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# State of the City Food System Report

## Cape Town

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# LINCS Value Framework

| | **Learning** | **Inclusivity** | **Novelty** | **Collaboration** | **Sustainability** |
|---|---|---|---|---|---|
| | The project stresses the value of experiential learning and that multiple ways of knowing are welcomed, deemed of equal value, and can be connected to enhance understanding. *"NEA ONNIM NO SUA A, OHU" - "He who does not know can know from learning"* | and deliberate engagement and empowerment of communities will enhance their agency and participation in decision-making for a people-centred and informed research, policy and practice. *"FUNTUNFUNEFU-DENKYEMFUNEFU" - "Unity in diversity"* | represents the embracing of the new or unexpected, which necessarily requires diverse expertise, skills and perspectives. It includes the dismantling of inappropriate systems in favour of traditional or indigenous practices. *"UAC NKANEA" - "UAC lights" symbolises technological advancement.* | To successfully ensure transdisciplinary work, societal actors must be continuously engaged to co-define the research objectives and questions, and to continuously contribute to meaning-making with the researcher as the research progresses. *"BOA ME NA ME MMOA WO" - "HELP ME AND LET ME HELP YOU".* | is articulated both as the overarching global imperative to ensure economic, environmental and social wellbeing, and as the ethos that every project intervention must aim to become self-sustaining. *"SANKOFA"- The backwards turning bird symbolises returning while looking forward* |
| **How does this deliverable contribute to each of the values?** | This has involved a deep learning process connecting food systems understanding to urbna systems understandings | The report entailed less engagement and a surface review but consultations with diverse stakeholders will now take place | This is one of the first reviews to connect urbna systems and food systems knowledge and to assess the food system of a city as embedded in both the urban, the policy and the infrastructural contexts | This work involved convening different food systems knowledge specialists. More collaborative work will commence with this report service as the site of conversation | This report serves a key sustainability position. The wealth (per a broad definition) of society is embedded how society functions and that is embedded in context and the environment. The intersections between these sphere also needs mediation and governance. This report seeks to understand this process as a primary entry point to ongoing food system engagement. |
| **How did you practice this value in this deliverable?** | Through the initial brief and active engagement through the development of the report. | This process built the foundation for more inclusive conversations with diverse actors who impact the food system across the city | This report is novel and pushed researchers to engage diverse systems at the urban scale – food, urban, governance, health, policy, politics, etc. | This report was collaborative in terms of how it brought researchers together. However, it is a key tool upon which collaborative processes are now built | This report sought to offer greater understanding about the intersections of the three spheres and how these are mediated through the sphere, who governs these processes and how these enable or constrain outcomes. |

# 2. Abstract

The State of City Food System review is a first attempt to capture the state of the food system but as this relates to the wider City of Cape Town Food System. Despite the fact that Carolyn Steel argued that the best way to understand a city is through its food[1], the food system of most African cities has always been viewed as separate to the wider and often more evident urban food processes from planning to the economy, from by-laws to governance structures. This report is novel in that it seeks to challenge these "food as separate" views by actively engaging the food system of a city, but through an account of multiple other city functions and factors. This report seeks to recentre the city food system as a central and core consideration of the city, after all, as one of the trail blazers seeking to urbanise food, Wayne Roberts argued, "a city is what it eats".[2] This report focuses on a number of non-food system related aspects. This focus is informed by the question asked in a recent Food and Agricultural Organisation report questioning "what happens when the food and urban systems intersect at the city scale?" In an attempt to engage this, and aligned to the objectives of the AfriFOODlinks project, to take stock of existing data, knowledge and perspectives of immediate need, while actively seeking overlooked and under-utilised urban food systems knowledge by undertaking urban food system landscaping and situational analyses that span key urban systems (food, health, socio- economics, urban/infrastructure services). The reviews seek to gather and engage existing published knowledge, drawn from food and nutrition system assessments, stakeholder mapping, retailer mapping, engaging urban food policies, programmes and strategic plans across government scales, through literature, both nonfiction and fiction, on the cities. The objective is to begin building an understanding of both what is known about the urban system and the urban food system, but also, what is not known about both the urban and urban food systems of those cities. This report starts this process. It spans multiple and at times contradictory sources of evidence, spanning dates and scales. The report does not purport to be complete or comprehensive. It is, however, a stake in the ground from which existing knowledge can be tested, verified and deepened. It is a foundation for the wider process of engaging in, activating and questioning the food system of Cape Town. It is also an initial attempt to understand the intersections between the urban systems and the food systems of Cape Town. Currently, as will be noted in the report. These connections are at times made in reference to food, but these are NOT made in reference to how other city functions ,from governance to infrastructure, impact food system outcomes. The need for change is urgent as highlighted in this report through an account of the extremely high state of food insecurity, and all forms of undernutrition. The report is perhaps poorly named as despite being an account of the state of the urban food system, it is also a state of the urban system report. It is hoped that this report will offer the necessary tools to ensure that at the conclusion of the AfriFOODLinks project, an account of the urban system is embellished, and rich in accounts that speak directly to the state of the city food system.

