

Chapter 6

Towards an Institutional Framework for Managing Agricultural Export Trade Promotion *

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Introduction

The Growth, Employment and Redistribution (GEAR) strategy, South Africa's macro-economic framework, argues that as South Africa moves into the 21st century, it must seek:

- a competitive fast-growing economy that creates sufficient jobs for all work seekers
- a redistribution of income and opportunities in favour of the poor
- a society in which sound health, household, food, security and the related services are available to all
- an environment that reinforces national security
- an agricultural trade policy that is geared at boosting South Africa

The stagnation that characterised the 1980s has come to an end with the successful democratic transition in South Africa. However, the new government has inherited an agricultural policy framework that encourages production for the domestic market, rather than for the domestic as well as the international market. This results in insulation from international competition, which insulation restrains incentives to improve efficiency and distorts measures to achieve comparative advantages. Sus-

* This chapter was written between 1998 and 1999 and does not take into account the changes that have taken place after that period.

tained growth in agricultural trade therefore requires a transformation towards a competitive outward-oriented policy.

The word most frequently used to describe trends in world trade over the past decades is “globalisation”. While the extent of globalisation is sometimes exaggerated, there is no question that the world economy has become increasingly integrated. Trends in world trade are important to South Africa for two reasons:

- As guideline for adaptations so as to optimise possibilities for trade
- As a means to raise the viability of South Africa’s agricultural trade policy in the world trading environment

This chapter presents the findings of an assessment of institutional arrangements regarding international trade in general and agricultural trade promotion in particular. The chapter was originally written to provide technical information to the Agricultural Trade Policy Drafting Team in early 1998 in order for them to design an institutional framework for managing trade.

Evaluation questions

In order to review the institutional arrangements necessary for the promotion of agricultural trade, the following set of evaluation questions were formulated:

- Which government departments are involved in trade and what are their specific responsibilities in terms of legislation?
- How effective and efficient are these departments in the promotion of trade, especially agricultural trade?
- What are the roles of other institutions such as the Perishable Products Export Control Board, the Agricultural Research Council, Outspan, UNIFRUCO and SAFTO in agricultural trade policy implementation?
- Are there overlaps or gaps in the promotion of export trade?

Methodology

In order to explore these questions, two sources of information were used. First, secondary information was collated from various government departments and non-governmental institutions. This information was gleaned from various policy documents such as Green and White Papers from relevant government departments, and annual reports of various government departments and non-governmental institutions. Written submissions were also received from some institutions.

Primary information was obtained during face-to-face interviews with various stakeholder representatives. Where such interviews were impossible due to either time or distance constraints, telephonic interviews were arranged. The duration of the study imposed some handicaps, as some important representatives were unavailable at crucial times during the study. However, in such instances published and unpublished reports from secondary sources were utilised.

Structure of the chapter

This chapter is divided into four main sections. Section one (above) is an introduction, outlining the terms of reference and key questions for evaluation. The methods used in compiling this report are also outlined in the first section. The second section provides a broad outline of government departments involved in international trade and defines their specific responsibilities. It also looks in details at their directorates involved in trade and their effectiveness, efficiency and economics. The third section articulates the roles of non-governmental organisations or independent agencies involved in agricultural trade policy implementation. Section four identifies areas of overlap and gaps in the co-ordination of international trade promotion.

Overview of departments involved in trade in South Africa

This section provides an overview of government departments involved in the promotion of export trade, namely the departments of Agriculture; Arts, Culture, Science and Technology; Finance (Revenues and Customs); Foreign Affairs; and Trade and Industry.

Department of Agriculture

The activities of the Department of Agriculture is guided by a policy and legal framework, steered by a chief directorate, and informed by inputs from a marketing council and a trade forum.

Agricultural policy, legislation and departmental reform

In terms of the Constitution, agriculture is a concurrent provincial and national function (section 126(3) of the interim Constitution). The 1995 *White Paper on Agriculture* envisioned agriculture as follows:

A highly efficient and economically viable market-directed farming sector, characterised by a wide range of farm sizes, which will be regarded as the economic and social pivot of rural South Africa and which will influence the rest of the economy and society.

The White Paper also provided the following mission statement:

Ensure equitable access to agriculture and promote the contribution of agriculture to the development of all communities, society at large and the national economy in order to enhance income, food security, employment and quality of life in a sustainable manner.

In terms of trade promotion, two pieces of legislation are important. The first one is the Marketing Act (No. 59 of 1968). This Act provided for the introduction of a system of control over the marketing of agricultural products and regulated qualitative control over the import or export of

these products. The Directorate of Marketing Administration was responsible for the enforcement of this Act.

The White Paper suggested that government should intervene in agriculture marketing to ensure that export marketing arrangements enhance the welfare of the nation as a whole. The White Paper also acknowledged that a country's comparative advantage in the production and marketing of an agricultural product or commodity could greatly benefit that country if exports can be maximised through the multiplier and linkage effects of agriculture. The White Paper further indicated that many countries use statutory measures and export subsidies to enhance their agricultural export performance. The White Paper recommended "single desk export marketing arrangements". The stated mission of the national Department of Agriculture is to:

[e]nsure access to agriculture and promote the contribution of agriculture to the development of all communities, society at large and the national economy, in order to enhance income, food security, employment and quality of life in a sustainable manner.

The White Paper, based on wide consultation, focused on national and household food security; income and employment generation; and sustained animal and plant health. Out of 26 acts for which the Department of Agriculture is responsible, six have been amended in line with the above objectives. The agricultural markets have been liberalised and access to them broadened through legislation and a transformed National Agricultural Marketing Council that is representative of all groups, including small farmers and labour tenants.

Chief Directorate: Economics and Marketing

This directorate consists of the following sub-directorates: Co-operatives, Agricultural Economics and Marketing, Marketing Policy and Marketing Administration. The External Economic Relations Sub-directorate is involved in renegotiations with the Southern African Customs Union (SACU), attends meetings of the SADC, implements the General Agree-

ment on Tariffs and Trade (GATT), which was signed by South Africa in 1991, and negotiates with the European Union on a possible free-trade agreement. In addition, officials of the sub-directorate represent the Department of Agriculture on the inter-governmental workshops concerned with SA-EU relations and on the NEDLAC Technical Committee (SA-EU negotiations).

