



The Structure and Dynamics of South Africa's Food System - the COVID-19 Context

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with

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Table of Contents

1. Introduction	3
2. South Africa's corporate food regime	4
2.1. Deregulation and liberalisation of agriculture	6
3. Outcomes of agricultural restructuring	7
3.1. Large-capital intensive farms	7
3.2. Concentration in input supply and food processing	7
3.3. The rise of supermarkets in the food system	8
3.4. Redistributive social policies and the food system	9
4. Food security in South Africa: key patterns and trends	10
5. The right to food	12
6. Alternatives to the corporate food system	13
6.1. Agrarian reform	14
6.2. Local food systems	14
6.3. Agro-ecological farming	16
6. Smallholder farming practices and markets dynamics	17
6.1. Age and gender of smallholder producers	17
6.2. Farming practices of smallholder producers	18
6.3. Crop diversity in smallholder farming systems	19
6.4. Fresh produce surplus	20
6.5. Packaging of fresh produce	20
6.6. The predominance of informal markets	21
7. Conclusion	22
8. References	24
Table 1: Price increases during the COVID-19 crisis (PMBEJD, 2020).	11
Table 2: Age distribution of smallholder producers (n=58)	17
Table 3: Gender of smallholder farmers (n=78)	18
Table 4: smallholder farming practices (n=69)	18
Table 5: What fresh vegetables do you grow in the course of the year (n =77)	19
Table 6: What fresh vegetables do you currently have for sale? (n=77)	20
Table 7: Is the farmer able to prepare and pack fresh produce (n = 78)	20
Table 8: where do you sell your produce (n =77)	21

1. Introduction

There have been growing calls in civil society for the need to promote local food systems and short value chains as an alternative to the concentrated corporate food system. This has emerged particularly in the Covid-19 lockdown period which resulted in a disruption of the food system leaving millions of women, children and men unable to access their daily food requirements. The effects of the lockdown were well documented in media reports, and included: rising levels of child malnutrition with the closure of schools and the daily meal provided through feedings schemes, loss of formal and informal employment creating cash constraints for food purchases, increased prices of food creating affordability constraints for the poor, the closure of community spaza shops and street traders reducing access to food, and the disruption of small farmers' markets as bakkie traders and street hawkers were compelled to stay at home.

This report aims to provide a brief review of the history of the SA food system and discuss the conditions that may be required to realise alternatives to the corporate food system. The aims of this report are threefold. First, the report will examine the structures and dynamics of the pre-Covid-19 food system in South Africa. Second, the report analyses household food security, including the Food Barometers developed by the Pietermaritzburg Agency for Community Social Action (PACSA). Third, the report briefly analyses a small data base of small producers in Limpopo and KZN to ground discussions in farmer realities.

The Land National Network Engagement Strategy (LandNNES), a network of civil society organisations working with small farmers, in collaboration with Gender CC, ACBIO and Food Lab (and supported by ILC and Heinrich Boell) undertook a short-term action research project on food systems and the possibility of developing alternate systems based on short value chains. The project is working together with a similar initiative that has been undertaken in Gauteng under the umbrella of the Covid-19 People's Coalition, and in a more limited form in two districts in Limpopo. The project was initiated by ACBIO and aims to identify three crucial areas of localized/informal food systems and how they intersect: urban and rural food production by small scale producers; localized informal fresh food markets and the nature of their value chain; household food consumption dynamics and what informs where households purchase food and what food they purchase. The immediate action of the research was to provide a temporary market to small farmers by purchasing their surplus fresh produce, provide interim incomes to bakkie traders and *omalume*¹ (also school children transporters) by contracting them to transport fresh produce and provide nutritious fresh produce to households in urgent need of food and vulnerable to hunger. To this end, the project procured fresh produce from 32 small scale farmers² in the Umgungundlovu District in KwaZulu-Natal, contracted four *omalume* to transport the produce, and delivered food parcels to over 218 households including child and women-headed households, widows, households living on

¹ The term *omalume*, loosely translated, means 'the uncles' and this broadly refers to local men who own open trucks and usually transport goods in their localities. In most instances, *omalume* also provide transport to school children. As shown above, some of them are traders selling fresh produce which they transport with their bakkies. During Covid-19 lockdown, many *omalume* lost their sources of income as street traders, schools and construction industries all closed. The project aimed to support local transporters as a critical element in local food chain configurations.

² The action research also sought to map out the nature and character of local food systems. To this end, the research team collected data from a total 78 smallholder producers in three Districts, two in Limpopo and one in KwaZulu-Natal. The 32 farmers who supplied fresh produce for food parcels are part of the selected sample of 78 smallholder producers presented in Section 6 of this report.

farms, foreign nationals, people living with disabilities, TB, HIV or Aids, sex workers and those whose primary breadwinners had lost their jobs during lockdown.

A key learning and outcome of the immediate action was the recognition that a network of organisations working across the space occupied by people marginalised by government and formal markets is needed in order to intervene rapidly and urgently to address food supply blockages arising from the dysfunctionality of the food system under lockdown. A second important finding and learning is the hugely important role that small farmers, mostly women, play in securing community level food access despite their relative invisibility to the state, which provides scant support to them. Without these farmers, levels of hunger would have been significantly higher than they already are.

The longer term objective of the action research is to map aspects of a poorly understood local food system in order to identify features that could be strengthened and replicated in the future in order to develop a more diverse and decentralised food system. The ultimate aim is to recalibrate the food system so that it is more inclusive, democratic and less vulnerable to shocks. This report constitutes a key output of the action research and will become part of a future process aimed at understanding how to recalibrate the food system and to advocating for policy that supports such a system.

2. South Africa's corporate food regime

South Africa's food system is dominated by a few private corporations and is largely structured to maximise profits for large agribusiness corporations instead of meeting the food needs of the poor. Greenberg defines a food system as "a long-lived set of institutional arrangements and social relations governing the production, distribution and consumption of agricultural commodities and food – linked to global accumulation". There is evidence of corporate concentration in South Africa's food system as large agribusiness corporations exercise great control on the input, production, distribution and retail side of the food sector.

Within the corporate food system, the motive force of profit prevails over concerns about equity and nutrition (Weis, 2007:13). Companies, both upstream (input supply) and downstream (food processing distribution, retailing) of farming are compelled³ to expand, through mergers, acquisitions and joint ventures, in order to stay competitive. Generally, this results in corporate concentration whereby a few large private companies with significant economic power, dominate decision making processes in the food system (Weis, 2007). The recent acquisition of South Africa's major food company, Pioneer foods, for US\$1.7 billion (R26 billion) by the American food giant, PepsiCo, is illustrative of the overall thrust towards corporate concentration⁴.

With a few powerful companies controlling the input supply industry, farmers are compelled to absorb high input costs while the food processing, distribution and retailing absorb the profit margins through low farm gate prices. Magdoff et al. (in Weis, 2007) notes that 'farming is one of the few businesses that pays retail prices for inputs and sells its produce at whole sale prices'. Only large-scale farms reliant on capital-intensive and industrial methods of farming tend to survive.