[1] See: https://www.carolynsteel.com/hungrycitybook and Steel, C. (2013). Hungry city: How food shapes our lives. Random house.
[2] Roberts, W. 2001. 'The Way to a city's heart is through its stomach: Putting food security on the urban planning menu', Crackerbarrel Philosophy Series, Toronto: Toronto Food Policy Council

# 3. Introduction

As detailed in the abstract, this report is aligned to the objectives of the AfriFOODlinks project, to take stock of existing data, knowledge and perspectives of immediate need, while actively seeking overlooked and under-utilised urban food systems knowledge by undertaking urban food system landscaping and situational analyses that span key urban systems (food, health, socio- economics, urban/infrastructure services). The reviews seek to gather and engage existing published knowledge, drawn from food and nutrition system assessments, stakeholder mapping, retailer mapping, engaging urban food policies, programmes and strategic plans across government scales, through literature, both nonfiction and fiction, on the cities. The objective is to begin building an understanding of both what is known about the urban system and the urban food system, but also, what is not known about both the urban and urban food systems of those cities.

The report is structured in a manner that might appear contradictory in that it argues that it is essential to integrate food and urban systems when engaging urban food systems transformation. However, despite this lofty goal, the pragmatism needed to facilitate this integration means that before seeking integration and seeking the city through a food systems lens, we first need to understand the other urban systems far better. For this reason, the explicit starting point of the State of City Food System report has been to capture data on the multiple urban systems that intersect with and in most instances play a fundamental role in determining the urban food system outcomes. For this reason, this report seeks to gather information on the state of both food and nutrition in the city. These are detailed as separate but later combined, given the fact that different government departments are responsible for food and nutrition, in the case of Cape Town, as with many other cities in the wider AfriFOODlinks project, neither such department is a city department. The report also captures information of stunting and wider food system governance efforts in the City of Cape Town. In the case of Cape Town, the Provincial Department of Agriculture has an explicit food security mandate. While the City of Cape Town has a health department, the overarching health mandate lies with the Provincial Department of Health. However, as Jaap De Visser has made clear, despite the perception of an absent mandate, all spheres of government have a Constitutional obligation to ensure the Right to Food, and the aligned childhood Right to Nutrition and the Right to Health.[3]

The report also offers a sense of both the political and administrative leadership of the city and how this has evolved over time, specifically following South Africa's transition to democracy in 1994. If engagements with city officials are planned, knowing and understanding the evolution of mandates and responsibilities was deemed essential.

In popular culture the term follow the money is often overused but in the case of any government and local government actions, understanding fiscal allocation and what feeds those fiscal allocations is essential For this reason, this report also documents the state of the economy in the city, the dominant economic sectors and the interplay between the formal and informal sectors. In addition to this, the report also acknowledges the high levels of inequity in South Africa and as a result, seeks to avoid engaging only in understanding economic activities while overlooking, even disregarding, those excluded from such economic activity. For this reason, the report also engages in the social protection systems evident in Cape Town, from the grant system to school feeding.

No city is an island and activities in the present, including the culture of the city, are informed by their history. As a result, this report delves deeply into the contested history of the city, drawing on the nuances of this history to later engage the cultural nuances and diversity of the city as evident through its different food traditions and cultures. The report actively engages the fact that the history and the understanding of the history is both limited, given that much of the history prior to the arrival of Europeans was occluded from historical accounts as a result of racist narratives and positions. Further, despite a transformation process to purge such racist narratives, many have become normalised and so while this report made every effort to ensure a wider reading of history was engaged, it does acknowledge that some voices and the

[3] See: De Visser, J. (2021). Food security, urban governance and multilevel government in Africa. *Land issues for urban governance in sub-Saharan Africa*, 269-280; and De Visser, J. (2019). Multilevel Government, municipalities and food security. Food Security SA Working Paper Series No.005. DST-NRF Centre of Excellence in Food Security, South Africa.

histories of certain groups may not be adequately accounted for in the historical accounts. This will be corrected as these voices are better "heard" as the project evolves.