- **Marketing policy**

Following the finalisation of the *White Paper on Agriculture*, special emphasis was placed on broadening access to emerging and previously disadvantaged farmers. The Marketing Policy sub-directorate mainly focuses on the Broadening Access To Agriculture Thrust (BATAT). The BATAT marketing drive business plan explains the steps necessary to improve market access for emerging and previously disadvantaged farmers in South Africa.

Three strategies were adopted to make BATAT effective. The first strategy was twinning, where use is made of the perspectives, experience and expertise of people inside and outside the government and public service. The second strategy is the exposure of farmers, technical persons within the Department of Agriculture and decision makers to smallholder farming outside South Africa. The third strategy entails the communication of matters of concern to smallholding and medium-holding farmers.

- **Marketing administration**

This sub-directorate is mainly responsible for administrative tasks related to the application of the Marketing Act. The tasks include the preparation of subsidies arising from recommendations made by the National Agricultural Marketing Council and submitted to the minister for approval. The application of control measures concerning the importing and exporting of agricultural products, including the loaning of permits on behalf of the Director-General of Agriculture, is also the responsibility of this sub-directorate. The sub-directorate is also responsible for ensuring compliance with commitments to the World Trade Organisation.

National Agricultural Marketing Council

The National Agricultural Marketing Council (NAMC) is a statutory body established in terms of section 3 of the Marketing Agricultural Products Act (No. 47 of 1996). The Act's main objective is minimum market intervention. Statutory measures will only be implemented if sufficient support among directly affected parties can be proved. The objectives of the 1996 Act are as follows:

- increasing market access for all market participants
- promoting efficient marketing of agricultural products
- optimising export earnings from agricultural products
- enhancing the viability of the agricultural sector

Until recently, the 1968 Marketing Act did not benefit emerging and small-scale farmers. The new Marketing of Agricultural Products Act is an attempt to empower these farmers in order to mobilise themselves, participate in policy formulation, formulate strategies and control processes relating to their operations. The stated objective is to broaden access of farmers to support services such as credit, extension, marketing, training, input supply and farming infrastructure.

The new Marketing Act of 1996 stipulates that all the marketing boards should be phased out within a year after the first meeting of the new NAMC. These boards as well as organisations established under the 1996 Marketing Act submitted business plans to the NAMC for the minister's approval, setting out the procedures, time frames, budgets and other aspects regarding the phasing out of the boards and organisations. The NAMC is currently evaluating these plans and will see to it that all directly affected groups are consulted in the process.

The role and functions of the NAMC are to:

- investigate the establishment, consultation, amendment or revocation of statutory measures affecting the marketing of agricultural products, evaluate the desirability, necessity or efficiency and, if necessary, propose alternatives to the establishment, continuation, amendment or repeal of a statutory measure and report and advise accordingly

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- prepare and submit to the minister recommendations regarding statutory measures and changes to such measures in order for the minister to direct further action
- report on its activities
- direct any institution or body of persons designed for the purpose of the implementation or administration of a statutory body to furnish the council with information pertaining to a statutory measure
- undertake investigation and advise the minister regarding:
 - agricultural marketing policy and the application thereof
 - the co-ordination of agricultural marketing policy in relation to national economic, social and development policies as well as international trends and development
 - the possibilities for promotion of the Act
 - monitoring the application of statutory measures, report thereon to the minister, and evaluate and review such measures at least every two years

The NAMC consists of ten members with practical knowledge and experience of one of the following:

- the commercial production of agricultural products
- agricultural product-related trade and industry
- agricultural economics, including agricultural marketing and international agricultural trade
- consumer issues relating to agricultural products, including issues relating to the previously disadvantaged communities
- the production and marketing of agricultural products by small-scale and previously disadvantaged farmers

Based on the analysis above, one may suggest that the NAMC has also been given the task of agricultural trade promotion. It appears that, so far, the NAMC has been focusing on internal trade promotion and not agricultural export promotion. There is a need to clarify the roles and responsi-

bilities of the NAMC and the Agricultural Trade Forum (and other institutions involved in agricultural trade). This clarification is likely to enhance understanding of the responsibilities and accountability of each institution.

Agricultural Trade Forum

The origins of the Agricultural Trade Forum (ATF) date back to 1995 when the SA-EU negotiations started. At the time the SA-EU Agricultural Committee was established and largely represented commercial interests. The purpose of the committee was to serve as a link between industry and government during the negotiations. In November 1996 the ATF was established. Different interest groups (consumers, trade unions, emerging farmers and commercial farmers) and government departments (Foreign Affairs, Trade and Industry, Agriculture) are represented in the ATF. Meetings are scheduled around important events.

The ATF creates an opportunity to give feedback on what is currently happening in the agricultural trade environment. It also acts as a platform to collate and share information through an interactive process. Members of the ATF also get an opportunity to give input to policy formulation. Often members would be requested to comment on national and international agricultural trade issues either by fax or phone. However, it appears that participation by trade unions and consumer representatives is hampered by lack of organisational capacity, expertise, time and resources. It may be important for the Department of Agriculture to consider providing some support (albeit limited) in order to ensure that emerging farmers and trade unions participate effectively in the work programme of the ATF.

Department of Arts, Culture, Science and Technology

The Department of Arts, Culture, Science and Technology (DACST) was established in 1994. The DACST was charged with promoting and preserving South Africa's arts and cultural heritage and enhancing the country's scientific research and technological capabilities in line with the government's Reconstruction and Development Programme and the

Growth, Employment and Redistribution (GEAR) strategy. The stated mission of the DACST is:

[t]o realise the full potential of arts, culture, science and technology in social and economic development, in nurturing creativity in innovation, and promoting the diverse heritage of our nation.

All science councils in South Africa, including the Agricultural Research Council (ARC), are the political and financial responsibility of the DACST. However, the Department of Agriculture mainly determines the content of agricultural research programmes.

The *White Paper on Science and Technology* adopted by cabinet initiated three processes: the investigation of science and technology institutions; the creation of an accountability framework for science councils; and the establishment of an innovation fund for the competitive allocation of research funds.

