



NAMMC
Promoting market access for South African agriculture

NAMMC STRATEGIC PLAN

For

2023/24-2027/28



ACCOUNTING AUTHORITY STATEMENT

PRESENTING YOU THE 2023/24 – 2027/28 STRATEGIC PLAN

As the currently constituted Council of the NAMC we took over the reins in an environment characterised by several uncertainties both internally and externally. The COVID-19 pandemic was at its peak with the global economy experiencing significant challenges. More recently the Russia-Ukraine conflict has added further shocks to the system. These challenges required us to craft a strategy to support – in line with our mandate - an agricultural sector that grows in a more resilient, inclusive and sustainable manner. Our coordination of the crafting, implementation and monitoring and evaluation of the Agriculture and Agro-processing Master Plan (AAMP), presents a unique opportunity for the NAMC to more visibly play its evidence-based facilitation and advisory role in the agricultural sector.

This 2023/24-2027/28 revised strategy seeks to align our annual targets with the tenets of the AAMP. We will continue to build on our good track record in supporting smallholder farmers to access markets. We are heartened to indicate that this particular target has been surpassed in recent times. In the spirit of the AAMP, we will continue to forge partnerships with our stakeholders in discharging our mandate.

We will also continue to build on recent improvements in our audit outcomes by supporting the efforts of the Management team in enhancing our adherence to good governance principles and applicable legislation. We are encouraged that our relationship with the Minister has been formalised through the signing of the Shareholder Compact. This Compact provides for mutual understanding of the Honourable Minister’s strategic expectations from the Council. The Compact also recognises the need for the Honourable Minister to provide an enabling environment and requisite resources for the Council to execute its mandate.

With the above background, I hereby present the 2023/2024 -2027/2028 Strategic Plan to the Minister of Agriculture, Land Reform and Rural Development



Mr Angelo Petersen

Chairperson of Council

National Agricultural Marketing Council (NAMC)

ACCOUNTING OFFICER STATEMENT

As the Management team of the NAMC we look forward to putting more effort into building on the performance achievements of the previous strategic plan period, while bearing in mind that we need to continuously work to improve our service delivery.

We will work to minimise and eventually eliminate all legacy and address any new audit findings, on irregular, fruitless and wasteful expenditure. This will partly entail making sure risk management is part of our organisational culture. By so doing we will demonstrate that we are performing our work not only effectively, but also in a compliant manner.

In terms of execution of our core business, our partnership with and oversight over industry entities that manage trusts and statutory measures will be enhanced to become more mutually beneficial. Recently, the levy revenues and expenditures have grown. Trust assets have remained resilient in the face of global economic shocks. The Transformation Review Committee (TRC) has intensified its work, resulting in a marked improvement in many of the transformation programmes that are being implemented across the country. During this coming reporting period we will continue to engage with our industry partners to ensure that their efforts are aligned with those of the government in the context of implementation of the AAMP. Better public-private alignment will minimise resource wastage, maximise synergies and impact.

Guided by this revised strategy, we will also continue in our efforts to get more smallholder farmers linked with the market. This is an area where parliamentary oversight has been consistently focussed on, and we have been able to provide positive outcomes. The amount of research output that has been produced has grown in recent times. Its relevance has also been enhanced by the increasing number of ministerial advisory notes that have been derived from the research output. We will continue to forge research partnerships and undertake joint projects with our partners.

Following the signing of the AAMP social compact document in May 2022, there has been a strong anticipation by all stakeholders of the next steps in the process. There is a collective goodwill and commitment in implementing the AAMP. The NAMC faces the unique privilege of driving this process.

Finally, the NAMC prides itself in being a trusted voice in contemporary public discourse in areas related to our mandate. We will continue in the same vein in this strategy period.

In presenting to you the National Agricultural Marketing Council Strategic Plan 2023/24 – 2027/28, and in my role as the Accounting Officer of the NAMC, I hereby commit to the implementation of this Strategic Plan.



Dr Simphiwe Ngqangweni

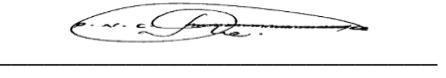
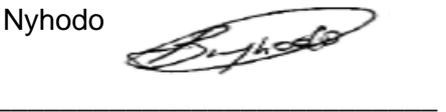
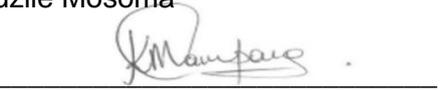
Chief Executive Officer

National Agricultural Marketing Council

Official Sign-Off

It is hereby certified that this Strategic Plan:

- Was developed by the management of the NAMC under the guidance of the NAMC Council;
- Takes into account all the relevant policies, legislation and other mandates for which the NAMC is responsible; and
- Accurately reflects the strategic goals and objectives which the NAMC will endeavour to achieve over the period 2023/24 – 2027/28

PROGRAMME	SIGNATORY
Programme 1	<p>Dr. Simphiwe Ngqangweni Signature: </p> <p>Ms Irene Mathatho Signature: </p> <p>Ms Nolwazi Simelane Signature: </p>
Programme 2	<p>Mr Schalk Burger Signature: </p> <p>Dr Tempia Ndiadvha Signature: <u>Ndiadvha Tempia</u></p> <p>Mr. Bonani Nyhodo Signature: </p>
Programme 3	<p>Ms Khumbuzile Mosoma Signature: </p> <p>Dr Tempia Ndiadvha Signature: <u>Ndiadvha Tempia</u></p>
Chief Financial Officer	<p>Ms Irene Mathatho Signature: </p>

PROGRAMME	SIGNATORY
Chief Executive Officer	Dr. Simphiwe Nqanqweni Signature: 
Chairperson of Council	Approved by: Signature:  Mr Angelo Petersen Chairperson of the Council

Table of Contents

Definitions	viii
Abbreviations	viii
PART A: OUR MANDATE	1
1. Constitutional mandate	1
2. Legislative and policy mandates	2
3. Institutional Policies and Strategies over the five-year planning period.....	4
4. Relevant Court Rulings	4
PART B: OUR STRATEGIC FOCUS	6
1. Vision	6
2. Mission	7
3. Values	7
4. Situational analysis	7
5. External Environment Analysis	8
5.1. World and South African economic outlook.....	8
5.2. Impact of Russia/ Ukraine conflict SADC and South Africa	8
5.3. The South African agricultural sector performance.....	9
5.4. Women, Youth and Persons with Disabilities	10
6. Internal Environment Analysis.....	11
PART C: Institutional Performance Information	15
1. Impact statement	15
2. Measuring Our Outcomes	15
3. Explanation of Planned Performance over the Five-Year Planning Period	19
4. UPDATED KEY RISKS AND MITIGATION	22
PART D: Technical Indicator Descriptions (TID)	26