³ Within a capitalist economy, profit maximisation is the primary goal and this requires capitalist enterprises to invest in new techniques and technologies in order to remain market-competitive or provide goods and services at competitive prices. Large enterprises are better able to mobilise the necessary capital to expand and remain competitive and profitable than small enterprises.

⁴ Katharine Child. 2020. PepsiCo purchase of Pioneer is finalised. Business Day, <https://www.businesslive.co.za/bd/companies/retail-and-consumer/2020-03-06-pepsico-purchase-of-pioneer-is-finalised/>

Smallholder producers often fail to compete profitably in an economic environment dominated by big producers. Most small-scale farmers either drop out of production due to declining profit margins or they are simply absorbed by large and more competitive producers. Consequently a corporate food system is typically characterised by big farms and big corporations.

Some of the common features of a 'corporate food system' include:

(a) Generally high levels of debt as farmers acquire machinery, inputs and expand operations in order to remain competitive. Farming has also become highly financialised since agricultural land has become attractive to financial investors as an asset class. The energy and food crisis in 2008 and increased demand for land to grow biofuels prompted increased demand for agricultural land.

(b) The abandonment of ecologically sustainable, local methods of farming, for instance, intercropping proven to improve soil qualities. Instead the corporate food system is associated with industrial mono-cropping where vast tracts of land are dedicated to the cultivation of single crops to maximize yields and profits⁵.

(c) Food miles or the distance food travels from production to the point of consumption have increased significantly. The integration of farming into global value chains and the vast distribution networks of large retail supermarkets means that food can easily reach distant national and global markets.

(d) A key contradiction, inherent in the corporate food system, is the global rise in food hunger, food insecurity, undernutrition and malnutrition, in spite of technological advances that have tremendously increased crop yields. The underlying cause is the profit logic governing the corporate food system. There is evidence of rising food costs, increasingly unhealthy diets linked to the proliferation of processed food, lack of access to fresh food and limited access to diverse diets. This affects the poor in rural and urban areas.

(e) In rural areas, the collapse of rural production, emanating from the increasing costs of production and low farm-gate prices, has triggered a crisis of livelihoods in many countries of the global South. In the past, municipal supported markets and rural trading stores have provided markets for smallholder producers. However, increasing competition from ever-growing retail supermarkets has resulted in the decline of these marketing channels. This has further contributed to the decline in rural production and livelihoods.

Global economic shocks coupled with enduring crisis of climate change and more recently the outbreak of the COVID-19 pandemic continue to expose some the vulnerabilities of the corporate food regime. Analysts have long argued for an alternative development trajectory and food system. Different alternatives have been proffered, namely 'localised food systems', 'local food economies', community based food systems (Kelly and Schulschenk, 2011). These different alternatives argue that local food systems are more equitable, resilient, sustainable (Kelly and Schulschenk, 2011).

However, mainstream accounts still argue that the corporate food system is indispensable especially considering the growing world population and food needs. These 'productionist' frameworks argue that private corporations, through market mechanisms will greatly increase food supply and avert hunger and food insecurity. Creating a conducive environment for economic growth, encouraging an active role for private corporations, automatically addresses key challenges on the supply side of the food system and this, in turn, enhances food security and nutrition.

⁵ Industrial monocropping is best suited for mechanised farming which is meant to boost productivity, yields and profits.

What is often neglected are adverse impacts of corporate concentration on other key nodes of the food system. The various ways in which the structuring of connections between farming, trade, processing and consumptions in the corporate-driven food system adversely affects livelihoods is widely documented. Smallholder producers are outcompeted by large-scale capitalist farmers resulting in the collapse of rural production. This is evident in the pervasive process of de-agrarianisation whereby smallholder producers drop out of production in the face of rising production costs and low farm-gate prices.

On the consumption side, increases in food supply have not always improved human welfare. In fact, there are some critical questions that are usually neglected by those who advocate for the productionist, corporate food regime. A key consumption-related issue is the increasing burden of diet-related chronic diseases, namely obesity, diabetes and cardiovascular complications and their strain to public health systems. Bernstein (1996:123) argues that there are key questions on the importance of food for human welfare and reproduction and the association of poverty with diets inadequate in quality and quantity and/or quantity. These set of issues relate to questions on who eats what? How much? How often? How do they acquire their food?

South Africa's national food regime has been profoundly shaped by the broader processes of capitalist accumulation in the global economy. Corporate control of the global food economy has been on the rise since the post war period and the adoption of neo-liberal trade policies and their institutionalisation through the World Trade Organisation. In South Africa, the dominance of private corporations in the food system is an outcome of extensive liberalisation and deregulation policies.

Following the acute recession of the 1970s, the apartheid government was compelled to restructure the economy and these reforms encompassed the reduction of direct state intervention in the economy. This marked the advent of deregularisation and liberalisation measures, which intensified in the early 1990s. Thus, liberalisation measures involved reducing the barriers to trade and freeing markets while deregulation cut back on state intervention in the economy and reduced state expenditure (Greenberg, 2015)

2.1. Deregulation and liberalisation of agriculture

Greenberg (2015:963) examines how the key aspects of deregulation and liberalisation in South Africa set the foundation for the highly concentrated food system.

- (a) Deregulation produced far-reaching changes to the governance structure of the agro-food system and was finalised with the Marketing of Agricultural Products Act in 1996.
- (b) The state withdrew subsidy support for baseline quality control including direct support of research and development. These various boards were dismantled and their assets handed to private commodity associations to manage on behalf of each sector, for instance, meat and grain.
- (c) These assets were placed under the custodianship of trusts mandated to serve the various private interests in each sector and to promote the development of black commercial farmers in different commodity sectors.

The state also reduced its role in commercial and agricultural financing through the withdrawal of credit and input subsidies. The Land Bank lending rates were no longer subsidised and this inevitably increased the cost of credit for farmers.

While the idea was to ensure a competitive commercial farming sector, not dependent on subsidies, deregulation and liberalisation measures adversely affected the smallholder farming sector. Post-apartheid land reform basically emerged in a context where agricultural support for agriculture and related institutional infrastructure had been privatised.

(d) The Co-operatives Amendment Act of 1993 allowed for the corporatisation of agricultural corporatives and placed their substantial assets in private hands. Citing Sikuka, Greenberg (2015) notes that the Cooperatives Amendment Act allowed the co-operatives to expand their range of business, and convert into private companies, and 90% of agricultural co-operatives converted into private companies”.

(e) This set in motion a wave of mergers and acquisitions centred on core co-operatives – including the Oos Transvaal Co-op (which became Afgri), Senwes, Noord Wes Koop (NWK), Vrystaat Koop Beperk (VKB)’.

(f) Smaller agricultural co-operatives were merged with the larger ones as the latter became fully-fledged businesses with a provincial, national and continental presence’ (see Greenberg, 2015:963).