The National Research Foundation (NRF), an umbrella grant-funding body, will develop national research capacity, and the National Advisory Council on Innovation will provide government with science and technology advice. Other science and technology initiatives include a stock-taking survey of the strengths of the research system; an assessment of the brain drain; a research and technology foresight exercise; building human resources and promoting public awareness of science and technology; and promoting international co-operation. (Seven bilateral and six general agreements have already been signed; and consultation is in progress on agreements with 36 other countries.)

The ARC and all its institutes have been through peer evaluation commissioned by the DACST. These evaluations identified strengths and weaknesses within the ARC and suggested ways to re-align the ARC's vision, mission and strategic objectives to the national government's programme of societal transformation.

Department of Finance

Under this section attention is given to the role and responsibilities of the Department of Finance, revenue collections the department's assumption of RDP functions.

Role and responsibilities

The mission of the Department of Finance is to be a leading agency in the integration and co-ordination of economic policy, in social development and in fiscal planning. In addition, the Department of Finance commits itself to promoting sound public finances and to implement a macro-economic strategy for Growth, Employment and Redistribution (GEAR). On 1 April 1996 the South African Revenue Service was established, integrating Inland Revenue and Customs and Excise into one body. Although the South African Revenue Service was given administrative autonomy in October 1997, the Minister of Finance is politically accountable for it.

Revenue collections

Since 1994, the expansion of the tax base has been a high priority. The restructuring of the South African Revenue Service from Customs and Excise and Inland Revenue was completed by April 1996. The tax relief campaign was expected to draw in many more taxpayers. There have been major breakthroughs in cracking smuggling syndicates. However, the systems that have been put in place are not yet adequate to ensure efficient collection of revenue and duties. Key problems identified within the South African Revenue Service include lack of skilled personnel and lack of adequate information systems to capture information. In addition, it appears that there is limited co-ordination between various key government agencies, for example between the Department of Agriculture, the Department of Trade and Industry and the South African Revenue Service in terms of tariffs and custom duties.

Department of Finance's assumption of RDP functions

A new chief directorate has been created in the Department of Finance to deal with all development finance, and progress has been made in setting up systems for the management of resources. A major audit has clarified the administrative situation at the time when RDP funds were transferred. Capacity is being developed in the Department of Finance, the Department of State Expenditure and the restructured South African Revenue Service to establish the skills necessary to meet the challenges of creative development finance.

Department of Foreign Affairs

This section takes a look at the mandates of the Department of Foreign Affairs and the multilateral relations it is engaged in.

Mandates of the Department of Foreign Affairs

The stated mission of the Department of Foreign Affairs is to develop a foreign policy for South Africa that will promote mutually beneficial diplomatic and economic relations with other countries within the context of the globalising world. Through its trade and diplomatic missions and consulates abroad, the Department of Foreign Affairs promotes the economic, political and social wellbeing of South Africa. After South Africa was re-admitted into the international arena, several missions were established and a number of political, economic, scientific, social and security organisations provided a platform for South Africa to participate and make a contribution in those world forums.

The development of South Africa's regional relations is considered a cornerstone of policy. It takes place within a framework of co-operation with Southern African countries approved by cabinet. South Africa became chair of the Southern African Development Community (SADC) in September 1996. Economic ties with other African countries are being encouraged. South Africa has been participating in international efforts to end internal conflicts in other African countries within the framework of the Organisation of African Unity.

Multilateral relations

South Africa has been active in the United Nations, supporting reform in line with the views of the Organisation of African Unity and the SADC; in the Commonwealth; and in the non-aligned movement. South Africa's role in arms control has grown through membership of the Conference on Disarmament and South Africa's participation in the Pelindaba and Comprehensive Nuclear Test Ban treaties. The country is active in specialised United Nations agencies. Participation in UNCTAD, whose ninth conference we hosted, has sharpened focus on programmes for the least developed countries. South Africa has ratified conventions on the rights of women, children and refugees and is a member of the UN Human Rights Commission.

Although the Department of Foreign Affairs is represented in the ATF, it appears that very few experts who have agricultural academic background are attached to trade missions. Even within the Department of Foreign Affairs head office there are few dedicated officials focusing on agricultural trade. The multilateral directorate is focused on facilitating interaction with UN and other agencies and not necessarily on trade promotion.

Department of Trade and Industry*

This section scrutinises the mandate of the Department of Trade and Industry, external trade relations, the Chief Directorate: Foreign Trade Promotion, Chief Directorate: Industrial Promotion, the Board on Tariffs and Trade, the Global Economic Strategy Project and emerging themes and issues.

Mandate of the department

The stated mandate of the Department of Trade and Industry (DTI) is to promote economic development especially in the manufacturing sector.

* The Department of Trade and Industry has been restructured since this chapter was written. This chapter does not take into account changes after 1999.

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The goal of the DTI is to ensure adaptability and competitiveness in South Africa's industrial base. Extensive research and analysis, organised around "cluster" studies that identify actions to improve competitiveness and employment creation within particular clusters of industries, inform the strategy. Supply-side measures are being designed and implemented to promote productivity and competitiveness.

One of the biggest programmes is the development of small, medium and micro enterprises (SMMEs). The approach is to create a supportive environment for the sector, and several institutions have been created to this end. Spatial development initiatives (SDIs) play a crucial role in South Africa's industrial strategy, from the cross-border Maputo Development Corridor to internal regional and metropolitan initiatives. The Maputo Development Corridor process is on track, and its promotion company started to work early in 1997.

A policy package has been developed within the ambit of the Reconstruction and Development Programme (RDP) and the Growth, Employment and Redistribution (GEAR) strategy. This means the promotion of trade relations in a globalising world economy; an industrial strategy for productivity and competitiveness; and equitable trade and commercial practices that will promote trade and investment and foster opportunities for greater participation in the economy.

External trade relations

The managed reduction of South Africa's tariffs over a five-year period (with slightly longer periods for the automobile, clothing and textile industries) is on track. As far as the region goes, agreement on the review of the South African Customs Union was to have been reached in 1998. The detail of tariff reduction was de-linked from issues relating to the basic framework for an SADC Free Trade Agreement. This facilitated the signing in 1996 of a protocol for an SADC Free Trade Agreement and a commitment to addressing the tariff phase during 1997 and 1998. South Africa has responsibility for the SADC finance and investment sector. Issues and tensions around South Africa's bilateral relations with some

SADC countries—in particular Zimbabwe, Zambia, Malawi and Mozambique—are being addressed.