The report then seeks to further support the wider AfriFOODLinks project and in doing so folded into this report is an engagement in the processes associated with multi-stakeholder food systems governance and pluralistic governance structures evident in the city, specifically those seeking to engage in and better understand the food system. The report also seeks to engage the urban agri-food system and the entrepreneurial activities evident, or not, in that system.

Given the wider report focus that seeks to understand the urban food system as this system intersects with the urban system, attempts are made within this report to engage in and capture the food environments of the City of Cape Town and what this might mean for nutrition and health outcomes.

These different components of the report retain their specific focus and are separate entities within the report. An initial attempt was made to summarise and integrate these aspects but this was stopped. There are a number of reasons for this. The first is that we returned to the initial idea of this report as being a "State of the Food System" report. Secondly, as the AfriFOODLinks project evolves, new lessons, mistakes, different knowledges, and different rationalities will surface. We sought to avoid the concept of assuming we could synthesize such complex issues without the detailed engagement that will follow as part of the AfriFOODLinks work. We needed to avoid falling into the same top down traps that the wider AfriFOODlinks knowledge project is seeking to avoid. Additionally, one of the key lessons from the State of Knowledge review is that these are currently contradictory knowledges at play. As an example, we recorded nine different food security reports. Three made use of FANTA tools, two made use of FIES tools, one made use of an amended FIES tool. One made use of SDG measurements (despite their rural focus), one made use of DQQ tools and one was qualitative in nature. Each reported a different scale of food insecurity, each engaged different scales and while some noted their representivity limitations, over half claimed to be representative. As authors we were left wondering which was correct, or perhaps, were all correct? These questions were evident in other areas where data on one aspect was pre COVID, while data on another aspect was from post COVID. Intuitively given the impact of COVID, we were concerned that attempts to compare these different data aspects would offer an outcome but what would the value of such an outcome be given the significant disruption that COVID created. The strategy in this report has been to avoid making overly naive comparisons or assumptions as to correctness. Our approach has been rather to capture the information that is currently known, doing so with the appreciation that the origin of that information might be biased (overly promotional if City authored, as an example). Additionally, without detailed in depth interviews, a process planned for later in the project, truthing data is also not possible.

For these reasons, this report offers a state of information as collected from diverse and at times contradictory sources. This information is intended to serve as a foundation of known information about both the urban system and the food system so as to capture, for later interrogation and analysis, the areas of intersection between the urban system, the urban food system, the food system and the multiscalar governance systems.

# 4. Scope of the City Report

This report is made up of seven sections. The first offers an overview of the City of Cape Town, describing the locality, the demographics, climate, infrastructure and economy of the city. The report then pauses and describes the history of the city with specific and deliberate focus on a number of food related aspects that are folded into the history of Cape Town. The report then describes the governance histories and foregrounds this before detailing the governance structure and political and operational structures of the City. This is then followed by a detailed discussion on the economy of the city and the infrastructure of the city.

Food and nutrition security are then discussed spanning food security and nutrition outcomes while at the same time engaging in discussions on the state of the nutrition transition and an account of vulnerability and associated responses.

The report then offers baseline information on a number of food system related activities, detailing the food system stakeholders, the policy environment, the production environment and the nature of the urban food basket with commentary on the drivers and determinants of such a basket. The report also details the food economy, engaging both formal and informal aspects. The third section engages multi stakeholder governance processes while the fourth section engages the agrifood value chain and entrepreneurialism. The sixth section offers detail on the food environment while the seventh section of the report attempts to capture aspects of the Cape Town food system not captured in the preceding sections, specifically oftentimes unseen food system aspects.