Definitions

Statutory measures	“ Statutory measures ” means a levy contemplated in section 15, and a direction contemplated in sections 16, 18 and 19 of the MAP Act.
Industry Trusts	Trust within the Context of the MAP Act 47 of 1996 refers to bodies that were formed and became recipients of the assets and funds of the former control boards. The Trust Property Act, 57 of 1988 defines a “trust” as <i>the arrangement through which the ownership of property of one person is by a trust instrument made over or bequeathed.</i>
Transformation	Refers to ensuring that the previously disadvantaged individuals actively participate in the entire agricultural value chain and broadly contribute to the economic development of the country.
Smallholder producers/farmers	Refers to a producer that produces (at primary, secondary, and tertiary levels) for household consumption and markets, therefore farming is consciously undertaken to meet the needs of the household and derive a source of income. These are usually the new entrants aspiring to produce for the market at a profit with a maximum annual turnover of up to R5 million per annum.
Market Access Models	Refers to models that enable smallholder producers to sell their agricultural produce in a market. The models are used to organise producers to deal with the quality and quantity as per market requirements as well as addressing comprehensive producer support during production.
Directly Affected Groups	“ Directly affected group ” means any group of persons who is a party to the production, sale, purchase, processing or consumption of an agricultural product and includes labour employed in the production or processing of the such product.
Minister	Refers to the Minister of the Department of Agriculture, Land Reform and Rural Development.
Department	Refers to the Department of Agriculture, Land Reform and Rural Development.

Abbreviations

NAMC	National Agricultural Marketing Council
DALRRD	Department of Agriculture, Land Reform and Rural Development.
ADD	Agribusiness Development Division
AMP	Agricultural Master Plan
ARC	Agricultural Research Council
DAG	Directly Affected Groups
ICT	Information, Communication Technology
IT	Information Technology
ITAC	International Trade Administration Commission
FMD	Foot and Mouth Disease
MAP ACT	Marketing of Agricultural Products Act No. 47 of 1996
MERC	Markets and Economic Research Centre
MTEF	Medium-Term Expenditure Framework
MTSF	Medium-Term Strategic Framework
NDP	National Development Plan
OBP	Onderstepoort Biological Products
PPECB	Perishable Produce Export Control Board
RSA	Republic of South Africa
SOE	State-owned Entity
US	United States
WTO	World Trade Organization



Part A

PART A: OUR MANDATE

1. Constitutional mandate

The constitutional basis of the work done by the NAMC rests in the mandate of the Department of Agriculture, Land Reform and Rural Development (DALRRD) which in turn is derived directly from the Constitution of the Republic of South Africa (Act No.108 of 1996). The specific sections of the Constitution (Act 108 of 1996) that applies to the DALRRD and thereby the NAMC are Sections 24, 25 and 27 of Chapter 2, of the Bill of Rights. Section 24 deals with environmental rights, including “secure ecologically sustainable development and use of natural resources while promoting justifiable economic and social development. Land reform which aims to bring about equitable access to all of South Africa’s natural resources is addressed in Section 25(4)(a). The right to access food and water is reflected in Section 27(1)(b). The provision for food security covers the agriculture value chain from inputs, production, value add (Agro-processing), and marketing to retailing.

The NAMC as a statutory organisation of the DALRRD derives its mandate directly from the MAP Act. The NAMC was established by the Department and in terms of Marketing of Agricultural Products (MAP) Act No. 47 of 1996, as amended by Act No. 59 of 1997 and Act No. 52 of 2001. The MAP Act essentially provides for the authorisation, establishment and enforcement of regulatory measures to intervene in the marketing of agricultural products including the introduction of statutory measures on agricultural products. The NAMC plays an active role in the coordination of the work relating to the four statutory measures mentioned in the Act, coordinates the work of industry trusts, undertakes thorough research aimed at advising the Minister and DAGs on marketing and economic matters and works directly with farmers to address their marketing matters.

2. Legislative and policy mandates

The Marketing of Agricultural Products (MAP) Act and its subsequent amendments

The mandate of the NAMC is enshrined in the MAP Act, which authorises the establishment and enforcement of regulatory measures to intervene in the marketing of agricultural products e.g., the introduction of statutory measures. The NAMC is established by Section 3 of the MAP Act and the functions of the NAMC particularly feature in section 9 of the Act, this section stipulates that -

“Functions of Council

9. (1) *Subject to the provisions of section 2, the Council-*
- (a) shall, when requested by the Minister, or of its own accord, investigate, in terms of section 11(2), the establishment, continuation, amendment or revocation of statutory measures affecting the marketing of agricultural products, evaluating the desirability, necessity or efficiency and if necessary, proposing alternatives to the establishment, continuation, amendment or repeal of a statutory measure and report to and advise the Minister accordingly;*
 - (b) shall prepare and submit to the Minister for consideration Statutory measures and changes to statutory measures which the Minister directs it to prepare;*
 - (c) shall, whenever requested by the Minister and at least once annually, report on the activities of the Council;*
 - (d) may direct any institution or body of persons designated for the purpose of the implementation or administration of a statutory measure in terms of section 14, to furnish the Council with such information pertaining to a statutory measure as the Council, the Minister or the parliamentary committees may require;*
 - (e) may undertake investigations and advise the Minister regarding-*
 - (i) agricultural marketing policy and the application thereof;*
 - (ii) the coordination of agricultural marketing policy in relation to national economic, social and development policies and international trends and developments; and*
 - (iii) the possibilities for promoting the objectives mentioned in section 2(2); and*
 - (iv) the effect that the marketing of products has on the objectives mentioned in section 2(2)*
 - (f) shall monitor the application of statutory measures and report thereon to the Minister and shall evaluate and review such measures at least every two years.*

(2) Copies of all reports which are submitted to the Minister in terms of subsection (1) shall simultaneously be despatched to the parliamentary committees for their information.

The NAMC performs the above-mentioned mandate in support of the four (4) objectives of the MAP Act, i.e.:

- Increasing market access to all market participants,
- Promotion of efficiency in the marketing of agricultural products,
- Optimise export earnings from agricultural products, and
- Enhancement of the viability of the agricultural sector.