The deregulation and liberalisation of agriculture augmented the role of private corporations in the food system. This is manifest in the high levels of concentration in South Africa’s food system.

3. Outcomes of agricultural restructuring

3.1. Large-capital intensive farms

South Africa has a highly dualistic agrarian structure whereby a small number of large-scale commercial farms, highly integrated in global value chains both upstream and downstream of farming produce the bulk of marketed output. These farms constitute the ‘productive core of capitalist farming’ (Cousins, 2013). A recent agricultural census by StatsSA (2017) reveals the high levels of concentration in the commercial farming sector. According to StatsSA (2017), 2 610 large farms (those with annual income of more than R22, 5 million) constituted 6, 5% of the total number of farms in the commercial agriculture industry, and accounted for 67, 0% of total income and 51, 4% of total employment.

A few large capitalist farms have come to dominate the agricultural sector as large companies buy out competitors to expand their operations and landholdings. The highly competitive nature of agriculture has resulted in the number of commercial farming units dropped precipitously from about 60,000 in 1996 to around 35,000 in 2014 (Cousins and Hall, 2015:3).

3.2. Concentration in input supply and food processing

Liberalisation policies also enabled multinational corporations in the input supply industry to penetrate the South African market. There has been significant consolidation in the seeds, fertilisers and pesticide sectors as international corporations buy up or buy into South African companies (Hall and Cousins, 2013). Large agro-processors, have benefitted from rising demand for processed foods, and the industry is highly concentrated with a few large corporations dominating the sector.

Igumbor et al. (2012) show how 'big food' companies dominate different sectors of the food processing industry in South Africa.

According to Igumbor et al. (2012) although there are 1800 food manufacturing companies in South Africa, big corporates account for a huge proportion of the sales. Statistics reveal that 'the largest ten packaged food companies in South Africa account for 51.8% of total packaged food sales while artisanal packaged processed foods account for only 7.3%' (Igumbor et al., 2012: 2). The top ten soft drink companies account for 79% of the total soft drink sales in South Africa and three of these companies (Coca Cola Co., PepsiCo Inc., and Danone Groupe) account for 64.7% of the market between them while the other top companies contribute 3.8 percent each (Igumbor et al., 2012: 2).

3.3. The rise of supermarkets in the food system

The prominent role of supermarkets in the corporate food system has been widely documented (Crush and Frayne, 2011; Louw et al., 2007). Crush and Frayne (2011) assert that the 'supermarket revolution' has radically transformed the nature and organisation of food provisioning in the developing world. The rise of supermarkets has entailed the expansion of these retail giants beyond the upper and middle income neighbourhoods. In recent decades more consumers beyond the affluent elite have been incorporated into the retail commodity circuits.

Corporate concentration is also a key feature of supermarketisation. In many parts of the world, including South Africa, a few corporate giants control food distribution through supermarket chains. In the South African context, supermarketisation is driven and co-ordinated by a small number of large and highly competitive corporations including Pick and Pay, Shoprite, Wool Woolworths and Spar. The entry of global retail giants like Walmart into the African market through the acquisition of South African retailer Massmart has intensified corporate concentration in the retail supermarket sector (Crush and Frayne, 2011:782).

Supermarket expansion entrenches the tight value chains, undermines local food economies, mostly by reconstituting and eliminating alternative markets. According to Ortmann and King (2010), a key development in South Africa, for instance, is the elimination of spot markets (such as municipal fresh produce markets) in favour of sourcing via procurement specialists (sometimes in-house companies). These intermediaries buy primarily from a limited number of preferred producers able to ensure supply of products of consistent quality, food safety and volume (Ortmann and King, 2010:404). Thus, the viability of municipal fresh produce markets in South Africa was greatly undermined by the growing influence of supermarkets in food distribution.

South Africa's remote rural locales have also experienced supermarket penetration. du Toit and Neves (2007) argue that supermarket penetration in rural South Africa has contributed to the collapse of smallholder production. Supermarkets by-pass local producers and procure most of their supplies from distant locales through centralised distribution centres. du Toit and Neves' (2007) research showed that supermarkets in the rural town of Mt Frere, Eastern Cape sourced milk, meat and other perishables from distant commodity markets in Kokstad, Durban and East London which outcompeted local producers.

While mainstream arguments often advocate for greater inclusion of smallholder farmers in the value chains, in practice this has proved very elusive. Smallholder producers often fail to meet the stringent requirements in terms of quality and food safety systems. The requirement for the consistent supply of large volumes of agricultural produce essentially inherently excludes small-scale farmers from the procurement contacts. Supermarket procurement systems inherently favour large

and well-established producers. This fundamentally constrains the participation of smallholder producers especially historically disadvantaged black farmers in the tight value chains (Low *et al*, 2007).

Supermarkets were originally associated with affluent neighbourhoods and often targeted wealthy groups as their primary market. However, the supermarket revolution has seen the rapid expansion of supermarkets into remote rural locales and poor urban communities on the back of social grant distributions. However, this expansion has also been uneven and differentiated given the enduring apartheid geography and related inequalities in South Africa. Some studies still show that some poor communities in South Africa's metropolises have to travel over long distances to access supermarkets⁶ (Battersby, 2011). These poor communities tend to rely on small trading stores and Spaza shops, and often pay higher prices for food and basic necessities (Battersby, 2011).

A growing phenomenon in South Africa is the corporate penetration of the Spaza sector as major supermarkets chains seek to exert more direct control of the township market. The township market was historically the exclusive preserve of small, mostly family operated trading stores and spaza shops. In 2016, PnP initiated the 'from spaza to store' model that basically aims to modernise spaza shops and turn them into "thriving neighbourhood convenience stores"⁷ (PnP, 2018). Similarly, Shoprite rolled out its small container shops in different communities in order to gain a share of the township market⁸ (Business Insider, 2019). However, there are growing concerns that the corporate penetration of the township market by retail giants could undermine local livelihoods. This is partly evident in the decline of independent grocery retailers in the townships following the spread of large retail supermarkets into these spaces⁹ (Daily Maverick, 2019).

3.4. Redistributive social policies and the food system

Often overlooked is how the expansion of the corporate food system in South Africa is underwritten by the redistributive state policies and specifically the sustained expansion of state welfare transfers. Thus, widespread unemployment and limited scope for small-scale food production has seen the government broadening social protection programme (Pritchard *et al.*, 2016). In fact, state social welfare transfers are a key component of the national growth path and these redistributive policies have seen an expanded social grant system in the post-apartheid era.

The 2018/19 South African Social Security Agency (SASA) annual report reveals that, in 1994, there were about 2 million social grant recipients. Statistics indicate that by March 2019, the number of social grant recipients had increased to 17.8 million. About 13 million of these grants are in the form of child support grants and 3.5 million old age grants. Disability grants are estimated to be just over a million. According to SASA (2019), the South African government spent R163 billion on social assistance, approximately 3% of the country's GDP (SASA, 2019). According to Pritchard *et al.* (2016:13) South Africa's extensive redistribute mechanisms are key to sustaining a version of

⁶ Battersby's (2011:553) research shows that marginalised communities in Cape Town, for instance, Ocean View, "has no supermarket and residents have to travel several kilometres on public transport to get to the shop, thus adding to the cost of their food".