Trade negotiations with the European Union have been protracted and problematic. More formal negotiations began in January 1997. Trade promotion and investment promotion are increasingly important parts of the DTI's work as new markets open up to South Africa. Major South African delegations have visited several regions, including Europe, the Middle East and Gulf states, Australia and Asia. The launch of Investment SA in February 1997, as a one-stop investment centre, will hopefully facilitate investment decisions by foreign investors.

Chief Directorate: Foreign Trade Promotion

The objective of this directorate is to promote and expand South Africa's foreign trade and to administer the financial assistance schemes for exporters. The DTI's economic assistants abroad identify marketing opportunities that have the greatest potential for products in respect of which South Africa has a competitive, comparative or technological advantage. Occasional seminars are organised, and economic representatives stationed in key missions introduce foreign marketing opportunities. Activities to promote international trade include: primary export market research, exhibitions, trade fairs, publications such as the *South African product digest*, and the President's Award for Export Achievement.

The directorate indicated its commitment to improving efficiency through:

- identification and prioritisation of sectors/clusters/niche markets
- development of sector-specific export strategies in consultation with other role players
- prioritisation of international markets
- extension of the concept of cross-cutting task forces consisting of all players, both private and public, to select markets, led by the minister or the director-general

Chief Directorate: Industrial Promotion

The key objective of this directorate is to enhance the competitiveness of the agricultural and agro-business industries in line with the Reconstruction and Development Programme and agricultural policy. The secondary objectives are to:

- develop systems and monitor the sectors and industrial trade
- investigate applications of customs tariff policy
- establish an effective communication network
- contribute to tariff and other policy formulations
- identify threats and opportunities
- participate in cluster studies related to the industries that fall within the ambit of the Directorate of Agro-Processing Industries

During 1995 this directorate was responsible for the introduction of customs tariffs on agricultural products after the Marrakesh Agreement was signed in December 1994. Customs tariffs replaced the traditional quantitative control on the basis of import permits. Government has implemented most of the recommendations of the Board on Tariffs and Trade (BTT) and import control has already been lifted on a vast number of agricultural products.

Board on Tariffs and Trade (BTT)

The BTT is responsible for the processing of applications relevant to the administration of the Customs and Excise Act, 1964. For example, in terms of this Act, the government is empowered to impose a number of customs duties on imported goods. The charging of customs duties is influenced by two acts in particular, namely the Board on Tariffs and Trade Act and the Customs and Excise Act, 1964. Five sections of the Customs and Excise Act are relevant to the work of the directorate:

- Schedule 1: ordinary customs and excise duties, ad valorem customs and excise duties, sales duties and surcharges

- Schedule 2: anti-dumping and countervailing duties on imported goods
- Schedule 3: industrial rebates of customs duties
- Schedule 4: general rebates of customs duties
- Schedule 5: specific drawbacks and refunds of excise duties

The Board on Tariff and Trade Act makes provision for the state president to appoint members of the BTT. The objectives of the BTT are:

[t]o promote industrial growth within the framework of the economic policy of the Republic of South Africa by conducting investigations into any matter which affects or may affect the trade and industry of the Republic or the common customs area of the South African Customs Union, and to advise the Minister in this regard. The Board on Tariffs and Trade's advice and the reasons are contained in reports that are made available to all interested parties and are tabled in Parliament.

The Customs and Excise Act provides, amongst other things, that the Minister of Finance should amend customs duties at the request of the Minister of Trade and Industry. Such amendments, including the advice of the BTT and the decisions of the Minister of Trade and Industry, must comply with the technical requirements that apply with regard to the customs tariff. These requirements arise to a significant extent from the international Convention on the "Harmonised System". South Africa is also a contracting party to the convention, which determines the system according to which products must be classified for customs tariff purposes. With the commencement of the large-scale conversion of import control on agricultural products to customs duties, it was agreed that the BTT should submit copies of its reports and recommendations to the Minister of Agriculture to enable the Minister of Trade and Industry to consider the BTT's recommendations in the light of the opinion of the Minister of Agriculture.

The charging of customs duties by South Africa is affected by international trade agreements. The most important of these agreements are the

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Marrakesh Agreement, the Southern African Customs Union Agreement and agreements with Zimbabwe and Malawi.

In the past, protection was given to agricultural products through so-called quantitative import control. Nevertheless, there were agricultural products, such as sugar, that had been protected against imports by customs tariffs for a number of years. In recent years, quantitative import controls on certain agricultural products such as meat have been replaced by customs tariffs.

The Marrakesh Agreement requires, amongst other things, that ordinary customs duties should not exceed certain limits. These levels are, as far as agricultural products are concerned, generally considerably higher than the levels applicable to industrial products. Due to limited time available for replacing import control with customs tariffs and owing to the large number of products involved, the BTT has not been able to do in-depth investigations/studies. Consequently, the BTT recommended protection according to the general guideline that customs duty should result in domestic production and consumption, more or less the same as was the case under import control.

Global Economic Strategy Project

The DTI recognises that the development of international competitiveness is no easy task and that government should do all it can to provide an effective enabling environment. This can range from the provision of various incentives to useful strategic tools. The Global Economic Strategy Project falls within the latter category. It is primarily an analytical tool for conceptualising and prioritising South Africa's foreign economic relations. The project aims at:

- Developing a policy tool that would act as a basis for determining the allocation of DTI foreign offices and domestic marketing resources. This is done according to an assessment of the trade (and to some extent inward investment) potential for South Africa across a range of markets.

- Creating a framework that takes into consideration some of the important but less tangible quantitative factors that play a role in prioritising countries with which South Africa should foster economic relations.
- Beginning a process whereby government and its social partners work together to identify markets and sectors that hold the greatest potential for enhancing South Africa's economic performance in the global economy.

Emerging themes and issues

It appears that the DTI's focus in agricultural trade promotion is not on primary agricultural produce. The focus is largely on manufacturing and industrial trade promotion. The DTI's agro-processing trade promotion directorate appears to lack skilled personnel to promote agricultural trade. In addition, several independent channels of communication between the DTI and the national Department of Agriculture allegedly create confusion and delays in co-ordinating different aspects of trade policy. Capacity appears to be located within the private sector, whose international marketing strategies appear to have succeeded.

