognizes the interconnectedness of human, animal, and environmental health. By adopting a One Health approach, the theory of change aims to address meat safety issues holistically, considering the potential impact on all three dimensions.
- c) **Enabling Regulatory Environment:** This assumption suggests that regulations will be designed to support the growth and development of the meat industry in the Western Cape. By minimizing compliance costs and streamlining processes, the regulatory framework can encourage investment and innovation in the sector. Importantly it is assumed that urban agriculture will be included in the regulatory reform.
- d) **Safeguarding Market Access:** This assumption highlights the importance of preventing meat safety incidents to maintain the Western Cape's reputation as a reliable supplier of safe and high-quality meat and meat products. Protecting market access is essential for the economic viability of the meat industry and the livelihoods of those involved.
- e) **Health and Safety:** Government's inspection and auditing work should be complemented by abattoirs and meat processing facilities prioritizing health and safety. This is essential for protecting workers and preventing accidents. By considering and implementing robust health and safety measures, the industry can create a safer working environment and reduce the risk of occupational injuries.
- f) **Meat Grading and quality:** In the industry, a well-established meat grading system can help to ensure the quality and consistency of meat and meat products. By providing clear standards and guidelines, meat grading can contribute to consumer confidence and market differentiation.

9.3.5.4. Threats

- **Limited Resources:** Insufficient financial and human resources can hinder the effective implementation of meat safety programs. This can lead to delays in inspections, inadequate training, and a weakened regulatory framework. Many abattoirs are reaching the end of their lifespan and are in need of substantial maintenance and renewal.
- **Client Pressure and Intimidation:** Pressure from industry stakeholders, such as abattoir owners and meat producers, can compromise the objectivity and independence of meat inspection personnel. Intimidation tactics may discourage VPH officials from enforcing regulations and taking necessary actions.
- **Legal Liability:** The Department may face legal action from consumers who may suffer foodborne illnesses or other harm due to unsafe meat or meat products. This could result in significant financial costs and reputational damage.
- **Zoonosis and Food Safety Breakdowns:** Outbreaks of zoonotic diseases or foodborne illnesses can have severe consequences for public health and the economy. These events can erode consumer confidence and lead to trade restrictions.
- **Lack of Career Progression:** A lack of career opportunities and salary progression within the sub-programme VPH can hinder recruitment, retention, and motivation. This can negatively impact on the overall effectiveness of the regulatory system.
- **Failed Independent Meat Inspection Scheme:** A poorly implemented or ineffective independent meat inspection scheme can undermine the credibility and reliability of meat safety certifications. This can lead to consumer confusion and distrust.

- **Professional Staff Shortages:** A shortage of qualified veterinarians and Environmental Health Practitioners (i.e., referred to as Veterinary Public Health Officers) can limit the capacity to conduct thorough inspections, provide technical advice, and respond to disease outbreaks.
- **Security Risks:** VPHO's may face security risks, particularly when dealing with non-compliant operators or conducting inspections in remote areas.
- **Hygiene Management System Compliance:** Ensuring compliance with hygiene management systems can be challenging, especially for smaller-scale operations.
- **Waste Management:** Effective waste management practices, including the disposal of animal by-products and wastewater, are crucial for environmental protection and public health.

10. Key Risks

In this section the key risks for the Western Cape Agricultural Sector will be developed from international level down to the Department. At international level the World Economic Forum's (WEF) Global Risk Report ⁴⁴ is a good resource and it is published in January each year; just in time for the Davos summit. The 2025 publication offers insights not only into the immediate most important risk factors around the globe but also into how the risk appetite of leading risk analysts is changing. With this year's theme of "*A world of growing divisions*" it is clear that the current geopolitical climate (Russia-Ukraine; Middle East and Sudan) makes it difficult not to think of the scaling of such events to present a material crisis in 2025. Indeed, 23% of all respondents contributing to the 2025 Global Risk Perception Survey (GRPS) consider state-based armed conflict as the number one current risk (see Figure 39).