LEGISLATION	BRIEF DESCRIPTION
Agricultural Pests Act (No 36 of 1983)	Provides measures to prevent and combat agricultural pests.
Agricultural Produce Agents Act (No 12 OF 1992)	Provides for the establishment of an Agricultural Produce Agents Council and fidelity funds in respect of agricultural produce agents and the control of certain activities of agricultural produce agents.
Agricultural Product Standards Act (No 119 of 1990)	Provides for control over the sale and export of certain agricultural products, control over the sale of certain imported products and control over other related products.
Agricultural Produce Agents Act, 1992 (Act No.12 of 1992)	Provides for the establishment of an Agricultural Produce Agents Council and fidelity funds in respect of agricultural produce agents and the control of certain activities of agricultural produce agents.
Animal Diseases Act (No 35 of 1984)	Provides for the control of animal diseases and parasites and for measures to promote animal health.
Animal Improvement Act (No 62 of 1998)	Provides for the breeding identification and utilisation of genetically superior animals to improve the production and performance of animals.
Fencing Act (No 31 of 1963)	Consolidates laws relating to fences and the fencing of farms and other holdings and matters incidental thereto.
Fertilisers, Farm Feeds, Agricultural Remedies and Stock Remedies Act (No 36 of 1947)	Includes provisions in respect of the regulation or prohibition of the importation, sale, acquisition, disposal or use of fertilisers, farm feeds, agricultural remedies and stock remedies and the designation of technical advisors and analysts.
Liquor Products Act (No 60 of 1989)	Includes provisions for control over the import and export of certain alcoholic products.
Meat Safety Act (No 40 of 2000)	Includes provisions/measures to regulate the importation and exportation of meat, and to establish and maintain essential national standards in respect of abattoirs.
Perishable Products Export Control Act (No 9 of 1983)	Provides for the control of perishable products intended for export from the Republic of South Africa.
Subdivision of Agricultural Land (Act 70 of 1970)	Provides for the sub-division and, in connection therewith, the use of agricultural land
National Development Plan (NDP)	The NDP advocated for agricultural development based on successful land reform, employment creation and strong environmental safeguards.
Agriculture Policy Action Plan (APAP)	APAP aims at promoting labour absorption and broadening market participation through well-considered, adequately consulted and finely-tuned strategic interventions.
Integrated Growth and Development Plan (IGDP)	The IGDP focuses on three strategic issues, namely equity and transformation, equitable growth and competitiveness and environmental sustainability.
MAFISA Credit Policy Framework	Provides for provision of funding through accredited Retail Lending Entities to on-lend to targeted end-users within pre-determined target areas.

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

The NAMC will not be developing any institutional policies and strategies over the 5-year planning period. However, the NAMC has tasked the Department of Agriculture, Land Reform and Rural Development (DALRRD) to research and coordinate the development of the Agriculture and Agro-processing Master Plan (AAMP). In addition, the NAMC through its function is actively contributing to and participate in the development of policies and strategies that impact its work. Examples of policies that the NAMC will contribute to are the DALRRD's Agricultural Insurance Policy Framework, Rural Development Strategy, Rural Safety Policy, Comprehensive Agricultural Statistics Policy, Agricultural Trade Policies, Climate Change Policy and Emission Inventory Programme, Animal Identification and Traceability Strategy, National Policy in Organic Production, Crop Production Policy, National Policy on Plant Improvement, State Assets Acquisition and Lease Disposal Policy, Agricultural Land Holdings Policy Framework, Agricultural Produce Agencies Amendment Bill, Communal Land Recordal Framework and Land Tenure Policy for Commercial Farming Framework. In the course of performing its core functions, the NAMC provides the Minister with policy advice and statutory measures recommendations that inform and guide agricultural policies and strategies.

4. Relevant Court Rulings

There are no Court Rulings with significant, ongoing impact on the operation or service delivery of the NAMC.



Part B

PART B: OUR STRATEGIC FOCUS

1. Vision

The Vision of the NAMC is captured as the “***strategic positioning of agriculture in a dynamic global market***”.

This Vision is aligned with the DALRRD’s Mission which includes “...improve agricultural production to stimulate economic development and food security through, amongst others, innovative sustainable agriculture and promotion of access to opportunities for youth, women and other vulnerable groups.

It also speaks to the sustainable agricultural productivity element of the DALRRD’s Impact Statement. As stated in the DALRRD’s Strategic Plan for 2020-2026 (dated 24th October 2019), “Sustainable Agricultural Productivity refers to a functioning system which ensures that food is produced optimally using available resources including adequate access to fertile land, water, agricultural inputs, funding, markets, production capability (i.e., research, bio-security, skills, etc) within the short and long term”.

Specifically, the NAMC Vision indirectly responds to:

Priority 2: Economic Transformation and Job Creation

Outcome: Investing in accelerated inclusive growth & Re-industrialization of the economy and emergence of globally competitive sectors:

- Create jobs through Job Summit Commitments and other public sector employment programmes; and
- Create a conducive environment that enables national priority sectors to support industrialisation and localisation, leading to increased exports, employment, and youth- and women-owned SMME participation.

Priority 3: Education, Skills and Health

- Expand access to Post-Secondary Education and Training (PSET)
- Extension policy reviewed to support the implementation of the agriculture and Agro-processing master plan and provide advisory services to commodity groups

Priority 5: Spatial Integration, Human Settlements and Local Government

Outcome: Integrated service delivery, settlement transformation & inclusive growth in rural and urban places

- Develop and implement district/metro Joined-Up Plans

- Develop Regional Spatial Development Frameworks
- Support addressing of development objectives and local needs through piloting, refinement and implementation of the District Development Coordination Model
- Identify and use derelict government land and buildings in urban and rural areas as a catalyst for spatial transformation in support of the NSDF and IUDF objectives, including land and agrarian reform. (9 993 Ha identified – custodianship of national DPWI identified for human settlements purposes)
- National Spatial Development Framework (NDSF)
- Sustainable land Reform

2. Mission

The Mission of the NAMC is to “Provide marketing advisory and regulatory services to key stakeholders in support of a vibrant agricultural marketing system in South Africa”. The Mission is aligned with the Vision of the NAMC and expresses the core functions that the NAMC performs as stipulated in Section 9 of the MAP Act No 47 of 1996.

3. Values

The following values are adopted as our commitment to entrench and deepen the “NAMC” way, both in our behaviour and service offering.