⁷ Pick and Pay. 2018. Integrated Annual Report.

<https://www.picknpayinvestor.co.za/financials/annual-reports/2018/case-study-from-spaza-to-store.php>

⁸ Helena Wasserman, 2019. Shoprite plans smaller stores, closer to shoppers – and more shops in containers. Business Insider, <https://www.businessinsider.co.za/shoprite-smaller-stores-containers-2019-8>

⁹ Ray Mahlaka. 2019. Retail giants face having township wings clipped. Daily Maverick, <https://www.dailymaverick.co.za/article/2019-12-17-retail-giants-face-having-township-wings-clipped/#gsc.tab=0>

neoliberalism that is strongly dependent on the state to maintain a fragile status quo and to create market demand, via the provision of grants to a permanent, wageless population.

However, advocates of the corporate food system see the expansion of supermarkets as a means to ensure the efficient availability of affordable food, especially to an ever-growing population. However, this conflates food availability and food access. Most poor rural and urban communities do not afford to purchase their food requirements. In addition, this overlooks the reality of food inflation. As Greenberg (2013:4) argues, “the profitability of corporate agribusinesses is [also] built on the back of sharply rising consumer prices for food, and the consequent rise in hunger”. Within the corporate food system, abundant food supplies often coexist with growing food insecurity and hunger for the marginal populations.

4. Food security in South Africa: key patterns and trends

The National Planning Commission (2011) distinguished between, on the one hand, national food self-sufficiency and food security and access to food by poor people, on the other hand. According to the NPC (2011), South African is food secure nationally and this has been the case for decades. This is manifest in the fact that agricultural export earnings have been sufficient to cover the costs of food imports (NPC, 2011). In contrast, household food security is determined by the ability to access food and not the mere availability of food. Food security therefore exists when everyone has access to sufficient, nutritious and safe food at all times (NPC, 2011:210). This means that food is available both nationally and locally and people have access to it through purchase and other legal means (ibid).

The NDP identifies some key strategies to enhance food security. However, these set of measures do not address the underlying causes of food insecurity within consolidated food systems. According to the NPC (2011), strategies to enhance food security include:

- (a) Minimising the impacts of retail food prices on the poorest households.
- (b) Using and expanding existing public works programmes for rural infrastructure development and improving rural incomes.
- (c) Ensuring broader access to social grants for eligible households

The South African National Health and Nutrition Examination Survey (SANHNES-1), based on a sample of 8168 households across South Africa also reports high levels of food insecurity. According to the SANHNES-1 report:

- (a) About 45.6% of the population were food insecure, 28.3% were at risk of hunger and 26.0% experienced hunger.
- (b) The largest percentage of participants who experienced hunger (food insecurity) was in urban informal (32.4%) and in rural formal (37.0%) localities.
- (c) The highest prevalence of being at risk of hunger was in the urban informal (36.1%) and rural informal (32.8%) areas. The lowest prevalence of hunger was reported in urban formal areas (19.0%).
- (d) In terms of provincial patterns, the prevalence of hunger was the lowest in Western Cape (16.4%) and Gauteng (19.2%).

(e) The Eastern Cape and Limpopo were two provinces with a hunger prevalence higher than 30%.

(f) Food insecurity is high amongst black Africans (30.3%), followed by the coloured population (13.1%). Also, 30.3% of the black African population and 25.1% of the coloured population were at risk of hunger.

(g) A large percentage (28.5%) of the Indian population was also at risk of hunger. The majority (89.3%) of the white population was food secure (SANHNES-1, 2013: 10).

Rising food inflation is a key driver of food insecurity in South Africa. South Africa's food price increases have generally tended to follow international food movements and there has also been a generally upward trend in price increases in South Africa compared to international prices movements overall (Rangasamy and Nel, 2014). Poor households in South Africa are greatly exposed to the impacts of retail food price increases. Estimates indicated that South African households in the lower income decile (1-3) spend about 35% of their income on food. Conversely, those households in the upper income deciles only spend an estimated 3% of their household income on food purchase (NDP, 2011).

The PACSA Food Price Barometer provides important insights on the adverse impacts of price fluctuations and overall food price inflation on the welfare of poor households¹⁰. According to PACSA, this Barometer tracks the monthly price of the foods in the trolleys of low income households in Pietermaritzburg. Research by PACSA reveals that between November 2014 and November 2017, inflation on the PACSA Food Basket increased by 23%. This means that there was a 23% increase in food prices over three years. During the COVID-19 crisis, the Pietermaritzburg Economic Justice and Dignity Organisation (PMBEJD) has tracked changes in food prices and their measures show that poor households to rising food inflation (PMBEJD, 2020).

Table 1: Price increases during the COVID-19 crisis (PMBEJD, 2020).

Prices increases	2 March	2 April	23 April	% increase in 2 weeks	% increase in 2 months
Household Food Index	R3221,00	R3408,08	R3473,75	1,9 (R65,67)	7,8 (R252,75)
Basic Nutritional Index for Children	R 640,83	R655,87	R670,30	2,2 (R14,43)	4,6 (29,47)
Domestic and Hygiene Products	R 660,09	R 694,74	R 709,18	2,1% (R14,43)	7,4 % (R49,09)

2020 data from the Pietermaritzburg Economic Justice and Dignity Organisation (PMBEJD), which tracks food price measures through the Household Food Index, the Basic Nutritional Index for Children and the Domestic and Hygiene Products Index shows a marked increase in prices as a result of the COVID-19 crisis (see Table 1):

- The Household Food Index shows marked increases in food prices as a result of the COVID-19 related shocks to the food system. Data on the prices of 38 food household food items over a period of three weeks (02 April 2020 to 23 April 2020) shows that the cost of the household food basket increased by R65, 67 (1,9%) to R3 473, 75 on the 23 of April 2020.

¹⁰ Abrahams, M. (n.d.). PACSA Food Price Barometer. KwaZulu-Natal Department of Agriculture Colloquium, https://www.kzndard.gov.za/images/Documents/RURAL_DEVELOPMENT/KZN_DARD_Colloquium/PANEL_2/Mr-Mervyn-Abrahams-PACSA----Food-Price-Barometer.pdf

Over a period of two months, from 2nd March 2020 to 23 April 2020, the cost of the household food basket increased by R 252,75 (7,8%), from R3 221, 00 on the 2nd of March 2020 to R3 473, 75 on the 23rd of April 2020.