Role of other institutions in agricultural trade promotion

This section outlines the role of various institutions in the promotion of agricultural trade. The institutions reviewed include the Perishable Products Export Control Board (PPECB), relevant institutes of the Agricultural Research Council, Outspan, UNIFRUCO and the South African Foreign Trade Organisation.

Perishable Products Export Control Board

The PPECB is an independent supplier of statutory quality assurance, research, development and logistical services, adding value to the products of perishable and other food producers in South Africa. The PPECB's

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mission is to ensure systematic and efficient logistics for export. Its objectives are as follows:

- Impartial verification that export products comply with specific standards
- Ensuring that standards are mentioned during handling, storage and transport
- Co-ordinating the logistics of product exports to ensure optimum use of available resources
- Providing a technical support service

The stated goals of the PPECB are:

- Market focus: Serve clients with value-adding services
- Business focus: Provide modern structure and business practices
- Human resource focus: Optimally manage and develop HR as core
- Financial focus: Ensure sound corporate governance principles
- Transformation focus: Review and refine, aligned with stakeholders

The PPECB was established in 1926 (under Act No. 53 of 1926), when it superseded the “Vruchten Uitvoer Kontrole Raad” that had been established to allocate the available space on vessels between citrus and deciduous fruit exporters. It soon became clear, however, that various other exporters of perishable products, specifically meat, eggs and dairy products, also required suitable space aboard vessels, as well as expert knowledge on stowage patterns and temperature control.

The 1926 Act (No. 53), which established the PPECB, provided for a body which would ensure that all exporters received a fair allocation of shipping space, would formulate temperature regimes and treatments for various products, and would ensure that these were applied throughout the transport chain to overseas markets.

The PPECB was the first board to be privatised with the promulgation of Act No. 9 of 1983, following an extensive investigation by the Commission for Administration. The functions of the PPECB are to control the shipment of perishable products from all ports in the Republic by:

- determining which ships are suitable for the conveyance of perishable products and the class of accommodation to which any perishable product shall be assigned
- calling for and receiving from intending exporters of perishable products estimates and other particulars of their intended exports
- calling for and receiving from shipowners or their representatives information on the amount of space suitable for the conveyance of perishable products available on any ship appointed to call at any port in the Republic
- making enquiries, negotiating and contracting or otherwise arranging for the provision of such port facilities and shipping space for the handling and conveyance of perishable products as may be deemed necessary by the PPECB
- causing to be diverted, when the PPECB deems it necessary, perishable products to such ports of shipment as in the opinion of the PPECB are most suitable
- making investigations regarding conveyance and cold storage requirements for perishable products and making recommendations thereon to the South African Transport Services, any other department of state or any interested person
- making recommendations on the handling perishable products with due allowance for particular perishable products, ports of export and means of conveyance

The PPECB is constituted as follows in Act No. 9 of 1983 section 4 (1) and (2):

- Six persons of whom each shall represent one of the six largest export groups, determined on the basis of average annual export volume as ascertained by the PPECB over the consecutive five years immediately preceding the year in which each person is appointed as a member.

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- One additional person to represent each export group of which the average export volume so ascertained, exceeds 20% of the total annual export volumes of all perishable products.
- One person, nominated by the South African Agricultural Union, to represent exporters not represented in terms of the above.
- One person appointed by the minister on the commendation of the PPECB on such conditions and for such a period as s/he may determine for a particular purpose.

The Minister of Agriculture decided to delegate the function of export quality inspection of agricultural products to the PPECB in terms of Act No. 119 of 1990. The origins of the inspection service can be traced to 1899, when the Cape government was requested to appoint an official in Cape Town harbour to examine and approve cartons of export fruit. The first official was appointed in 1904, and inspection regulations were drafted. At that stage exporters participated in the scheme on a voluntary basis, but after the establishment of the Union of South Africa in 1910, the Fruit Export Act (No. 1) was promulgated in 1914, which made inspections of export fruit compulsory. Since that date South Africa has earned the enviable reputation as the most consistent supplier of quality agricultural produce in the world.

The shipment statistics below show the export proportion per state/region inspected by the PPECB in 1996:

| | |
|----------------|--------|
| Europe | 49,11% |
| Far East | 6,08% |
| United Kingdom | 20,66% |
| Mediterranean | 1,16% |
| United States | 3,98% |
| Australia | 1,13% |
| Other | 17,88% |

The PPECB fulfils an important function—ensuring product quality by impartially verifying that South African agricultural products conform to specific standards. Almost 2 000 billion units are inspected prior to export

annually, to ensure that they conform to the prescribed grading, packing and marking requirements of importing countries all over the world. The PPECB keeps an eye over exports that are now worth nearly R7 billion and require over 3 million cubic metres of space in ships, planes, trains and road transport every year. More than 856 000 people are employed in industries that produce those exports.

The dawn of democracy in South Africa has led to the opening of new and potential markets. It appears that the PPECB is playing a valuable role. Closer assessments of its workings might assist in ensuring that South Africa continues to export agricultural products of high quality.

Agricultural Research Council

The Agricultural Research Council (ARC) of South Africa was established on 1 April 1992. Through its institutes, capacity has been built over generations, some dating back to the turn of the century. Other institutes are young and rapidly acquiring experience. The ARC comprises some 16 institutes, most being organised to serve the interests of a specific group of commodities. However, four institutes are not linked to specific commodities. The objectives of the ARC are to focus on:

- Science capacity building in order to ensure that the full spectrum of technology needs of the entire agricultural sector and related sectors are addressed effectively.
- Technology required to ensure a competitive advantage on the local and international markets for the South African agricultural sector through optimising exports and import replacement.
- Technology required to specifically enhance the social welfare of the people.

Of particular relevance to our brief here are the following institutes: ARC - Infruitec, ARC-Nietvoorbij and ARC-Institute for Agricultural Engineering (ARC-IAE).