- **Integrity** (honesty / ethical/trustworthy/transparent)
- **Assertiveness** (accountable / responsible / reliable / taking ownership / confident)
- **Collaboration** (consultative / teamwork / participative/cooperative)
- **Service excellence** (performance driven / target oriented / service oriented / motivated/committed/diligent)
- **Fairness** (equal treatment/respect/tolerance/consistency)
- **Objectivity** (analytical/rational / attention to detail / conceptual)
- **Innovation** (creative / pro-active / adaptive/flexible / initiative)

4. Situational analysis

The performance and achievements of the NAMC are directly impacted by external and internal factors and contexts. The external context includes the advent of the global coronavirus (COVID-19) in 2019, the subdued global economy as a result of the triple effects of the slow recovery from the global coronavirus pandemic (Covid 19), the ongoing conflict between Russia and Ukraine, as well as higher inflationary pressures in the global economy. The subsequent effects of regulations on global and domestic demand-supply interactions for food, trade and labour markets have had a noticeable impact, with the country’s Gross Domestic Product (GDP) slowing by 0, 7% in Quarter 2 of 2022 and the unemployment rate

reaching the 30% mark. The availability of financial (budget) and human (skills) resources for the work of the NAMC constitute some of the internal contexts of the NAMC's operations. Both the internal and external factors underpinning the performance of the NAMC are unpacked below. Both the internal and external factors underpinning the performance of the NAMC and ultimately MERC are unpacked below.

5. External Environment Analysis

5.1. World and South African economic outlook

According to the International Monetary Fund (IMF) World Economic Outlook Update published in July 2022, several shocks have hit the world economy that was already weakened by the global Covid-19 pandemic. These shocks include higher-than-expected inflation worldwide (especially in the United States of America and major European economies), a worse-than-anticipated slowdown in China as a result of several Covid-19 outbreaks and the resultant lockdowns, as well as the further negative spillovers from the ongoing war between Russia and Ukraine. As a result, the IMF forecasts a baseline global growth of 3.2 percent in 2022 and this is 0.4 percent lower than what was projected in April 2022. In the same July 2022 IMF World Economic Outlook update, global inflation was revised due to increasing food and energy prices as well as lingering supply-demand imbalances. Global inflation is anticipated to reach 6.6 percent in advanced economies in 2022 and 9.5 percent in emerging economies during the same period. In 2023, the IMF predicts that deflationary monetary policy (such as the rising of interest rates) will slow down the global economy, with global output expected to grow by a mere 2.9 percent.

The GDP growth for South Africa in 2022 is projected by the IMF at 2.3 percent, while it is expected to slow down to 1.4 percent in 2023. According to the 2022 Budget Review report of the National Treasury, structural constraints continue to reduce potential economic growth and remain an impediment to economic recovery. The economic effects of the Covid-19 pandemic (lost jobs and delayed investments) continue to be exacerbated by inadequate electricity supply. Higher global and local inflation, fluctuations in commodity and input prices (mainly towards the upside), and the ongoing geopolitical risks continue to contribute to elevated uncertainty in the South African economy over the short-to-medium term.

5.2. Impact of Russia/ Ukraine conflict SADC and South Africa

With Russia and Ukraine together accounting for nearly 30 percent of global wheat exports in 2021, about 14 percent of global maize exports, about 32 percent of global barley exports, almost 60 percent of global sunflower oil exports, and about 14 percent of global fertilizer exports, the continuing conflict between Russia and Ukraine is expected to have a significant impact in the world economy, especially in emerging economies that rely on imports to meet

their domestic food security shortfalls. An analysis conducted by the NAMC for the Food and Agriculture Organisation (FAO) and the Southern African Development Community (SADC) indicates that agriculture and food trade relation between SADC and Russia/Ukraine equates to about 2.3 percent, implying it is weak at an aggregate level. However, trade is strong in commodities such as fertilizer, wheat, and sunflower oil, where Russia and Ukraine collectively supply between 5 percent and 20 percent in various countries within the SADC region. For example, the agriculture and food trade relation between Russia and the Democratic Republic of Congo was measured at 9.3 percent in 2021 and this goes up to 13.2 percent for Tanzania. South Africa's trade relationship with the two countries is around 2.4 percent, also dominated by fertilizer, wheat, and oil commodities. South Africa also exports large quantities (average 350 000 tons per year) of fruits to Russia, as it is seen as a new strategic Eastern Europe market.

5.3. The South African agricultural sector performance

The 2022 Budget Review report of the National Treasury indicates that the agricultural sector is expected to continue growing in 2022 in response to broadly favourable conditions. However, the ongoing logistics disruptions and animal health concerns (including the foot and mouth disease outbreak) present risks to the sector. Data released by Statistics South Africa (StatsSA) during September 2022 indicate that GDP decreased by 0.7 percent in the second quarter of 2022, following an increase of 1.7 percent in the first quarter of 2022. The agricultural industry decreased by 7.7 percent during the same period and contributed -0.7 percent to GDP growth. According to StatsSA, the decline in the agricultural industry was mainly due to decreased production of animal products. However, good summer and winter rains, coupled with favourable prices, are expected to sustain growth throughout the year despite the second-quarter contraction. Summer field crops and horticulture are expected to expand during 2022 due to the anticipated La Nina impact, which is related to above-average precipitation. According to the Quarterly Labour Force Survey report for quarter 2 of 2022 released by StatsSA in August 2022, there was a total of 874 000 people employed in the agricultural industry during the second quarter of 2022 (April to June 2022). This represented 12 000 (or 1.2 percent) more people employed in the industry compared to the same quarter in 2021. Overall, employment in the South African economy increased by 648 000 in the second quarter of 2022, and the largest increases in employment were recorded in community and social services (276 000), followed by trade (169 000), finance (128 000) and construction (104 000).

Moreover, the changing global trade environment, characterized by strict environmental protection laws and sanitary and phytosanitary regulations driven by major economic players has devastating economic effects on the performance of the sector. The increasing incidence

of disease outbreaks such as Avian Influenza, Foot and Mouth Disease and lately COVID-19 as well as global trade distortions also affect the domestic agricultural market and trade relations with our partners and access to their markets. Collectively this harms agricultural production and the contribution of the sector to economic growth and job creation.