A typical diet for many urban residents in Cape Town - what drives this choice? Is it knowledge, infrastructure, costs, taste, a desire for an urban diet? Is it all of the above? What informs choice, and how does the intersection between the urban system and the food system influence this choice? Image not for reuse

# 5. The City – Cape Town

## 5.1. Geographic location, demographics and contextual factors

### 5.1.1. Location and context

Cape Town is the second largest City in South Africa. In 2021 the Western Cape Government reported Cape Town's population, the Cape Town Municipal Area per the 2000 Cape Metropolitan Area designation, to be 4 758 433 made up of 1 303 988 households (PGWC, 2021). This population size and its spatial relationship can be contextualised by the fact that the population density of the Western Cape Province is 55 persons per km$^2$ while for Cape Town, this is 1 915 persons per km$^2$ (PGWC, 2021), with significant variability in density being experienced, with informal areas being extremely dense while wealthier suburbs far less so. When compared to the demographics of the largest city in South Africa, Johannesburg, Cape Town remains slightly smaller. Johannesburg has a population of just over 6 million residents,, but is also the economic hub of the country.

Cape Town is located on the south western tip of Africa and serves as one of four key gateways to the interior of the country. Figure 1 represents the differentiation between metropolitan and administrative Cape Town (Figure 1: bottom left) versus the municipal area of Cape Town (Figure 1 bottom at centre). Figure 1 also depicts Cape Town within the cluster of larger national urban metropolitan areas where Cape Town is located on the coast to the South West and is one of five large metropolitan areas (and clustered with a further three large intermediary cities) (Figure 1: top left). Cape Town's location within the Western Cape Province is detailed in Figure 1 (top centre and right) and depicts Cape Town's connectivity to other urban areas and its relationship with the wider topography, where the symbiotic relationship with provincial economies create mutual benefit for both the City and Province. Lastly, adjacent to Cape Town are a number of smaller secondary or intermediary towns and centres. Cape Town and these towns all have a symbiotic relationship with one another and rely on and support the ultimate success of one another. These towns include the central winelands town of Stellenbosch, the wineland towns of Paarl and Worcester, Wellington, Saldanha Bay, and key agricultural areas of Caledon and Malmesbury. These urban areas within the Western Cape Province and their associated primary industries, mostly agricultural based, in the case of the winelands and interior towns, and a secondary export port for minerals (Saldanha Bay) all contribute to the wider regional economy (See Figure 1: bottom left). While these towns are administered by their own councils and structures, there is mutual reliance on one another and Cape Town.

In this report, the focus is explicitly on Cape Town and the Cape Metropolitan Area but readers should keep in mind that flows or resources, material. capital and human, all contribute to a wider regional and global economy on which Cape Town rests.