- Price increases also reflect in the Basic Nutritional Price Index for Children owing to the COVID-19 crisis. Over three weeks, from 2nd April 2020 to 23 April 2020, the cost of feeding children a basic nutritious diet increased by R14, 43 (2, 2%) to R670, 30 on the 23rd of April 2020. Data for a two month period, from 2nd of March 2020 to the 23rd of April 2020, reveals that the cost of feeding children a basic nutritious diet increased by R29, 47 (4,6%) from R640,83 on the 2nd of March 2020 to R670, 30 on the 23rd of April 2020.
- There is also evidence of price increases captured in the Household Domestic and Personal Hygiene Index. Over a period of three weeks, from 2nd April to 23rd April, the cost of the household domestic and personal hygiene products basket increased by R14,43 (2,1%) to R709,18 on the 23rd of April 2020. Price data for a two month period, from the 2nd of March to the 23rd of April shows that the cost of the household domestic and personal hygiene products basket increased by R49,09 (7,4%), from R660, 09 on the 2nd of March 2020 to R709, 18 on the 23rd of April 2020 (PACSA, 2020).

Food inflation amidst rising poverty and unemployment has been linked to the proliferation of cheap and unhealthy diets especially amongst the poor households. Poor South Africans often consume cheap, energy-dense foods (pap, bread and sugary drinks and snacks) that are easily accessible but nutritionally poor (Kroll, 2020). Generally, it is relatively easy to access diets with macronutrients (carbohydrates, fat and protein) while balanced diets with adequate micro-nutrients (vitamins and minerals) are more difficult to access (Drimie and Ruysenaar, 2010). This contributes to the triple burden of malnutrition –the simultaneous existence of hunger, obesity and micronutrient deficiency. Kroll (2020) argues that the threat of immediate hunger forces poor South Africans to make choices that erode their long-term health, employment and development prospects (Kroll, 2020:2).

5. The right to food

The right to food was first recognised in Article 25 (1) of the 1948 Universal declaration of Human Rights as part of the right to an adequate standard of living. Subsequently the right to food was included in Article 11 of the International Covenant on Economic, Social and Cultural Rights (ICESR). The ICESR states that “the right to adequate food is realised when every man, woman or child, alone or in community with others, has physical and economic access at all times to adequate food or means for its procurement”. In terms of Article 11 of the International Covenant on Social and Economic Rights:

1. The States Parties to the present Covenant recognize the right of everyone to an adequate standard of living for himself and his family, including adequate food, clothing and housing, and to the continuous improvement of living conditions. The States Parties will take appropriate steps to ensure the realization of this right, recognizing to this effect the essential importance of international cooperation based on free consent.

2. The States Parties to the present Covenant, recognizing the fundamental right of everyone to be free from hunger, shall take, individually and through international cooperation, the measures, including specific programmes, which are needed:

(a) To improve methods of production, conservation and distribution of food by making full use of technical and scientific knowledge, by disseminating knowledge of the principles of

nutrition and by developing or reforming agrarian systems in such a way as to achieve the most efficient development and utilization of natural resources;

(b) Taking into account the problems of both food-importing and food-exporting countries, to ensure an equitable distribution of world food supplies in relation to need.

South Africa's constitution recognises the right to food. In terms of Constitution of the Republic of South Africa Act 108 of 1996:

Section 27

(1) Everyone has the right to have access to –

(b) sufficient food and water

(2) The state must take reasonable legislative and other measures, within its available resources, to achieve the progressive realisation of each of these rights.

Section 28

(1) Every child has the right –

(c) to basic nutrition, shelter, basic health care services and social services.

McLaren et al. (2015) note that provisions on the right to food must be read in conjunction with section 25 of the Bill of rights especially the provisions on land reform. Access to land is a key aspect of the right to food. Land is an important resource for agricultural production and the support of livelihoods. Smallholder farmers with access to land may produce food for household consumption and some marketed surplus. In spite of the Constitutional recognition of the right to food, food insecurity and hunger persist in South Africa.

6. Alternatives to the corporate food system

Different activist organisations, grassroots social movements and civil society organisations advocating for the right to food and food democracy have coalesced under the food sovereignty movement. While the concept of food sovereignty originated from the civil society formations and farmers affiliated to the international movement of peasant farmers, *Via Campesina* (the *Peasants' Way*), it is now widely embraced by various social groups advocating for alternative food systems across the world and also features in public policy (Akram-Lodhi, 2015). However, the term food sovereignty means different things to different people. On the one hand, it may simply be used as a rhetorical device to campaign for food democracy. On the other hand, the term may be used to define radical and transformative changes to the corporate food regime (Akram-Lodhi, 2015). Akram-Lodhi (2015) identifies different pathways to food sovereignty¹¹. These are essentially radical and transformative strategies that may be adopted to effect real changes to the corporate food system. Some of these strategies include the promotion of agrarian reform, local food systems and agroecological farming. Drawing on the Akram-Lodhi (2015) schema, this section highlights some of the key elements of an alternative food system in the South African context.

¹¹ Akram-Lodhi (2015) identifies agrarian reform, managing land markets and agricultural surpluses, agroecological farming, local food systems, a pro-poor and gender-responsive state and global trade as some of the key avenues for contesting for alternative food system.

6.1. Agrarian reform

As McLaren et al. (2015) argue, access to land is integral to the realisation of the right to food. Land reform in South Africa has happened within the parameters of the corporate food system (Greenberg, 2015). Currently, a few large-scale commercial farms produce the bulk of marketed output in South Africa. The transfer of land to historically disadvantaged blacks has been very slow. The initial target to transfer 30% of land in the first five years of land reform was never met.

However, land reform has also shifted significantly from its pro-poor focus. Land reform increasingly targets medium-scale and large-scale commercial farmers. Small-scale farmers, mostly in the communal areas, the landless households, the land poor, farm workers, women and the youth are generally underrepresented in land redistribution.

Land reform policies in South Africa espouses gender equity as a primary goal. However, in terms of actual implementation, very few women have benefited through land reform. In land redistribution, available estimates show that only 23% of women obtained land through the programme. Rural production remains important in food provisioning for many households in the former homelands. Aliber et al. (in Aliber and Cousins, 2013) note that there are an estimated 4 million smallholder producers in South Africa located in 2 million households (Aliber and Cousins, 2013). About 200 000 of these small-scale farmers produce some surplus while the rest produce food for household food consumption (Aliber and Cousins, 2013). However, these farmers occupy small parcels of land. Some analysts have argued that land reform should prioritise the dynamic group of smallholder producers producing some surplus. These could potentially form a core group of food producers within localised and decentralised food economies.

6.2. Local food systems

Arguments for alternatives to the corporate food system have generally proposed localised food systems as a solution to the adverse impacts of corporate control of the food system. Liberalisation and deregulation policies promote corporate consolidation and control of the food system. Greater corporate control has seen the decline of local food systems in South Africa. On the one hand, supermarkets procure their supplies from large-scale farmers and by-pass local farmers resulting in declining farm incomes and production (du Toit and Neves, 2007). Large agribusiness corporations have also gained control of the agro-inputs sector and their profits are based on the rising costs of inputs. Supermarket concentration has also undermined the viability of municipal fresh produce markets which provide an important alternative market for smallholders (Crush and Frayne, 2011). The broader environment is generally not permissive to the emergence of localised and democratic food systems. Thus, decentralised, democratic and localised systems of food production and provisioning require more structural changes in the broader economy.