⁴⁴WEF Risk Report (2025): The Global Risks Report 2025 (20th Edition). World Economic Forum, Geneva, Switzerland.

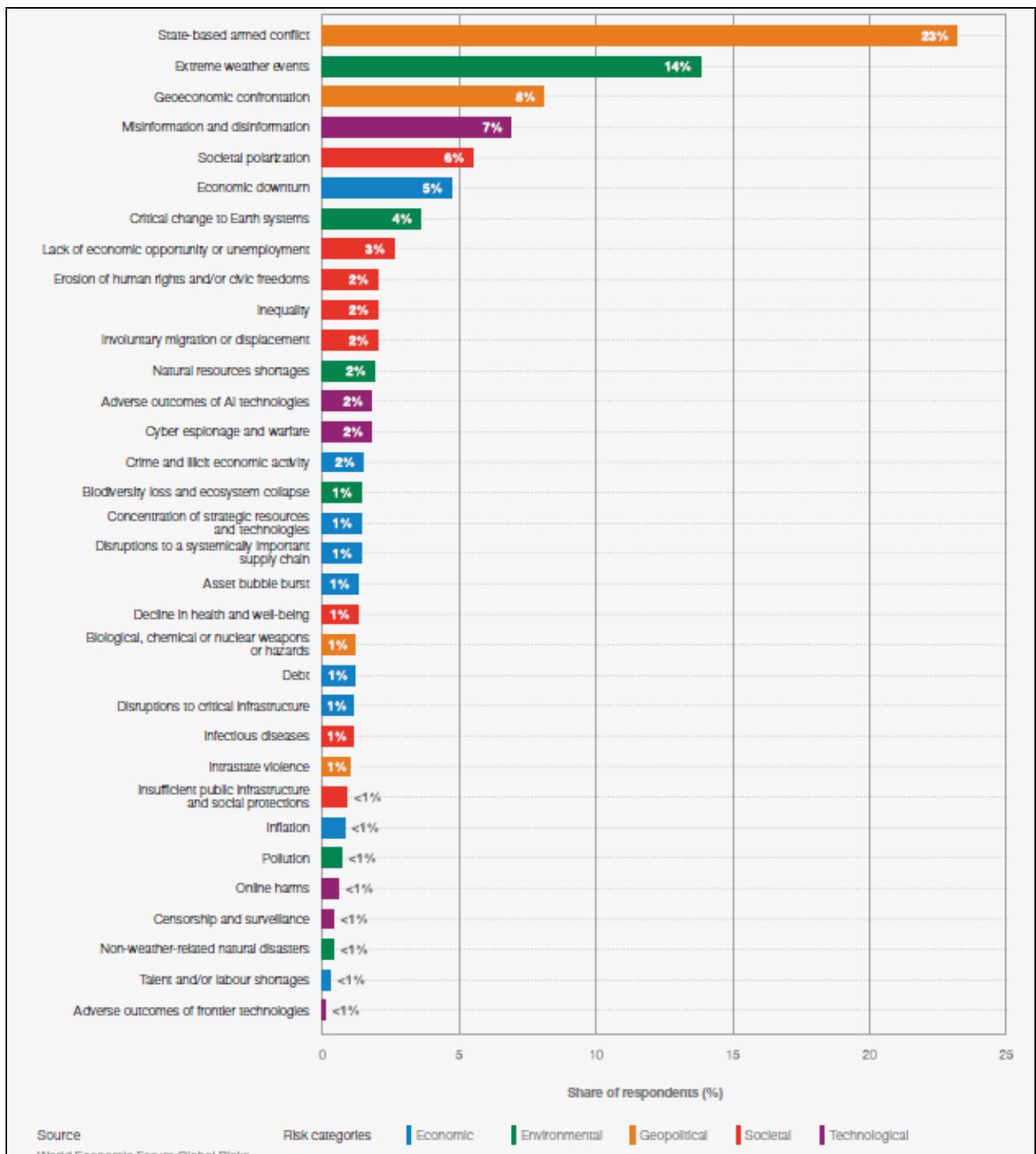


Figure 39: Share of respondents to the GRPS selecting a risk as the number 1 current risk

Source: WEF (2025)

Over the medium short term (2-years), it is considered that misinformation and disinformation will be the number one risk followed by extreme weather events (see Figure 42). Interesting to note, however, is that state-based armed conflict has moved from the number 5 to number 3 position since the 2023-24 GRPS. Over the long term the four most severe risks remain environmental risks (Figure 42).