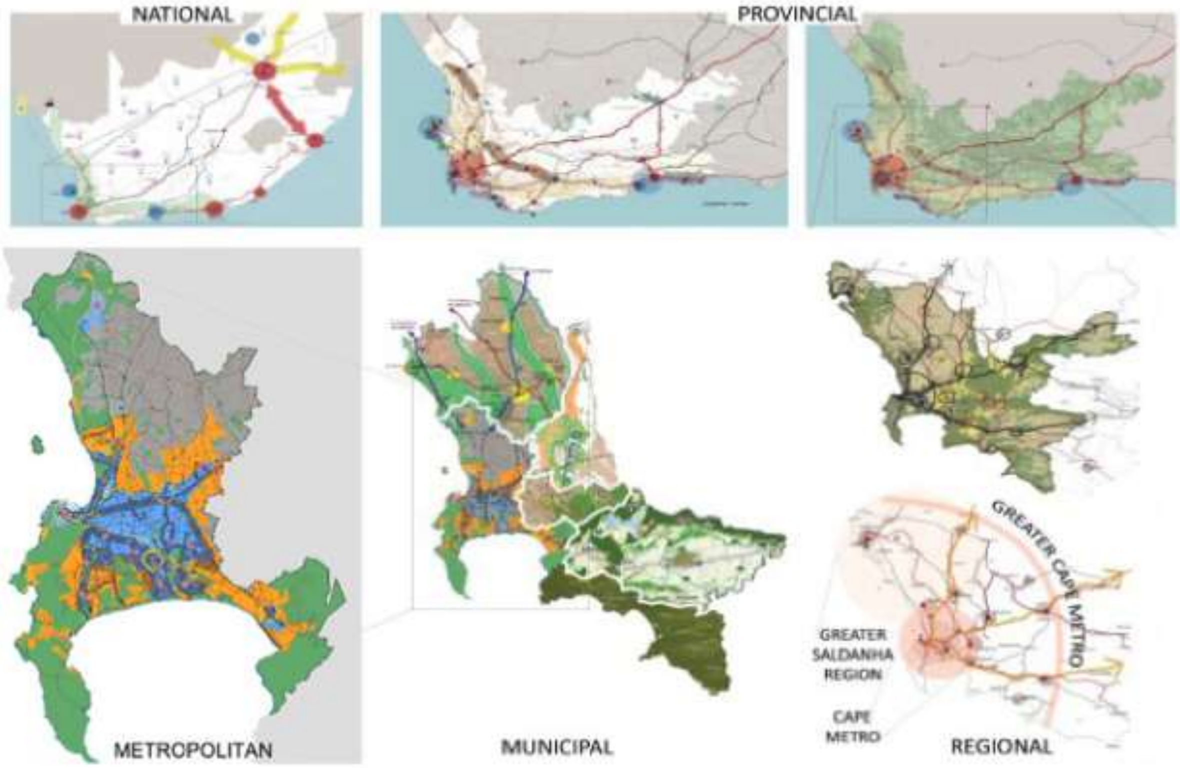


Figure 1: The Cape Metropolitan Area embedded within the wider regional and national networks (Source: City of Cape Town, 2022)

Two distinct geographical terms are used interchangeably to denote the Cape Town area. Cape Town as an administrative region includes the urban areas, but also includes rural areas that fall within the boundary of the Cape Metropolitan Area (CMA). Unless referred to specifically as Cape Town Urban – the area falling solely within the urban edge – all references to the City of Cape Town (CCT) refer specifically to the administrative region, the CMA

This is the region over which all City governance processes have jurisdiction.

This area is detailed in Figure 2 where the City of Cape Town boundary incorporates the urban areas, where the dark lines, encircling the coloured areas, denote the urban edge and the light dotted lines reflect the extent of the City of Cape Town jurisdiction, the administrative boundary (the CMA - referred to in this document as the City of Cape Town or CCT). Figure 2 also offers insight into the extent of change and increases in density over the past 10 years.

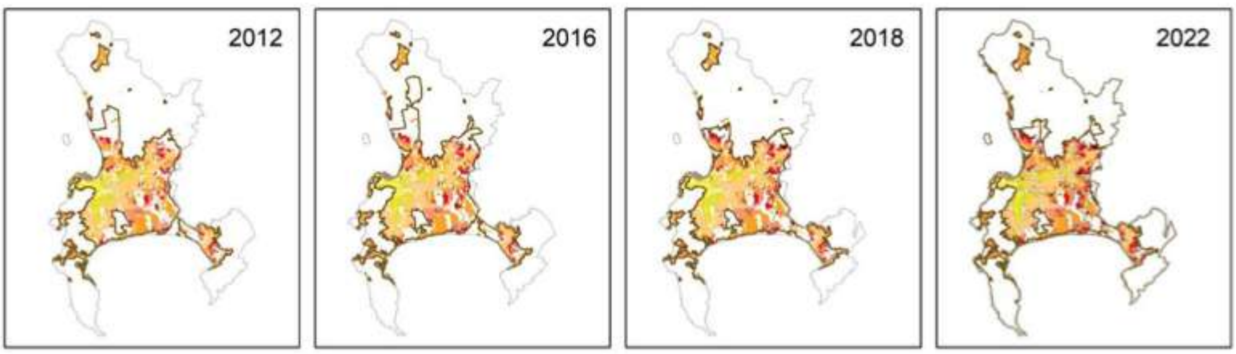


Figure 2: Recent built environment growth (Source: City of Cape Town, 2023)

The City of Cape Town remains entrenched in an apartheid city typology with exclusion and significant inequality present. Interestingly,  Figure 2 offers insight into changing planning approaches. Currently (as of 2022) there is a distinct strategy to attempt to densify the city. This is evident in both the 2012 Densification Strategy, but also, a clear strategic focus of the City of Cape Town Spatial Development Framework. The reasons for this are diverse but managing infrastructure costs is arguably the key driver of this. Addressing the racialized spatial legacies is also argued to be a key motivator for this. Some evidence of this can be noted in the 2016 map reference in Figure 2 where expansion in elite developments were planned and approved, but later challenged and removed (as evident in the northern section of the 2018 map) in order to retain the densification strategy. Despite this, there is still significant development on the periphery of the city (red dots in all maps), with less new growth in the urban inner core. This new growth is largely in response to an increasing population.