Market access remains one of the major restraining factors towards agricultural growth. The South African agriculture industry benefited from substantial state support over most of the apartheid period. Mainly established commercial farmers benefited from import protection, state subsidies, guaranteed prices and access to production technology. Support was however largely concentrated around field crops (maize, wheat) and dairy, while other sub-sectors such as horticulture and poultry received limited support. Although the liberalisation of agricultural markets in the 1990s had a significant impact on the sector, the legacy of apartheid policies continued to shape the present-day land use patterns and structure of agricultural production in South Africa. Agricultural production remains concentrated on low-value and less-labour-intensive field crops despite substantial growth in exports of high-value products. On the other hand, the downstream agro-processing industry has been a recipient of support as part of post-apartheid targeted industrial policy with associated growth in value-added processed food products. However, support has been oriented towards a few large highly concentrated firms at the exclusion of emerging farmers. To address the lack of market access it is important to analyse trends over time to understand the nature, process and extent of structural transformation in selected agricultural and agro-processing value chains in South Africa. This will assist policymakers to formulate targeted policies given the factors that have influenced the observed patterns in structural transformation in a particular agricultural sub-sector.

5.4. Women, Youth and Persons with Disabilities

Over and above the promotion of general transformation, the NAMC is leading the effort to empower vulnerable groups in agriculture as this objective is central to the development of the agriculture and Agro-processing master plan. Apart from coordinating the AAMP, the NAMC contributes to the empowerment of women, youth and persons living with disabilities through the design of market access models and market access facilitation programmes.

Through these sectoral interventions, the NAMC strives to achieve inclusive and sustainable agricultural growth that also creates jobs for all and ensures food security. Furthermore, the NAMC has been actively advocating for the diversification of boards managing the agricultural trusts to ensure a proper representation of women, youth and persons with disabilities on the boards. To this effect, nearly 50% of Ministerial representatives in agricultural trusts are now women

6. Internal Environment Analysis

The NAMC prides itself on a team of highly qualified and experienced economists that strategically place the organisation at the forefront of providing policy advisory to the policymakers and directly affected stakeholders. However, challenges related to capacity building remain and readily available analytical tools may compromise the role of MERC in providing timeous, relevant economic advice based on scientific research to the stakeholders. The policy advice emanates from the research outputs that MERC produces throughout the year. The research output includes food price monitoring, food cost, commodity value chain analysis, trade policy analysis and identification of market opportunities as well as models to integrate smallholder farmers into the formal agricultural markets. To address this challenge, there is a need to conduct a needs analysis to establish the inventory of analytical tools and access to data sources necessary to conduct research as well as build capacity to ensure that the skill development and capacity development initiatives are fit for purpose. The NAMC's contribution of its core divisions to this mandate is summarized in the table below.

Table 1: Core Divisions' contribution to the NAMC mandate

Division	Contribution to the NAMC mandate
Agribusiness Development	The agribusiness development division contributes to the NAMC mandate by designing market access models that enable farmers to participate in the new and existing markets as well as facilitate market access for farmers.
Agricultural Industry Trusts	The Agricultural Industry Trusts play a role in ensuring that the assets of the trusts are safeguarded and used to ensure the viability of the agricultural sector.
Markets and Economic Research Centre (MERC)	Is mandated to provide timeous and relevant market and economic advice which is scientific and evidence-based to the Minister of Agriculture, Land Reform and Rural Development and the Directly Affected Groups (DAGs) to ensure that the South African agricultural sector is strategically positioned in a globally dynamic environment.
Statutory Measures	The NAMC investigate applications for statutory measures in terms of the MAP Act and advises the Minister accordingly.

6.1. Agricultural transformation funded through agricultural industry trust funds and statutory measures (levies)

According to the latest NAMC report on the status of agricultural industry trusts (2021 survey), the expenditure spent by the various agricultural industry trusts on transformation activities was R63.07 million. This represented an R13.54 million decrease compared to the

previous survey period (2020). Agricultural industry trusts are crucial in facilitating transformation in the various industries and their efforts need to be supported by especially the government and other stakeholders. Some of the critical initiatives funded through industry trust funds include enterprise development as well as skills development and training. The NAMC status report on statutory measures (2021 survey) indicates that a total of R698.2 million was spent on industry functions in 2021, representing a 6 percent increase compared to the R658.7 million that was spent in 2020. Of the total expenditure, about 21.1 percent (R147.2 million) was spent on transformation projects. It is critical to indicate that this is above the 20 percent benchmark that is recommended by the NAMC and prescribed by the Minister when approving the various applications for statutory levies by industries. The overall levy transformation expenditures by the various industries increased from R79.8 million in 2015 to R210.3 million in 2021, representing an increase of 78 percent over seven years.

6.2. Research-based Policy and Statutory Measure/s Proposals through the MERC Division

SECTION 9(1) (e) (i) and (ii) of the MAP Act empowers the NAMC to advise the Minister regarding agricultural marketing policy and the application thereof; and the coordination of agricultural marketing policy in relation to national economic, social and development policies, as well as international trends and developments. The MAP Act authorizes the establishment and enforcement of regulatory measures to intervene in the marketing of agricultural products, including the introduction of levies on agricultural products; to establish a National Agricultural Marketing Council; and to provide for matters connected therewith. The functions of the NAMC are executed through its core divisions through the facilitation of the statutory measures, overseeing the agricultural trusts and providing advisory services to the Minister of DALRRD and Directly Affected Groups (DAGs).

The NAMC was tasked by Minister to coordinate the research and consultations of stakeholders to gain insights and develop the sectoral master plan and its contribution to the country's Economic Reconstruction and Recovery Plan. The NAMC successfully developed the Agriculture and Agro-processing Master Plan (AAMP) which was signed and endorsed by policymakers and captains of industries on the 12th of May 2022. The AAMP encourages meaningful partnerships between private and public institutions to leverage available resources, knowledge and skills to bring in efficiency and predictability in agricultural policies and regulations, upscale production and value-add on produce originating from commercial and non-commercial areas, create sustainable jobs and decent employment conditions in farms, enhance food security at the household level, and strive for inclusive growth underpinned by a comprehensive farmer support programme.

The NAMC through its research and technical divisions is entrusted to monitor and evaluate the implementation progress, using its research tools and systems available within the NAMC. Parallel to monitoring the AAMP, the NAMC will continue to provide evidence-based advisory services to policymakers, industry captains, and DAGs. In the domain, the research will determine the trade policy space available to deepen the localisation of food and import substitution, where South Africa has comparative and competitive advantages. Furthermore, the NAMC will continue to facilitate statutory measures to assist the private sector to strengthen generic services such as the collection of industry data, research for development and transformation and markets, in particular export markets to optimise foreign earnings. Lastly, the NAMC research and advisory services will design innovative market access models to enhance the participation of small-scale and emerging farmers.