ARC-Fruit, Vine and Wine Research Institute

In 1997, the institutes of Nietvoorbij and Infruitec were amalgamated to form the new ARC-Fruit, Vine and Wine Research Institute. Historically, ARC-Infruitec concerned itself with research as well as the development of technology for deciduous fruit, nuts and alternative crops grown in temperate climates. On the other hand, ARC-Nietvoorbij was concerned with research, technology development and technology transfer, and served the wine, brandy, grape juice, table grape and raisin grape industries in South Africa. The vine and wine industries have a turnover of approximately R1,8 billion per annum and provide an income to approximately 120 000 people. The role of the new institute is to focus on research, technology development and technology transfer. The objectives of the new institute (ARC-Fruit, Vine and Wine Research Institute) are to:

- Give producers competitive international markets, for example by supplying them with new cultivars, protocols for integrated fruit production and technologies to lower input cost.
- Support South African producers to supply products at the right price, at the right time and at the preferred quality for expanding international consumption.
- Develop and supply technology that will allow the maximum number of producers to share in the benefits of international trade.

The following are critical problems facing the fruit, vine and wine industries:

- Shortage of irrigation water and more specifically good quality water
- High production costs
- Physical and chemical constraints inherent in South African soils; also the limitations imposed on replanting old orchard soil by specific replant diseases
- Inadequate development of environment-friendly production practices
- Shortage of cultivars with desirable characteristics and adaptability

- Shortcomings in production quality that negatively affect the competitiveness of the product
- Inadequacies in the availability of information, user-friendly information packaging and its application

There is collaboration with at least four other ARC institutes. The collaboration with the University of Stellenbosch extends to its departments of Soil and Agricultural Water Science, Genetics, Agronomy, Microbiology, Plant Pathology as well as Food Science. The ARC also collaborates with the University of Natal, the University of the Free State and the Medical Research Council and with the United States Department of Agriculture (USDA). The nature of the collaboration is as follows:

- Where the institute does not have the necessary expertise for part of a research project, the expertise is co-opted from another research body, as happened in the case of the development of ELIZA for grapevine virus diseases by ARC-PPRI and the meteorological studies by ARC-ISCW.
- Collaboration emanating from bilateral agreements between countries. Currently such collaboration exists between the Department of Post-Harvest Biology and the USDA on the biological control of post-harvest diseases.
- Collaboration emanating from bilateral agreements between research bodies, e.g. Infruitec and the International Atomic Agency on the development of transgenic apple plants, as well as on a pilot study on fruit fly. Nietvoorbij and Israel are, for instance, co-operating on biotechnological techniques related to seedlessness in grapes.

In brief, ARC-Infruitec/Nietvoorbij is, on a national basis, responsible for all research concerning the cultivation and post-harvest technology of deciduous fruit and other assigned crops (berry fruit, nut crops, rooibos tea, dates, olives, kiwi fruit and hops). The institute renders specialised advice to the relevant industries concerned with local and export marketing. The institute's research makes a valuable contribution to the viticulture and wine industries of Southern Africa. Research is done on the

cultivation of table, raisin and wine grapes, as well as on the production of wine and brandy. The research is aimed at the formulation of principles and techniques, which in the long term will ensure optimum yield and quality at economic prices.

ARC-Institute for Agricultural Engineering

The second ARC institute, which has an indirect bearing on agricultural trade promotion, is the ARC Institute for Agricultural Engineering. The Division of Agricultural Engineering was established by the Department of Agricultural Technical Services in 1961. In 1995 the Institute for Agricultural Engineering was restructured and transferred to the ARC. As part of the ARC, the ARC-IAE is to perform technology engineering, development, technology transfer and the evaluation and testing of equipment and systems for sub-Saharan conditions as directed through the functions, powers and duties of the Agriculture Research Act (Act No. 86 of 1990). Through these actions an important contribution is made to the national strategic vision for South Africa by:

- increasing the knowledge base within the agricultural sector as part of investment in people
- improving infrastructure
- ensuring economical, sustainable agricultural production
- improving the profitability of agriculture in order to improve the quality of life of all South Africans

The stated vision of the ARC-IAE is:

to significantly contribute to the improvement of quality of life and thereby [to be] recognised worldwide for its expertise in the field of agricultural engineering.

The stated mission of the ARC-IAE endorses its role in contributing to the improvement of life:

The ARC-Institute for Agricultural Engineering is committed to delivering sustainable and cost-effective engineering techno-

logy to agriculture and related sectors in such a manner that value is added for all concerned.

In order to achieve its stated vision and mission, the institute identified nine strategies to contribute to improving quality of life:

- irrigation technology
- crop production mechanisation
- animal housing engineering
- agricultural resource conservation
- agricultural product processing
- storage, farm structures and facilities
- renewable energy technology
- climate-controlled structures
- rural engineering

The restructured national Department of Agriculture was tasked with the promotion of agricultural technology development and transfer including agricultural engineering technology. Both the national Department of Agriculture and the nine provincial departments of agriculture are responsible through an agreement between the national Department of Agriculture and the ARC for promoting and directing agricultural technology research and development.

The ARC-IAE obtains its income from the parliamentary grant allocated to the ARC, as well as from external sources. In brief, the ARC-IAE is active in agricultural mechanisation, farm structures, irrigation, resource conservation, energy, agriculture and product processing. Research is done for all farmers, from the smallest subsistence farmer employing animal traction, to the most sophisticated farmer using advanced equipment. Through research, technology development and testing, information, materials and equipment are made available to satisfy needs in the agricultural engineering field.

Role of the ARC in agricultural trade promotion

The ARC is not directly involved in agricultural trade promotion. However, the ARC as a statutory body receives grants from government and the private sector to conduct research and generate technology for agricultural producers to ensure that they are able to compete both locally and internationally. The ARC plays a co-ordination role. Indeed, the ARC ensures that several of its research institutes collaborate on common programmes and projects. There is a channel of communication between the ARC and the national Department of Agriculture.

The memorandum of agreement between the government and the ARC states the following:

The ARC undertakes to conduct research and technology development and to render services in the entire recognised field of Agricultural Engineering on behalf of the National Department of Agriculture and the various provincial departments of agriculture. This service will be rendered free of charge up to the maximum of 60% of the baseline allocation of the Research Institute. The baseline allocation represents the full capacity to perform a research and technology development service and provides manpower costs, capital costs and overhead costs based on the 1995/96 financial year. To the extent that the baseline allocation is increased or decreased in real terms as jointly determined by the Department and the ARC, the extent of the service which will be available free of charge will increase or decrease proportionally. Any additional research required will be done at full standard commercial rates determined by the ARC. The ARC undertakes to maintain and extend the research capacity of the Institute by employing 40% of the baseline allocation for this purpose. To the extent that the baseline allocation increased or decreased in real terms as jointly determined by the Department and the ARC, the building and maintenance of capacity may be increased or decreased proportionally.