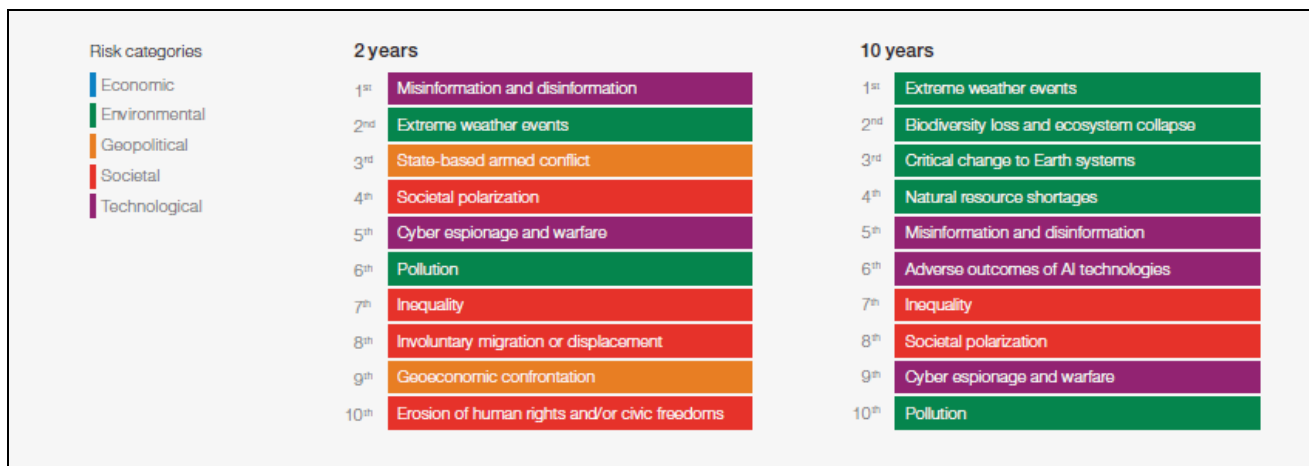


Figure 40: Global risks ranked by severity over the short and long term.

Source: WEF: (2025)

Over the two periods (2023-24 and 2024-25) misinformation and disinformation remains, Extreme weather events as well as involuntary migration or replacement remains the three most stable risks. At the same time, risks with the biggest increases are crime and illicit economic activity and the lack of economic opportunities or unemployment have shown the biggest increases, risks to which South Africa remains prone. Finally, it seems as if nobody is very much concerned about the risks of inflation and economic downturn (see Figure 43).