6.3. Market Access for Smallholder Farmers

Despite the numerous support programmes for smallholder farmers that the NAMC has implemented in the past, market access for these farmers remains a challenge due to the lack of comprehensive support, inconsistent production, fluctuating quality and transport costs to markets. The NAMC's Agri-business Development division designs Market access models that link smallholder farmers to the markets and integrate them into the commercial mainstream. The market facilitation programme is guided by market analysis, market readiness of farmers, market demand and stakeholder intervention to support farmers to supply the identified market. These programmes enable the NAMC to contribute to making the agricultural sector more inclusive and viable as a contributor to economic growth and transformation. The NAMC will contribute to increasing the smallholder farmers' market share, by linking 360 farmers to market opportunities by the end of the 5 - year period.

6.4. Organisational capacity

The NAMC core staff is made up of economists and this has turned the organization to be a breeding pot for agricultural economists in the country. The highly qualified and experienced economists strategically place the NAMC at the forefront of providing policy advisory to the policymakers and directly affected stakeholders. Moreover, the NAMC has recruited and upskilled young economists to drive research intelligence and marketing policy analysis for the sector. This suggests that the organization has the capable human capacity to drive the new strategy.



Part C

PART C: Institutional Performance Information

1. Impact statement

The impact statement of the successful implementation of this Strategic Plan is based on and directly aligned with the Vision and Mission of the NAMC and the political priorities for the 6th term of administration.

Impact Statement	A viable and inclusive agricultural marketing system contributing to food security, socioeconomic growth and sustainable development.
------------------	---

2. Measuring Our Outcomes

The three (3) NAMC strategic outcomes are as follows:

- The NAMC delivers on its mandate and core functions;
- A viable and efficient agricultural sector generating optimal earnings (domestic and international); and
- Enhanced market access for the agricultural sector participants.

The outcomes against which the NAMC can be measured are derived directly from the four objectives of the Marketing of Agricultural Products Act (MAP Act) namely:

- Increasing market access to all market participants,
- Promotion of efficiency in the marketing of agricultural products,
- Optimise export earnings from agricultural products; and
- Enhancement of the viability of the agricultural sector.

Through investigating and monitoring the effective implementation of the statutory measures and safeguarding the agricultural trusts' assets, the NAMC contributes to the enhancement of the sector's viability. The evidence-based policy advisory generated for industry captains and policymakers through research publications and market access programmes for smallholder farmers enables the NAMC to promote market efficiency and access as well as the optimisation of export earnings. Through the research and oversight functions, the NAMC indirectly assists the Department of Agriculture, Land Reform and Rural Development to achieve its national priorities reflected as the

Medium-Term Strategic Framework (MTSF) priorities / Outcomes, ERRP goals of food security and sustainable rural economy and AAMP vision of inclusive growth. Furthermore, the NAMC assists with priority number one of seven for the 6th term of administration outlined in the June 2019 State of Nation Address (SONA), which is achieving economic transformation and job creation.

MTSF Priority/ DALRRD Outcome	<ul style="list-style-type: none"> • Improved governance and service excellence • Increased Market Access and maintenance of existing market • Growth of inclusivity within agricultural value chains 		
Outcomes	Outcome Indicators	Baseline	Five-year target
The NAMC delivers on its mandate and core functions	Compliant management and good governance of the entity, throughout the current term of governance.	The NAMC achieved three clean audits and two unqualified audit opinions over the past five years.	The NAMC functions at optimal levels deliver on its core-function indicators and receive unqualified audit opinions for each financial year of the 5 years Achievement of ICT services targets in operational plans of each financial year
A viable and efficient agricultural sector generating optimal earnings (domestic and international); ¹	Approved policy advisory that facilitates the marketing of agricultural products, throughout the term of governance.	The NAMC provided 100% policy of scheduled advisory notes to policymaking institutions.	NAMC approved policy advisory and statutory measures of each financial year of the 5 years are adopted by the Minister and implemented by all directly affected stakeholders
	Approved statutory measures recommendations submitted to the Minister.	The NAMC evaluated statutory measures in about 80% of agricultural industries	
	NAMC annual reports reflect the transformation of the sector	An annual average of 20% of statutory levies is spent on transformation activities	An annual average of 20% of levies is spent towards the funding of transformation activities
Enhanced market access for agricultural sector participants ²	NAMC annual reports reflect increased market access	Smallholder farmers hold a 3% share of the agricultural market	The NAMC will contribute to increasing the smallholder farmers' market share, by linking 360 farmers to market opportunities by the end of the 5 - year period.

¹ Aligned to Section 2 (b), (c) and (d) of the MAP Act

² Aligned to Section 2 (a) of the MAP Act

MTSF Priority/ DALRRD Outcome	<ul style="list-style-type: none"> • Improved governance and service excellence • Increased Market Access and maintenance of existing market • Growth of inclusivity within agricultural value chains 		
Outcomes	Outcome Indicators	Baseline	Five-year target
	NAMC annual reports reflect increased export growth of agricultural products	The agricultural export growth rate fluctuated between 1.9% and 3.5% over the past five years.	Contribute to the 2% average growth in agricultural exports, through research initiatives.

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

3.1. Contribution to the MTSF and the mandate of the NAMC including, where applicable, priorities about women, youth and people with disabilities.

Contribution to the MTSF

The DALRRD contributes to the following 3 (three) of the 7 (seven) Government Priorities:

Priority 2: Economic Transformation and Job Creation

Outcome: Investing in accelerated inclusive growth & Re-industrialization of the economy and emergence of globally competitive sectors:

- Create jobs through Job Summit Commitments and other public sector employment programmes; and
- Create a conducive environment that enables national priority sectors to support industrialisation and localisation, leading to increased exports, employment, and youth- and women-owned SMME participation.