Apart from the memorandum of understanding between government and the ARC, there is a memorandum of understanding between the CSIR and the ARC. The former focuses on research and technology related to food processing, while the latter focuses on food production. The ARC has attachés in three of South Africa's consulates abroad. Their role is to relay agricultural messages through seminars, exhibitions and talks abroad.

The ARC is developing a training programme that could be delivered to delegates from other African countries. It is hoped that this will transfer skills and export agricultural technology. It has potential to earn South Africa some additional foreign currency.

Outspan South Africa

One of South Africa's most successful international export and marketing companies is Outspan. Outspan South Africa is a private company with international connections, especially with Fisher Bro. Sales Inc. (based in Montreal, Canada), which exports citrus products throughout the world. Besides holding exclusive distribution rights to Cape deciduous and Outspan citrus fruit from South Africa, Fisher is entrusted with the marketing and distribution of fruit from several of Chile's most prestigious growers.

Outspan works in conjunction with fruit boards and producers to design import programmes that meet the varied demand of the market place. The fruit is then procured in a logical and controlled manner for the length of its particular season, ensuring the customer the freshest possible supply of products at all times. The major shipper of Outspan exports is Co-operative Shipping Service (CSS), a Cape Town-based company with offices in Cape Town, Port Elizabeth and Durban.

Outspan's research and extension division employs nearly half of the company's staff. The division also conducts production and operation research, and manages the citrus improvement programme, Outspan laboratories and extension services. The South African citrus export industry is seen by some as a model for integration. This integration is allegedly achieved by government regulation of the export market and by the appointed agent for that export, namely Outspan. All functions such as

research, packing, quality control, shipping, marketing and exporting resort under this agency.

Outspan is responsible for creating and administering special promotional programmes to increase the visibility of the products at the retail level. Working with public relations and advertising, Outspan establishes and enhances brand awareness for the products it promotes and reaches consumers through news reports, food editorial pages, television and radio talk shows.

For decades Outspan has had a virtual monopoly in the export of citrus products from South Africa. Through a number of international agents, Outspan has been able to develop unique systems of both marketing and transporting South African citrus products. With increasing liberalisation, several smaller citrus exporters might capture some of the market that used to be controlled by Outspan.

Almost all citrus exporters in South Africa are shareholders in Outspan. In 1997 Outspan entered into a joint venture with Metro International in Hong Kong. The joint venture will facilitate the distribution of products in Hong Kong, the Pacific Rim and China. The new company, METSPAN, is involved in a similar joint marketing drive, called CAPESPAN, with UNIFRUCO in the Western Cape.

UNIFRUCO

UNIFRUCO is a company fully owned by fruit growers and in the words of Fred Meintjies, its public affairs manager, “fruit growers control their own destiny”. The sole purpose of the company is export and it depends on free and fair international market access to successfully market the products of its suppliers.

UNIFRUCO is the largest exporter of fresh deciduous fruit and interacts with other exporters via the Exporters’ Forum. As from 1 October 1997 the deciduous fruit industry was to be deregulated with the abolition of the statutory arrangements that existed under the deciduous fruit scheme. To fill the void left by the lifting of the previous statutory arrangements, the deciduous fruit industry has formed the Deciduous Fruit Producers’ Trust (DFPT) to take care of common industry matters. The

industry also established an Exporters' Forum to develop common positions with regard to the export of fresh deciduous fruit.

Under the previous arrangements all matters dealing with foreign trade as far as the industry was concerned, were dealt with via the Agricultural Trade Forum of the Department of Agriculture. The horticultural export industries—relating to deciduous fruit (fresh, dried and canned), citrus and subtropical fruit, fruit juices, vegetables and flowers—formed a specialist group, namely the Horticultural Industry Trade Task (HITT) Group, to co-ordinate all input from these industries to the Agricultural Trade Forum. The HITT Group, on which the DFPT is represented by means of a member of the Exporters' Forum, continues to formulate the common industry position on trade matters and to convey this via the Department of Agriculture's trade forum.

Currently organisations and exporters interact with a number of government institutions such as the national Department of Agriculture, the Department of Trade and Industry and the Board on Tariffs and Trade in relation to licences, exporting, procedures, export enhancement, enhancement of international market access etc. It is the view of UNIFRUCO that procedures for agriculture should be amalgamated under the auspices of the Department of Agriculture. UNIFRUCO is also of the view that interaction with the deciduous fruit industry regarding agricultural trade policy should be through a single organisation such as the South African Department of Agriculture's trade forum.

South African Foreign Trade Organisation

The South African Foreign Trade Organisation (SAFTO) (Pty) Ltd is a company established by the government to provide general international trade information through its research and information division. In addition, SAFTO's International Trade Consulting Service provides export assistance to both new and established exporters. Through SAFTO's education and training courses, and its internationally accredited three-year diploma in export management, it helps both the beginner and the more experienced businessperson to acquire the expertise necessary to

function successfully in the global market place. SAFTO's International Development Centre caters for the foreign businessperson wishing to pursue business opportunities in South Africa. However, SAFTO's agricultural desk has apparently been closed down. It also appears that due to under-funding and limited capacity, the work of SAFTO was apparently scaled down.

Gaps and overlaps

It appears that there is no agreed, well-defined and co-ordinated agricultural trade promotion institutional framework in South Africa that can successfully capture new international markets and promote export.

Different government departments and private sector agencies have developed their own vision and mission statements, goals and strategic objectives for promoting agricultural trade. However, so far the roles of the national Department of Agriculture and the Department of Trade and Industry in terms of trade promotion of primary agricultural products have not been clarified. Interaction between the two departments is often ineffective and cumbersome. The differences are more apparent at NEDLAC. The perception of bias towards industrial development within NEDLAC needs to be addressed, as agro-businesses allegedly feel alienated.