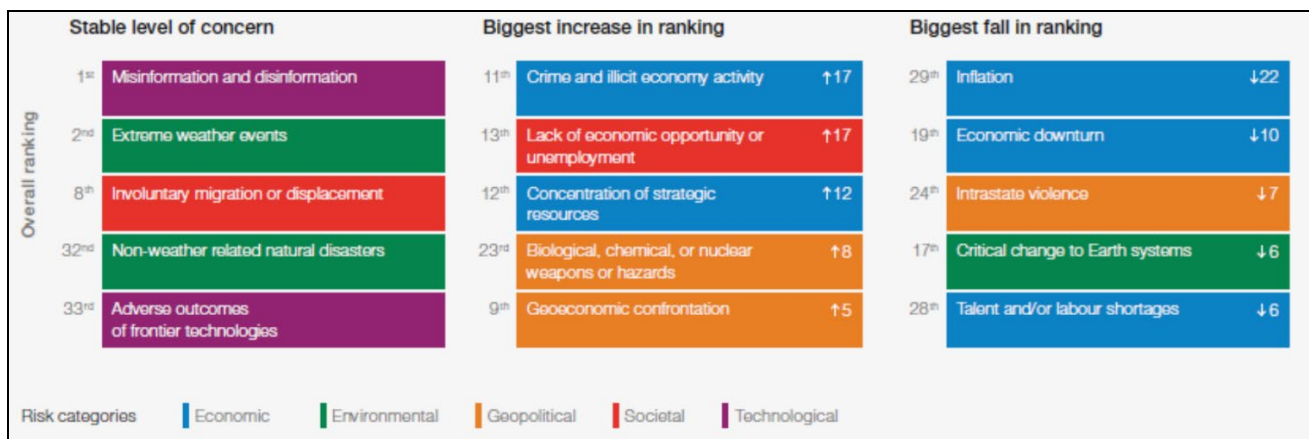


Figure 41: Global risks ranked by severity over the short and long term.

Source: WEF: (2025)

In BFAP (2025)⁴⁵ it is argued that the results of the WEF Risk report, whose release coincides with the annual WEF meeting in Davos, come with an important context. President Trump has just been sworn in as the next president of the United States of America (USA) after his decisive and remarkable political comeback. The contrast between the incoming versus the outgoing administration in Washington cannot be starker and much of the global risk environment hinges on the execution of policy as articulated by President Trump himself. The flurry of executive actions in his first week back in office point to an emboldened, abrasive and determined President trying to implement campaign promises with speed. To remain focussed on actions relevant to the South African agricultural sector we'll only discuss economic policy in this report. Several executive orders, as well as indications from his speeches since resuming office, offer some insights into the new policy direction. These include:

- The USA has decided to leave the World Health Organisation (WHO).
- Setting up a Ministry of Foreign Revenue (shows intent on tariff as an economic tool).

⁴⁵BFAP (2025): Quarterly assessment of external risks on the Western Cape Agricultural Sector. Bureau for Food and Agricultural Policy, Pretoria.

- c) The nominee for Secretary of Commerce mentioned a growth target of 3% (using tax cuts, tariffs, lower budget deficit & oil production as tools)
- d) Energy policy directly linked to further ease inflation
- e) Exit of the Green New Deal, Paris Climate Accord and the OECD Tax Deal
- f) Large investments announced (on AI infrastructure and programming capacity)
- g) 90-day halt in all foreign aid spending

Many observers have been questioning to what extent President Trump will execute his tariff policy and how this will affect developing countries such as South Africa. What is known at the time of writing is that Trump will use tariffs as a tool to accomplish campaign promises, but how exactly this will be done remains uncertain and there are mixed signals. For instance, Trump in his speech at Davos reiterated his resolve to place tariffs on Canada citing the trade balance deficit as one of the main reasons for an unfair trading relationship (and red tape). Yet, when asked about placing more tariffs on Chinese imports he was more reserved stating that he is still to decide. Likely, Washington's diplomacy with China is somewhat linked to Trump's aims of ending the Russia-Ukraine war. Oddly, Mr Trump has also said he aims to bring down oil prices which he speculates will force Russia into ending the war more quickly.

Public opinion on how Trump's era of using tariffs will affect South Africa and its Agricultural Sector is split. It is wise at this point to remember that the trading relationship between the USA and South Africa has been somewhat strained in recent years relating to the SA government's political actions. The 2016 review of the AGOA agreement and the concessions made on for instance poultry imports and the more recent strong opposition to SA being included in the Act from senators should be alarming. Also, it is not exactly clear if President Trump will act on placing tariffs on countries such as Canada and what implications that will have in terms of the US's participation in the World Trade Organisation (WTO). A point not yet covered in the media is what will happen if the USA decides to leave the WTO similar to the WHO in recent days. We'll dedicate more to this topic when focussing on one of the most important risks under review for this quarter.