A key argument in proposals for localised food systems is the development of short supply chains and cultivation of direct links between producers and consumers. Short supply chains are proven to provide more economic benefits to producers since it eliminates intermediaries who capture most of the value in agriculture. Thus, local food systems are “rooted in particular places, aim to be economically viable for farmers and consumers, use ecologically sound production and distribution practices and enhance social equity and democracy for all members of the community” (Feenstra, 1997: 28). Localised food systems are seen as a viable alternative to the vertically integrated, corporate-driven value chains.

In some countries, there is evidence of vibrant, albeit not perfect, local food systems that deliver the food on a daily basis and at a scale that meets the needs of local food eaters (Wegerif and Hebinck 2016:14). In Dares Salam, a multitude of small-scale and interdependent actors produce food for urban consumers at city feeding scale without relying on large vertically and horizontally integrated corporate structures (Wegerif and Hebinck 2016:14). Wegerif and Hebinck (2016) argue that this is essentially a symbiotic food system whereby small-scale entities depend on 'common pool resources', reciprocity, interdependence to supply food at scale to a growing urban population.

Localised food systems are associated with a reduction in food miles or the distance food travels from production to the point of sale. Eating locally produced foods reduces the ecological footprint and minimises the adverse impacts of agriculture on the environment. However, others have argued that consuming locally does not automatically translate into consuming sustainably given that some local producers may still rely on ecologically unsustainable methods of farming (Shindelar, 2015). Local food systems immensely benefit smallholder producers. With short supply chains, farmers are able to dispose of intermediaries and handle storage, packaging, transportation and distribution of farm produce. The reduction in packaging and processing of food within the food system also contributes to a reduced carbon footprint (Shindelar, 2015).

Localised food systems are also a great advantage for consumers. It becomes easy for consumers to 'access information about the origin of and methods used to produce a food product and to make more informed decisions'. In short, consumers in localised food systems can easily identify and choose products based on their social, ecological and economic impact of the product on the local community and environment. This enables consumers to access environmentally friendly foods and support ecologically sustainable agricultural practices. However, large food companies have also tended to adopt local food initiatives in order to avert competition from these growing alternatives.

Local food systems are also subject to different societal inequalities and divisions which may include class, gender and racialised privilege. Localised food systems should not be viewed as more democratic and equitable at face value. A key argument is that local food systems offer greater scope for local action and are more manageable (Akram-Lodhi, 2015). A key question remains, however: how can local food systems be fostered in environments already dominated by highly concentrated corporate systems characterised by tight vertical integration, on the one hand, and the extent to which Dares Salam's history can be drawn on to shape the emergence of a decentralised and interdependent food system?

6.3. Agro-ecological farming

Agroecological farming is increasingly being adopted as an alternative to the ecologically unsustainable and environmentally unsustainable industrialised farming. It is also seen as a means to achieve food sovereignty. The African Centre for Biosafety (ACB) argues that:

Agroecology is a food production system that is equitable and just, offering decent livelihoods, healthy environments and food, all stemming from collaboration with nature, and based on a wide variety of knowledge systems, including indigenous knowledge and the latest science and technology (ACB, 2015:7).

Some of the key ideas identified with the agroecological approach include the following:

- (a) Agroecology promotes less reliance on external inputs. This also entails the use of indigenous local seed varieties as opposed to mostly genetically modified seed varieties

produced by large private corporations in the seed industry. Expensive agro-inputs also result in high levels of farmer indebtedness.

(b) The agroecological approach is largely premised on the argument that small-scale family farms are more productive than large-scale industrial farms. Small-scale farms utilise family labour and are characterised by low labour supervision costs compared to large farm enterprises which are reliant on hired labour.

(c) Small-scale farming systems are generally considered to be more resilient to climate change. Small-scale farmers often rely on 'complex and diversified cropping systems' which allow them to cope with drought and climate-related shocks. Hybrid maize seed varieties are often less resistant to drought while local seed varieties for millet and sorghum are associated with 'low productivity declines during a drought' (Altieri, 2009).

(d) In some instances, agroecological methods are also associated with minimal use of chemicals and often make use of organic farming methods. This ensures access to healthy and uncontaminated food.

In the South African context, the African Centre for Biosafety (ACB) notes that agroecological approaches are "at variance with the way the agricultural sector and related value chains are currently organised and operate, in which farmers must be able to compete at economies of scale to feed into an industrialised food system" (ACB, 2015:7). The ACB (2015) also notes that there is an absence of appropriate policies to promote agroecology as an alternative in South Africa. Various policies that could potentially promote the nascent agroecological farming sector in South Africa are yet to be finalised. These include the National Agroecology Strategy, the National Organic Policy and the National Strategy for Indigenous Food Crops (ACB, 2015). In addition to lack of appropriate policies, there is generally lack of government funding for agroecology (ACB, 2015).

Some analysts have argued that debates on agroecological approaches and food sovereignty need to prioritise the productivity question (Bernstein, 2014). The key issue is whether farming systems "geared towards self-provisioning (and autonomy), can provide those who are not food growers, the majority of the world's population today, to satisfy the food security" (Bernstein, 2014: 2052). Where surplus is produced, critical questions on food distribution remain; for instance, how will that surplus reach non-farmers and on what terms? (Bernstein, 2014:1054). Within a capitalist economy, many people who form part of the surplus population are essentially net food consumers, often dependent on the ecologically destructive farming models for cheap, albeit unhealthy foods. Where alternative food systems based on smallholder production models are introduced, there is need to consider the possibility of rising food costs and how an interventionist state may address the need to introduce subsidy measures to support the poor households (Bernstein, 2014).

Success of the agroecological approach is predicated on scaling up. According to Terán et al. (2018), it is important for an ever-greater number of small-scale producers to practice agroecology over ever-larger territories with more people involved in the processing, distribution and consumption of agro ecologically produced food. This will facilitate the creation of alternative food networks instead of reliance on corporate, profit-driven food networks. Thus, without a critical mass of farmers adopting sustainable agricultural practices, reliance on the corporate food system may persist.

6. Smallholder farming practices and markets dynamics

This section draws on data collected using google forms either remotely by telephone or in face-to-face interviews from small scale farmers in the Umgungundlovu District, KwaZulu-Natal (KZN), and the Vhembe and Capricorn Districts in Limpopo. The data was collected in KZN during fresh produce procurement from small farmers, whereas in Limpopo, it was collected in order to plan for the operationalisation of short value chains should food procurement budgets become available. The data in KZN was collected through a collaboration between the land rights NGO, the Association for Rural Advancement (AFRA), the Emlathini Development Organisation, which supports small farmers with conservation agriculture and the eMgungundlovu Economic Development Agency (UMEDA), a parastatal organisation aimed at promoting economic development in the district. The aim of the data collection was two-fold: to provide a profile and better understanding of small farmers in the KZN and Limpopo Districts, and to begin to map where they are and how they participate in the food chain.