Recommendations

From the preceding discussion the following recommendations emerge:

Inter-sectoral co-ordination

There is a need for an inter-sectoral co-ordination mechanism to foster integration in policy making, goal setting, programme and project implementation, and the evaluation of this integration. The current co-ordination mechanisms such as the Agricultural Trade Forum and others lack creativity and innovation.

Legislation review

The process of reviewing all legislation to ensure compliance with the new Constitution should be augmented. Where there is incompatibility the situation should be rectified with immediate effect. A review mechanism to monitor different interpretations of national directives, regulations and legislation should be considered.

Communication strategy

Lack of appropriate and effective communication is one of the greatest problems facing those promoting agricultural trade. In order to improve communication, each government department should have built-in mechanisms for effective communication. This could ensure that new policies are communicated without confusion and translated into integrated programmes with clarity. An effective communication strategy could also build consensus during the development of an agricultural trade promotion policy. Although the national Department of Agriculture and the Department of Trade and Industry interact at various levels, notably at the Agricultural Trade Forum level, it is suggested that, where appropriate, institutions should be rationalised to ensure effective communication.

Human resources development

The stifling nature of the present public service has resulted in the departure or flight of visionary and skilled personnel from the public service. This “brain drain” leaves a vacuum in crucial departments. Mechanisms should be sought to ensure creativity, especially in replacing senior managers, including secondment from the private sector and tertiary institutions. In making key appointments in the departments of Finance, Trade and Industry and Foreign Affairs, consideration should be given to those with agricultural background.

Monitoring and evaluation

Present institutional arrangements lack monitoring and evaluation systems to measure performance and evaluate policy outcomes. Annual reports,

which government departments (and other agencies) prepare, are largely skeletal and seldom helpful. These reports fail to objectively outline the successes and failures of the previous year. In addition, they are not flexible enough to give immediate feedback to policy makers and implementers.

Three strategic options

Three strategic institutional options are available: the creation of an umbrella organisation or network as suggested in this chapter; the increase of capacity and expertise within the Department of Trade and Industry to promote primary agricultural trade; and a more significant role for the Department of Agriculture in facilitating and, where appropriate, co-ordinating agricultural trade promotion.

Option one: Creation of an umbrella organisation

The first option, which is also supported by some key stakeholders, is the creation of an umbrella organisation comprised of all role players. A voluntary network, it could facilitate co-operation and interaction. The aims of the organisation could be to:

- set overall objectives for promoting international agricultural trade
- develop programmes and actions to promote unique selling points on a national level as well as per individual industry
- differentiate objectives and actions on a policy, a technical and a commercial level and then produce outputs in a unique South African initiative
- ensure that local producers and local consumers are protected against inferior quality and unfair competition
- ensure that all actions and decisions are taken with a view to job creation/protection and food security

The proposed umbrella organisation should not be seen as taking over the excellent work done by different industry marketing agencies. The organisation should ensure that none of the role players feel threatened or

dominated. This proposal is in line with the concept of “co-operation to compete” developed by the Department of Trade and Industry. An overall plan should therefore be developed so that the abilities, competence, etc. of the various role players will complement each other.

Option two: Enhancing the role of the Department of Trade and Industry

This option entails an increase in the capacity and expertise within the Department of Trade and Industry to promote primary agricultural trade. It also implies increasing the status of agriculture within the Department of Trade and Industry.

Option three: Enhancing the role of the Department of Agriculture

The Department of Agriculture could consider playing a more significant role in the facilitation and, where appropriate, co-ordination of agricultural trade promotion. This implies either building the capacity of the Economics and Marketing Directorate, or expanding the focus of the National Agricultural Marketing Council to include export trade promotion. The Agricultural Trade Forum could also be utilised for both trade promotion and the development of marketing strategy. Furthermore, the Agricultural Trade Forum could develop lobbying strategies to ensure that South African agricultural products are promoted internationally.

Concluding remarks

The conclusion emerging from this chapter is that there is no co-ordinated, integrated agricultural trade promotion in South Africa. Over the past century the state and the private sector created several institutions to promote agricultural trade.

Over time the state passed legislation that created monopolistic institutional arrangements. Some of those institutions have excelled in marketing specific agricultural products. However, the changing political and economic context in the world calls for innovative, cost-effective and efficient institutional arrangements.

The national Department of Agriculture apparently only started getting involved in agricultural trade promotion in 1994. Primary agricul-

tural trade promotion has been accorded a low status within both NEDLAC and the Department of Trade and Industry. Expertise and capacity in both the national Department of Agriculture and the Department of Trade and Industry are limited. Expertise and experience reside within the private sector, but it is sectorally divided. Overlaps within the private sector are very limited.

The following seem to be key recommendations emerging from this report. First, the national Department of Agriculture should create an enabling environment for primary agricultural trade promotion, and also facilitate the development of a national policy framework outlining critical pathways for agricultural trade promotion and international market access. Second, effective channels for unambiguous communication should be established between the departments of Trade and Industry, Foreign Affairs and Agriculture. Current inter-governmental structures, committees and teams do not appear to have created a fundamental framework for effective consultation and co-ordination on matters related to agricultural trade promotion.

One common theme that emerged is that the new political dispensation instituted in 1994 has affected government departments and other institutions in different ways. The publication of the *White Paper on Agriculture* in 1995 marked a major change in the agricultural sector. The new policy marks a significant shift away from state or monopoly control in the marketing of agricultural products. The establishment of the National Agricultural Marketing Council in 1996/7, which has also been mandated with the task of facilitating the abolition of market boards, marks a significant milestone.

In spite of significant transformation in the departments of Agriculture, Foreign Affairs, Trade and Industry and Finance, major problems remain to be dealt with, namely capacity constraints, and limited resources and expertise to adequately promote primary agricultural products. The perception that agriculture is a Cinderella sector within the Department of Trade and Industry needs to be addressed.

Based on interviews conducted with key stakeholders, there is consensus on the creation of a national vision for exporting agricultural

products. What appears to be a key aspect in the development of the vision is the establishment of an agricultural trade promotion strategy within the context of the national vision. Appropriate resources should be allocated to create efficient infrastructure. As the World Trade Organisation negotiations continue a well-prepared South African team should be in place to effectively communicate the case for South African agriculture.

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