Although the international risk environment is slightly riskier than in 2024, the local front has been affected by large political changes in 2024. The country entered the seventh administration in the democratic era with the establishment of the Government of National Unity (GNU). With no single party securing a majority vote in the National Assembly, the GNU, as guided by the Statement of Intent, provides the framework in which ten political parties pledged to cooperate, voluntarily, in the Executive and Legislative branches of government. This has led to a unique setting in which the President, Cyril Ramaphosa, has assembled a cabinet of ministers and deputy ministers from the different parties that are part of the GNU. These leaders of the executive branch of government are responsible for the execution and implementation of the basic programmes of priorities of the GNU, as well as developing and implementing national policy. That this coalition has remained intact and operational has been good for economic sentiments and was expected to lead to a step-change in growth prospects. Quite a few green shoots are emerging which points to a stronger economy, impacted by the cutting of interest rates supporting disposal household income and therefore leading to increased spending.

The BFAP team of analysts just completed the 6th iteration of the BFAP qualitative risk pulsing tool in the week of 20-24 January 2025, with 16 respondents sharing their views on the current risk environment for SA agriculture. The list of agricultural risks was slightly tailored to fit the emerging risks and to improve naming conventions to ensure greater consistency in the results. An agricultural risk is defined as follows:

"The possibility of an event or condition that, if it occurs, could cause a significant negative impact on the South African agricultural sector and associated value chains".

Conducting these external risk assessments per quarter allows us to analyse changes to the risk environment which Figure 43 illustrates. Extreme weather (droughts, hail, floods) was ranked first in January 2025 after climbing to second previously and before that ranked 3rd. Global political fragmentation is one of the new risks introduced and is ranked second, followed by exchange rate

volatility in third. The latter has been on the radar and in the top ten consistently over the past few quarters.

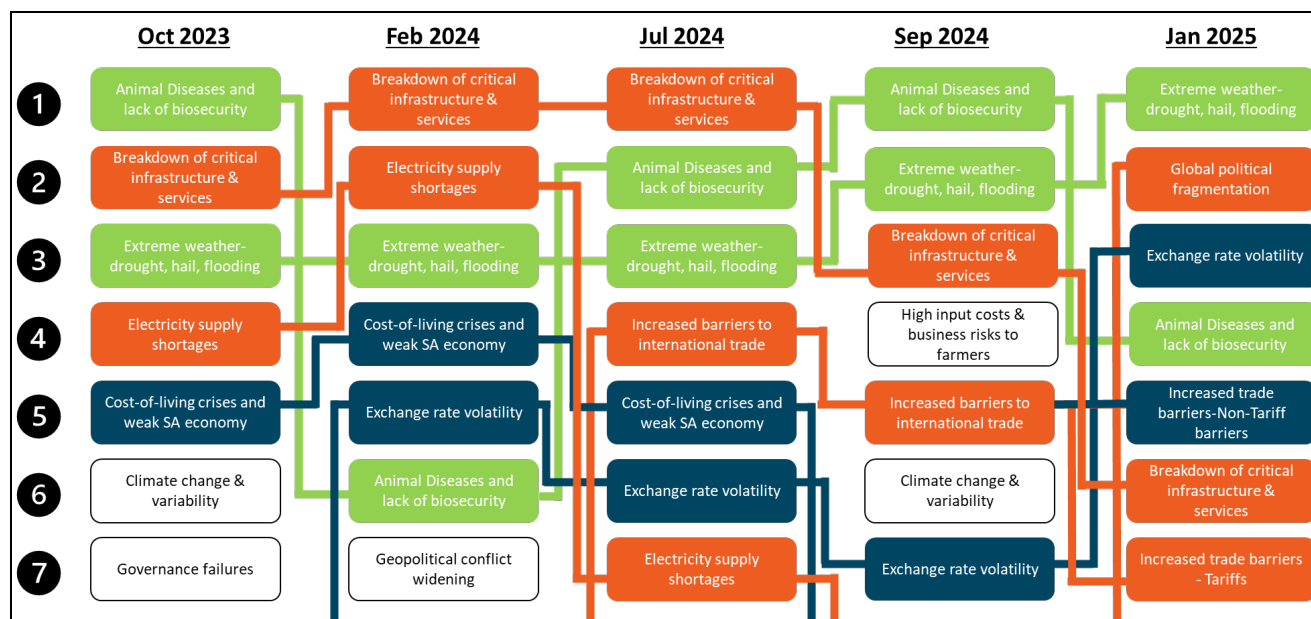


Figure 42: Top-ranked agricultural risks over time.