6.1. Age and gender of smallholder producers

In terms of age distribution, 36.2 % of farmers fall within the 40-49 age cohort while 32% are within the 50-59 age group (see Table 2). There are very few young farmers in the selected sample of farmers.

Table 2: Age distribution of smallholder producers (n=58¹²)

Age	No. of farmers	% of total
20-29	1	1.7
30-39	4	6.9
40-49	21	36.2
50-59	19	32.8
60-69	9	15.5
70-79	3	5.2
80 +	1	1.7
Total	58	100

Evidence from this survey shows that women constitute the majority of the farmers in the survey. Women tend to play a prominent role in smallholder agriculture mostly because they are primarily responsible for household food provisioning. Historically men have been involved in wage employment as migrant workers while women have, by default, been primarily responsible for farming in the rural areas. Research on smallholder farming shows that women dominate smallholder cultivation in most areas.

Table 3: Gender of smallholder farmers (n=78)

Gender	Number of smallholder farmers	% of total
Female	53	67.9
Male	25	32.1
Total	78	100

¹² The study sample consists of 78 smallholder producers. However, the survey results are based on the number of available responses from the smallholder producers. For instance, In this case, only 58 smallholder producers reported their age (see Table 2).

6.2. Farming practices of smallholder producers

The research gathered insights on farming practices to develop an understanding of the smallholder farming practices (see Table 4). This includes data on choice of seeds, use of fertilisers, pest control measures and access to water or irrigation. From the survey data, the majority of the smallholders reported that they purchase vegetable seedlings or seed from retailers (91.3%) although a sizeable number of smallholders also grow some of their seeds (78.3%). There is also evidence that a significant proportion of the surveyed smallholder producers use agro-ecological farming methods. These include the use of organic fertilisers or manure, making of their own compost and use of natural remedies for insect and weed control.

Table 4: smallholder farming practices (n=69)

Farming practices	No of responses	% of total
I purchase vegetable seedlings or seed	63	91.3
I grow vegetables from my own seed	54	78.3
I use organic fertiliser/manure	51	73.9
I grow produce in open fields/garden	49	71
I make my own compost	44	63.8
I use natural remedies for insects and weeds	34	49.3
I have an irrigation system	34	49.3
I have a borehole	20	29
I use chemical fertilisers	19	27.5
I use chemical pesticides	17	24.6
I have municipal water	14	20.3
I water with hand buckets	11	15.9
I use chemical herbicides	10	14.5
I use chemical fungicides	10	13

However, some smallholder producers reported that they use chemical fertilisers, pesticides, herbicides and fungicides particularly in field production. This raises questions around food safety although many of those who do use chemicals reported that they withdraw the chemicals for a period before harvesting.

Pesticide residues in the food chain pose a significant public health risk. Organochlorine pesticides (OCPs) which include aldrin, dieldrin, endosulfan, dichlorodiphenyltrichloroethane (DDT), hexachlorobenzene (HCB) and hexachlorocyclohexane (HCH) have long toxicity lifetimes. Research sampling produce from open markets in Johannesburg identified OCP exposure significantly above legally permitted and toxicological accepted levels. (Nuapia et al., 2016).

There have been attempts to regulate good agricultural practices (GAP), including the certification of smallholder producers of fresh produce through the SA-GAP certification programme (DAFF and PPECB, 2016). This certification is a non-negotiable requirement if smallholders seek to sell into supermarket and export value chains. This requires that producers keep records of all agrochemicals used and seeks to regulate their use to establish acceptable Minimum Residue Levels (MRL). These records, which are audited, cover a wide range of factors including the application rates of agrochemicals per crop, the number of treatments and the pre-harvest interval when no treatments are permitted. The latter varies according to the agrochemical in use. In the main however, the costs and infrastructure thresholds required to obtain and maintain SA-GAP certification are prohibitive and effectively exclude all the but the most established of commercial smallholder producers.

This means that informal fresh produce value chains are unregulated. There are few, if any oversight mechanisms or popular food safety protocols guiding small scale producers who sell produce at the farm gate or supply hawkers, spaza shops and local greengrocers.

In the context of Covid-19 pandemic strict protocols are required from the farm through to the point of sale and consumption to eliminate or reduce the risk of coronavirus contamination of food surfaces and food packaging materials. (FAO and WHO, 2020). The extent to which small scale producers, hawkers and retailers are able to implement these procedures and the risk of transmission through contact with open food have yet to be assessed. A small number of farmers in the survey reported that they wear masks when harvesting produce and provide water and soap to purchasers who come to the farm. However, the data collectors did not see any evidence of these practices, although social distancing was practiced.

Although some of the interviewed farmers rely on borehole water, nearly half depend on irrigation and thus pumps in order to access water for farming. The surveyed households produce marketed surplus and sell a wide range of vegetables. At the time of the survey, those smallholders marketing their produce were mostly selling the following crops: spinach (46.8%), sweet potatoes (33.8%), tomatoes (28.6%), mustard (19.5%) and green maize (16.9%).

6.3. Crop diversity in smallholder farming systems

The survey documented the fresh vegetables produced by the selected sample of smallholder farmers (Table 5). Survey data shows that the smallholder producers grow a wide range of vegetable crops. The most widely grown vegetable crop is spinach (68.8%), followed by green maize (64.9%), onions (48.1%) and sweet potatoes (41.6%).

Table 5: What fresh vegetables do you grow in the course of the year (n =77)

Fresh vegetables produced	Number of household producers	% of total
Spinach	53	68.8
Green maize	50	64.9
Onions	37	48.1
Sweet potatoes	32	41.6
Beetroot	30	39
Pumpkin	30	39
Butternut	26	33.8
Carrots	25	32.5
Peas	22	28.6
Potatoes	18	23.4
Green, red and yellow pepper	16	20.8
Cucumbers	12	15.6
Chillies	12	15.6
Amadumbe	9	11.7

What can be surmised from these patterns is that diversified cropping systems are a key element of farming practises amongst the surveyed smallholder farmers. However, different crops are produced in different farming seasons and areas. Growing a diverse range of crops allows smallholder producers access to fresh produce across different growing seasons, for both consumption and sale.

6.4. Fresh produce surplus

The survey gathered data on fresh vegetable sales by smallholders. It is clear that the smallholder producers have a wide variety of vegetables available for sale (see Table 6). Nearly half (46.8%) of the farmers had spinach available for sale. Others indicated that they had the following crops available: sweet potatoes, tomatoes, mustard, green maize and cabbage.