Priority 3: Education, Skills and Health

- Expand access to Post-Secondary Education and Training (PSET)
- Extension policy reviewed to support the implementation of the Agriculture and Agro-processing master plan and provide advisory services to commodity groups

Priority 5: Spatial Integration, Human Settlements and Local Government

Outcome: Integrated service delivery, settlement transformation & inclusive growth in rural and urban places

- Develop and implement district/metro Joined-Up Plans
- Develop Regional Spatial Development Frameworks
- Support addressing of development objectives and local needs through piloting, refinement and implementation of the District Development Coordination Model
- Identify and use derelict government land and buildings in urban and rural areas as a catalyst for spatial transformation in support of the NSDF and IUDF objectives, including land and agrarian reform. (9 993 Ha identified – custodianship of national DPWI identified for human settlements purposes)
- National Spatial Development Framework (NDSF)
- Sustainable land Reform

Outcome 1 of the NAMC, i.e. “The NAMC delivers on its mandate and core functions” contributes to Outcome 1 (improved governance and service excellence) of the DALRRD which is overarching and applicable to all the sectors the Department works with. Compliant management and good governance of the NAMC, which is reflected in its financial

management and corporate services functions, will enable the institution to deliver on its mandate and core functions and thus Outcome 1 speaks to this.

Outcome 2 of the NAMC, i.e. “A viable and efficient agricultural sector generating optimal export earnings” contributes primarily to Outcome 5 (Increased market access and maintenance of existing markets) of DALRRD. However, the NAMC also provides research, policy proposals and statutory measures that impact the policy environment. In addition, this outcome includes initiatives that transform the sector, increase export earnings from agricultural products and increase market access for smallholder farmers.

Outcome 3 of the NAMC, i.e., “Enhanced market access for the agricultural sector” contributes to Outcome 5 (Increased market access and maintenance of existing markets). This outcome is aligned with Objective 2(A): Increasing market access for all market participants.

Contribution to the mandate of the NAMC

The mandate of the NAMC is to undertake investigations, advise the Minister on Agricultural Marketing policy and develop statutory measure proposals, for the Minister’s consideration and adoption, in support of the four (4) objectives of the MAP Act, i.e.:

- Increasing market access to all market participants,
- More efficient marketing of agricultural products,
- Increased export earnings from agricultural products, and
- Enhanced viability of the sector.

The NAMC is also mandated to investigate the implementation of and compliance with the statutory measures and is tasked with managing the establishment of Agricultural Industry Trusts which is the main mechanism for facilitating the development of a more inclusive sector.

Outcomes 2 and 3 directly contribute to the various elements of the NAMC’s mandate and core functions.

Enablers to achieve 5-year targets

The following are the enablers to achieving the NAMC’s 5-year targets:

- Human capital and a conducive working environment
- Budgetary availability to execute the mandate
- Technological and working tools
- Effective stakeholder management
- Effective support from the shareholder department

Contribution to achieving the Impact

All the outcomes, collectively and individually, contribute to achieving the impact. However, Outcomes 2 and 3 are the dominant contributors. This collective and individual contribution is summarised below.

Outcome 1 relates to the support functions required to enable the core functional areas to perform at optimal levels and to deliver the outcomes specific to the NAMC's mandate. This outcome incorporates the principles of good governance and management, as well as effective, efficient and prudent use of resources. It encompasses Strategic management, governance and accountability; Financial Management, Human Resource Management; ICT; Financial Management; Communications and Enterprise Risk Management services.

Outcome 2 deals with the policy and statutory measure proposals that the NAMC is expected to develop and submit as per the MAP Act, and which will contribute to achieving the 4 objectives of the said Act. This outcome contributes to the marketing system, food security and economic growth and development aspects of the impact statement.

Outcome 3 deals with access to markets which contributes to the elements of "a viable marketing system, economic growth and development" in the impact statement. This outcome ensures that the trusts' assets are protected and utilised efficiently in the development of existing and new entrants into the agricultural sector. In addition, research on smallholder market access is conducted, to promote market access models that are aimed at increasing market access, encouraging new business development and capacity building for smallholder farmers/agri-businesses.

4. UPDATED KEY RISKS AND MITIGATION

Risk Name	Risk Description	Control Improvement Plan
SR1	Inadequate capacity to support core functions	a) To implement continuous training on the organisational processes; NAMC staff, oversight structures and other stakeholders b) To review and ensure proper capacity (expertise) is sought and maintained; c) To initiate a programme for reskilling officials based on budget availability; d) To continuously ensure a safe working environment for all NAMC employees in line with the OHS Act; e) Review Human Capital policies and procedures as and when required; f) Facilitation of teambuilding sessions; g) Explore models for income generation (resource mobilisation); h) Develop a stakeholder universe (SOP).
SR2	Possibility of providing incorrect/inadequate advice to the Minister and directly affected stakeholders/ groups	a) Develop an industry data repository; b) Implement the provisions of the Agricultural Trust Policy; c) Review and approve Research Strategy.
SR3	Non-adherence to the Marketing of Agricultural Product (MAP) Act and its procedures;	a) Resuscitate the working committee between the Department and NAMC.
SR4	The expectation for the NAMC to implement programs or provide support beyond its mandate	a) Facilitate development support for farmers linked with the market. b) Stakeholder engagements (Awareness on namc mandate and defining the roles and responsibilities of the NAMCs mandate.
SR5	Failure to adhere to good governance and poor compliance with relevant prescripts.	a) Review and Approve Ethics and Integrity Policy. b) Awareness of Ethics and other related policies that talk to governance. c) Develop Ethics and Anti-Fraud and Corruption Programmes.

Risk Name	Risk Description	Control Improvement Plan
		d) Implement the approved Ethics and Anti-Fraud and Corruption Programme. e) Engagement sessions with staff on an ethics management programme.
SR6	Spread of the Coronavirus	a) Review and approve the Business Continuity Management Policy. b) Review and approve the Business Continuity Plan. c) Implementation of the Business Continuity Plan. d) Testing of the Business Continuity Plan.
SR7	Budget constraints or limitations in financial resources	a) Explore models for income generation - resource mobilization (Request for increase in the baseline).
SR 8 (New Risk)	Negative Audit Opinion	a) Regular awareness campaigns on NAMC policies and procedures b) Consequence Management c) Implementation of the approved delegation of Authority Framework

5. Public Entities

No Public Entities are reporting to the NAMC.