Source: BFAP: (2025)

Aside from the changes in the top-ranked risks, Figure 43 shows the entire ranking of all risks and the expected timing of impacts. Again, it is important to note that when interpreting these results, it is from the position that these risks significantly worsen from current levels and hence why they are referred to as risks even though some of them are already occurring to some extent.

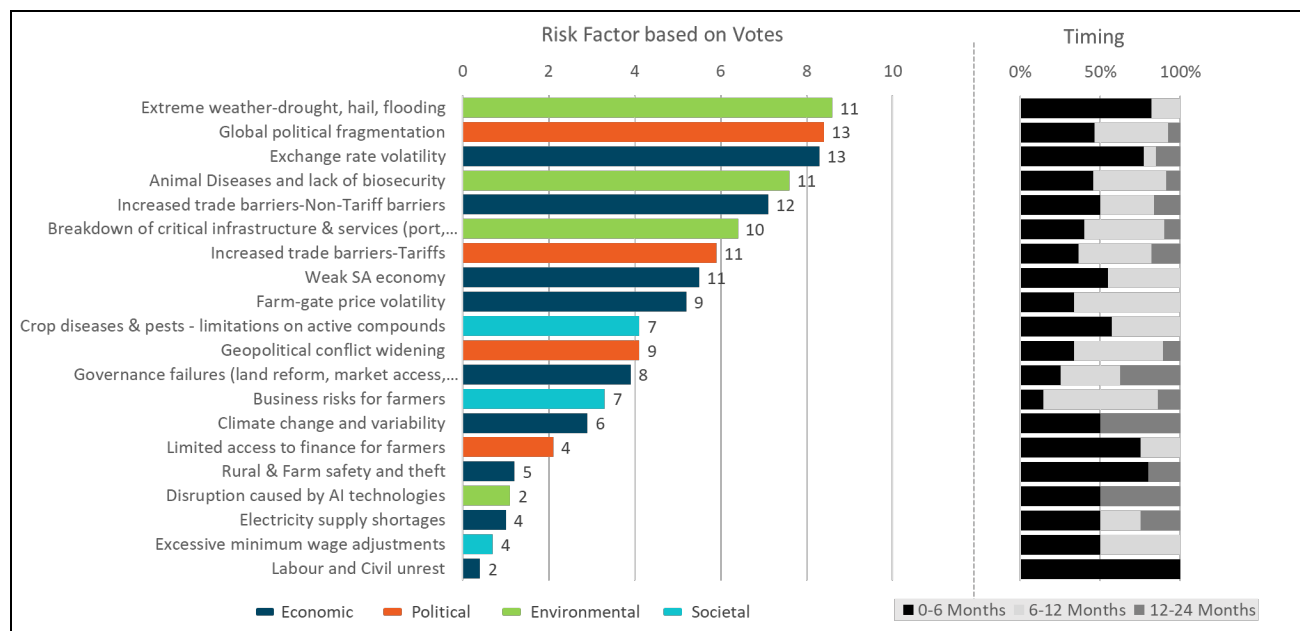


Figure 43: Most important agricultural risks and timing of impact.