Table 6: What fresh vegetables do you currently have for sale? (n=77)

Vegetable crop	No. of smallholder producers	% of total
Spinach	36	46.8
Sweet potatoes	26	33.8
Tomatoes	22	28.6
Mustard	15	19.5
Green maize	13	16.9
Cabbage	10	13
Pumpkin	6	7.8
Potatoes	6	7.8
Butternut	5	6.5
Onions	3	3.9
Dry beans	3	3.9
Carrots	2	2.6
Beetroot	2	2.6

However, few farmers reported to have the following crops available for sale: pumpkin (7.8%), potatoes (7.8%), butternut (6.5%), onions (3.9%), dry beans (3.9%), carrots (2.6%) and beetroot (2.6%).

6.5. Packaging of fresh produce

In the survey, the majority of farmers (62.8) reported that they do their own preparation and packaging (Table 7). A small proportion of farmers indicated that while they prepare and pack their produce they still need assistance to improve the handling and packaging of their produce.

Table 7: Is the farmer able to prepare and pack fresh produce (n = 78)

Preparation and packaging	Number of smallholders	% of total
Yes	49	62.8
Yes but will need assistance with packaging	9	11.5
No	19	24.4
Use bags and crates	1	1.3

However, 24.4% of the smallholder farmers reported that they have no capacity to prepare and package their own produce. Preparation also requires weighing and measuring produce for the market. Most smallholders use local measures such as crates and drums to measure their produce rather than scales with kilogram units. This makes price comparison across different farming systems and scale difficult.

More research is needed to better understand how smallholder producers price their goods. This is complex as there are no uniform metrics in use, although there may be commonalities in the units of measure in particular localities. Anecdotal evidence suggests that producers monitor prices in local

supermarkets and set their own prices so as to be competitive. Lack of available records makes it difficult to calculate producer margins. A parallel research process investigating availability of mobile phone applications (apps) to link small producers into local markets and shorten value chains examined how fresh produce prices are set and adjusted by location. Digital trading and auction platforms estimate indicative ruling prices based on data from Technofresh¹³ which synthesises fresh produce pricing data from 17 fresh produce markets. In trying to calculate fair prices to offer to small farmers when procuring fresh produce, LandNNES drew on local retail prices drawn from online supermarket shopping apps in combination with local knowledge of price variations amongst team members.

Fresh produce is perishable and often requires proper handling to minimise post-harvest losses and to ensure food safety. Lack of proper handling and packaging of fresh produce can adversely affect the quality of produce and may potentially reduce earnings.

6.6. The predominance of informal markets

Most farmers sell their produce within their local communities. This demonstrates that there are short distances between the farmers and the consumers (Table 8). The farmers also market their produce through the bakkie traders (48.1%). In KZN these bakkie traders travel from eThekweni metro to procure produce from farmers in Umgungundlovu, some 90 to 130 kms away. A relatively small proportion (26%) of the smallholder farmers market their produce through supermarkets. This shows that the farmers surveyed in this research are not simply involved in subsistence agriculture for household consumption. They also produce surplus and sell most of their produce in ‘informal’ markets.

The very small proportion of farmers selling to schools (7.8%) suggests that Government’s Radical Agrarian Socio-Economic Transformation Programme (RASET), which is supposed to procure 20% of school feeding scheme inputs from small farmers, is not working according to plan. Possibly this relates to how onerous the SA-GAP certification requirements to ensure public health safety described above are for smallholders to comply with. Other State procurement channels, such as for hospitals and prisons, do not feature in the survey findings at all.

Table 8: where do you sell your produce (n =77)

Type of market	Number of smallholders	% of total
Local community	75	97.4
Bakkie traders	37	48.1
Informal trader market stalls	31	40.3
Supermarkets	20	26%
Schools	6	7.8
Municipal fresh produce market	6	7.8
Spaza shops	3	3.9
Other	2	2.6

¹³ Pricing as 1 July 2019

Registration fee: R160.00 once off. (R184.00 incl VAT)

Monthly user fee: Supplier / Producer R200.00 per month. (R230.00 incl VAT) or Non-producer / Agent / Buyer R370.00 per month. (R425.50 incl VAT)

Other studies have confirmed the importance of informal marketing systems for smallholder producers in South Africa. Essentially, informal markets are “loosely organised value chains that are poorly documented and largely ignored by policy makers” (Cousins, 2015:8). In fact, policy makers often see these “informal distribution networks as a product of neglect and marginalisation that should eventually be eliminated and replaced with a modernised distribution system based on the logic of capital” (Greenberg, 2013:2). This brief profile suggests, on the contrary, that smallholder producers play a key role in the food system through supplying bakkie traders, street hawkers and spaza shops, and that particularly during COVID-19 lockdown were vitally important to shoring up food security at community level.

7. Conclusion

Developing alternative food systems requires both incremental and far-reaching structural changes. The prevailing structure of the economy presents significant obstacles to the development of localised and democratic food systems. Large-scale commercial farms reliant on industrial methods of farming dominate South Africa’s agrarian structure and produce the bulk of South Africa’s agricultural output, although data on smallholder systems and contributions to food availability is relatively lacking. Evidence shows that the food system is highly concentrated with a few powerful private corporations controlling the entire food system – from production, input supply, food processing, distribution and retail sectors of the food system. Smallholder producers have struggled to remain competitive. Rising costs of inputs and declining farm gate prices have seen the decline of smallholder producers. Supermarket chains also procure from large-scale commercial farmers through centralised distribution centres, sidelining small-scale farmers.

The corporate food system is often seen as the appropriate model for addressing food security problems given the growth in food supplies associated with this model. However, there is growing evidence that food insecurity and hunger have become prevalent. Food availability at national level does not readily translate to food security at household level. The long supply chains associated with the corporate food system have proven to be vulnerable to major shocks especially during times of crisis. The food shortages during the national lockdown revealed some of these constraints while also making visible the important role of smallholders in community-level food security. Unhealthy, processed and cheap foods have also been linked to widespread malnutrition and undernutrition. In addition, diseases related to unhealthy diets, for instance, obesity, diabetes and cardiovascular complications are also prevalent.

Some key strategies in promoting local food systems will need to focus on pro-poor and equitable land reform. Smallholder producers should be the target beneficiaries of land reform especially women given their prominent role in small-scale farming and food provisioning. Developing local food economies requires sustained support for local markets. In South Africa, municipal supported markets and rural trading stores for instance have historically provided key markets for smallholder producers. ‘Informal’, often ‘invisible’ markets continue to channel the bulk of the produce from the smallholder sector. Much of the focus in policy has been on integrating smallholder producers into the tight value chains. However, ‘informal’ markets if allowed to thrive, together with limits on the amount of fresh produce retailers should be allowed to sell, could provide sufficient quantities of food to urban populations, for instance.

Policies on agroecology and organic production need to be finalised. Without fully-fledged policies on agroecology, it will be difficult to promote environmentally sustainable approaches to farming and ensure that these methods are widely adopted. Funding and prioritisation of these key areas is



also key. Finally, progressive state interventions are necessary in order to transform the governance of the food system and create space for alternatives to emerge. State interventions are also in relation to global trade and how it impacts on the local food system.

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