Name of Public Entity	Mandate	Outcomes
N/A	N/A	N/A



Part D

PART D: Technical Indicator Descriptions (TID)

Outcome 1

Indicator Title	Compliant management and good governance of the entity, throughout the current term of governance.
Definition	To ensure the NAMC functions optimally through effective business processes, corporate governance, and resource support services. The indicator measures the performance of the NAMC in compliance with all applicable policies, legislation, regulations and prescripts
Source of data	Audit Report after the Audit, Quarterly Financial, Human Resources, Communications and ICT Reports and relevant related data.
Method of Calculation / Assessment	A simple count of quarterly reports and 1 x audit report per financial year
Means of verification	Quarterly Financial, Human Resources, Communications and ICT reports. The final Audit Report and opinion are duly signed and stamped by the Auditor General (AG)/AG's office
Assumptions	The NAMC complies with all applicable policies, legislation, regulations and prescripts
Disaggregation of Beneficiaries (where applicable)	The DALRRD as well as the Minister with a focus on the Agricultural sector in South Africa. <ul style="list-style-type: none"> • Target for women: N/A • Target for youth: N/A • Target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: N/A Spatial impact area: N/A
Calculation Type	Cumulative
Reporting Cycle	Quarterly
Desired performance	Quarterly Financial, Human Resources, Communications, ICT Reports and 1 x audit report per financial year
Indicator Responsibility	CEO, CFO, Senior Manager: Human Capital, Risk and Compliance Manager

Outcome 2 (a)

Indicator Title	Approved policy advisory that facilitates the marketing of agricultural products, throughout the term of governance.
Definition	To provide quality research outputs to stakeholders in support of agricultural marketing, trade and policy advisory.
Source of data	Internally produced on secondary data (SARS, STATS SA, SAO and ITC)
Method of Calculation / Assessment	Simple Count of Agricultural Marketing, Trade and Policy Advisory
Means of verification	All Agricultural Marketing, Trade and Policy advisory reports produced.
Assumptions	That all trade, marketing and advisory reports will be submitted, approved and the secondary data is available
Disaggregation of Beneficiaries (where applicable)	The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to structural and spatial transformation priorities: N/A Spatial impact area: N/A
Calculation Type	Cumulative
Reporting Cycle	Quarterly
Desired performance	Trade, marketing and advisory reports will be submitted
Indicator Responsibility	Senior Manager: MERC

Outcome 2 (b)

Indicator Title	Approved statutory measures recommendations submitted to the Minister.
Definition	This refers to the Statutory measures recommendations and report compiled in terms of section 9 of the MAP Act and submitted to the Minister each financial year.
Source of data	Statutory Measures Applications Database of information developed and maintained by the Administrators of statutory measures and Completed questionnaire and audited financial statements.
Method of Calculation / Assessment	Statutory Measures applications and reports submitted to the Minister
Means of verification	Statutory Measures applications and Status of Statutory Measures Report
Assumptions	The information provided in the report is accurate.
Disaggregation of Beneficiaries (where applicable)	The beneficiaries of the statutory measures work are the 18 Agricultural Industries which are utilising statutory measures. The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: Statutory measures and policy advisory will promote agricultural economic growth, create employment opportunities and will promote transformation in the relevant agricultural industries. Spatial impact area: South African Agriculture.
Calculation Type	Cumulative
Reporting Cycle	Quarterly
Desired performance	Statutory Measures applications and 1x Status of Statutory Measures report submitted to the Minister.
Indicator Responsibility	Senior Manager: Statutory Measures Division

Outcome 2 (c)

Indicator Title	NAMC annual reports reflect the transformation of the sector.
Definition	The transformation report is an annual report produced by the NAMC in collaboration with the levy and trusts' administrators outlining the utilisation of the 20% transformation levy as a way to promote and support inclusive growth and competitiveness of the black farmers into the mainstreams of the economy and agricultural value chains. This report is submitted annually to the Minister, portfolio committee and directly affected stakeholders.
Source of data	A structured questionnaire was shared and completed by the levy and trusts administrators. The NAMC's quarterly progress reports on industry transformation support.
Method of Calculation / Assessment	A simple count of 1x Transformation Reports.
Means of verification	Annual transformation report on interventions supported through levies and trusts' funds.
Assumptions	The information in the reports is accurate. The support measures (such as Financial and Development) for smallholder farmers are in existence and accessible The farms are compliant with food safety standards and market requirements The transformation funds are used by the NAMC guidelines on transformation
Disaggregation of Beneficiaries (Where applicable)	The beneficiaries of the trusts' fund and levy transformation expenditure aligned to the trust deed and statutory levy applications. The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: The industry transformation activities will promote agricultural economic growth, create employment opportunities and promote transformation in the relevant agricultural industries in South Africa. Spatial impact area: South African Agriculture
Calculation Type	Non-Cumulative
Reporting Cycle	Annually
Desired performance	1xTransformation report submitted each financial year
Indicator Responsibility	Senior Manager: Agricultural Industry Trusts Division who is the Chairperson of the NAMC's Transformation Review Committee.

Outcome 3 (a)

Indicator Title	NAMC annual reports reflect increased market access
Definition	This is the creation of market access/opportunities for producers/farmers for their agricultural commodities.
Source of data	Documents indicating farmers linked to the markets.
Method of Calculation / Assessment	A simple count of smallholder farmers or projects linked to markets.
Means of verification	Quarterly Reports indicating the number of farmers that are linked to markets
Assumptions	The information in the reports is accurate The support measures (such as Financial and Development) for farmers are in existence and accessible. The farms are compliant with food safety standards and market requirements.
Disaggregation of Beneficiaries (Where applicable)	The beneficiaries of agribusiness development are all farmers who require services. The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: Agribusiness Development will promote agricultural economic growth and rural development. Spatial impact area: South African Agriculture
Calculation Type	Cumulative
Reporting Cycle	Quarterly
Desired performance	Increased number of smallholder farmers accessing new and/or existing market opportunities
Indicator Responsibility	Senior Manager: Agribusiness Development Division

Outcome 3 (b)

Indicator Title	NAMC annual reports reflect increased export growth of agricultural products
Definition	This refers to reports that detail the performance of agricultural products in export markets.
Source of data	Secondary data was obtained from the South African Union of Food Markets (SAUFM) and interactions with stakeholders.
Method of Calculation / Assessment	Simple Count of twelve (12x) Smallholder Market Access Estimates (SMAE) reports
Means of verification	Smallholder Market Access Estimate (SMAE) report
Assumptions	The secondary data is available The information in the reports is accurate The report is approved
Disaggregation of Beneficiaries (were applicable)	The target for women: N/A The target for youth: N/A The target for people with disabilities: N/A
Spatial Transformation (Where applicable)	Contribution to spatial transformation priorities: N/A Spatial impact area: South African Agriculture N/A
Calculation Type	Non-Cumulative
Reporting Cycle	Monthly
Desired performance	Smallholder Market Access Estimates (SMAE) reports submitted.
Indicator Responsibility	Senior Manager: MERC