Source: BFAP: (2025)

11. Public Entities

Name of Public Entity	Mandate	Outcomes	Current Annual Budget (R thousand)
Casidra SOC Ltd	Agricultural and economic development within a rural and land reform context	<p>Improved agricultural productivity, sustainability, and economic empowerment for beneficiary farms in the Western Cape.</p> <p>Increased food security for vulnerable households and communities in the Western Cape.</p> <p>Ensure Casidra's long-term financial sustainability while maximising socio-economic impact and enterprise development.</p> <p>Ensuring public trust and operational integrity.</p>	R155.703 million (inclusive of projects)

Part D: Technical Indicator Description (TID)

Indicator Number	O.1
Indicator Title	The Provincial Agricultural Sector increase its exports by at least 10% over the next 5 years.
Definition	Measuring the export of agricultural and related products from the Western Cape Province.
Source of data	Quantec database; Data Set: TRD11—RSA Regional Trade HST 6-digit
Method of Calculation / Assessment	Summation of exports of HS codes 1 – 24; 33; 41; 50 – 53.
Assumptions	The Quantec database will be updated and the province will continue to have access to the database.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Exports will be from the whole province
Reporting Cycle	Annual
Desired performance	Increased performance
Indicator Responsibility	Director: Business Planning and Strategy

Indicator Number	O.2
Indicator Title	Enhanced agri-processing capacity at both primary and secondary level.
Definition	Measuring the Gross Value Added by agri-processing in the Western Cape Province.
Source of data	Quantec database
Method of Calculation / Assessment	Summation of Food (QISC 301 – 306) and Beverages and Tobacco (QSIC 301 – 312). Measured in 2010 prices
Assumptions	The Quantec database will be updated and the province will continue to have access to the database.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	GVA will be from the whole province
Reporting Cycle	Annual
Desired performance	Increased performance
Indicator Responsibility	Director: Business Planning and Strategy

Indicator Number	O.3
Indicator Title	Increased Gross Value Added (GVA) through sustainable agricultural production in the Western Cape
Definition	Measuring the Gross Value Added by primary agricultural production in the Western Cape Province.
Source of data	StatsSA: GDP 4 th quarter: Statistical release P0441
Method of Calculation / Assessment	Data extraction
Assumptions	StatsSA will continue to publish GDP data at provincial level.
Disaggregation of Beneficiaries (where applicable)	Not applicable

Spatial Transformation (where applicable)	Agricultural production will be from the whole province
Reporting Cycle	Annual
Desired performance	Increased performance
Indicator Responsibility	Director: Business Planning and Strategy

Indicator Number	O.4
Indicator Title	Success of supported land reform projects.
Definition	Measuring the success rate of land reform projects supported by the Western Cape Department of Agriculture.
Source of data	Independent external evaluation
Method of Calculation / Assessment	Success is measured at the hand of 39 criteria covering the triple bottom line of economic, social and natural sustainability.
Assumptions	Funding will be available to contract an external evaluator. An external evaluator with the necessary skills will be available.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	The whole province will be covered.
Reporting Cycle	Every 5 years.
Desired performance	Increased performance
Indicator Responsibility	Chief Director: Farmer Support and Development supported by the Director: Business Planning and Strategy

Indicator Number	O.5
Indicator Title	Development of an enabling environment to increase agricultural and related jobs.
Definition	Measuring the number of agricultural and related jobs in the Western Cape Province.
Source of data	StatsSA: Quarterly Labour Force Survey: Statistical release P0211
Method of Calculation / Assessment	Data extraction
Assumptions	StatsSA will continue to publish employment data at provincial level.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Agricultural employment will be from the whole province
Reporting Cycle	Annual
Desired performance	Increased performance
Indicator Responsibility	Director: Business Planning and Strategy

Annexure A: District Development Model

It is important for organs of state to recognise that direct service delivery to the citizens of our country takes place at local government level. To this end the WCDoA, complementing its other consultation mechanisms, annually participates in strategic engagements with the thirty local governments of the Province. To this end, two senior managers have been allocated per district to participate in district planning activities and to build relationships. More details have already been provided in Section 3.8

As a result of this arrangement and following one on one engagements with the Garden Route District Municipality, the need for a District Agricultural Development Plan was identified. A decision was subsequently taken by the WCDoA to develop such plans for each District in the province and, due to the request received, the Garden Route District will receive first priority (see Section 6.2 for the evaluations to be completed in 2025/26).

Following a scrutiny of the Integrated Development Plans of the various districts, a list of priorities were identified (see Table 19). The agricultural priorities of these will be addressed in due course.

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