### 5.1.2. Demographics

Cape Town has seen steady population growth and, by 2021, was home to an estimated 4,75 million people (StatsSA, 2021). However, the annual population growth rate is slowing. Cape Town's population is relatively young at present, with almost a quarter of all residents being below the age of 14. Yet the age make-up of the city is expected to change over time, with a growing proportion of people aged 65 and older. The old-age dependency ratio is projected to increase from 10% in 2021 to 14% in 2030, and to 18% in 2040 (StatsSA, 2021).[4]; [5]

There has been an increase in the number of households in Cape Town. Households grew from an estimated 1,07 million in 2011 to 1,46 million in 2021.[6] The Cape Town housing market, including both private and public housing developers, have lagged behind and not been able to meet  the demand for housing. The City of Cape Town suggests that this is the reason for "a growing number of informal dwellings in the city" (CCT, 2022). However, other stakeholders suggest that the slow pace is impacted by the slow release of land (Cogger & Park-Ross, 2022), skewed land prices and limited access to land for housing (Cogger & Park-Ross, 2022), competing interests and land speculation (Leitner  & Sheppard, 2022; Cogger & Park-Ross, 2022; Eidelman, 2021; Ferreira & Visser, 2007). Housing delivery was impacted by Covid-19, with shelter and housing dynamics, patterns and responses evolving. Access to well-located land remains a challenge. Micro-developers and small- scale property owners are increasingly playing an important role in housing delivery and provision, The City of Cape Town sees these actors playing an increasing role in providing additional dwellings and transforming erven to accommodate multiple housing units (CCT, 2022). This forms part of a wider densification strategy where spatial policies now actively seek to curtail the expansion of the city (CCT MSDF, 2023). It is yet to be seen what impact this will have on housing delivery. Housing in Cape Town is at a premium, compounded by a weak Rand resulting in second home purchases by international visitors, using foreign currency, and a "semigration" from other urban centres in South Africa as service delivery in these areas declines. This is further accelerated by the platform based housing market's (Airbnb and other short term rentals) increasing demand across many housing classes and types.

### 5.1.3. Climate and biodiversity

Cape Town's climate, natural assets and biodiversity, are part of what makes the city a unique tourism destination, but also offers significant employment and wellbeing opportunities (CCT, 2022). Besides being the city's most prominent and iconic natural site, Table Mountain is also a Strategic Water Source Area and critical for groundwater recharge. Cape Town has a coastline of over 300 kms, over 45 000 ha of accessible protected areas, which includes 21 City of Cape Town nature reserves,, and is one of only a few cities in the world with a national park within its boundaries (CCT, 2022).

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[4] The Old Age Dependency Ratio  represents the burden on the economically active part of the population to maintain those aged 65+

[5] These estimates draw on the StatsSA 2021 data but have been projected as a result of the City of Cape Town strategic growth projections.

[6] This figure is informed by the following: StatsSA 2021 mid-year population estimates, 2016 Community Survey and 2011 Census, Stats SA; City's own calculations.

Cape Town has two world heritage sites designated by the United Nations Educational, Scientific and Cultural Organisation (UNESCO) – Robben Island and the Cape Floral Region Protected Areas. The latter are in the world's smallest floral kingdom but one of the most diverse biodiversity hotspots.

In southern Africa, climate change projections suggest increased variability in rainfall, more frequent extreme events and increased temperatures (Hewittson & Crane, 2006). In Cape Town, a significant number of past disasters and events have been associated with weather conditions (DiMP, 2000). These events have arguably increased in intensity over the past decade where Cape Town has experienced greater frequency and intensity in droughts (Cole et al, 2021), flooding (Dube et al, 2022), heat events (Kapwata et al, 2022), fires (Stevens et al, 2020) and coastal damage (Dube et al, 2021).

Cape Town is a city of unique social and ecological diversity but severely unequal geography and distribution of resources (Stålhammar, 2021). South Africa. Cape Town is exceptional in a biological sense because of its geographical location in the Cape Floristic region, which is the smallest and most diverse floral kingdom on earth (Goodness and Anderson, 2013). The region has almost 9000 plant species on 90,000 km$^2$, and 44% of the flora of the entire subcontinent on 4% of the land area (Mucina and Rutherford, 2006). It is a biodiversity hotspot with about 70% endemic species and has 11 of the 21 nationally recognised critically endangered vegetation types (Myers et al., 2000; Stålhammar, 2021).

## 5.1.4. Infrastructure and economic profile - highlights

Cape Town has many infrastructure assets that give its economy a comparative advantage, but due to the legacy of separate and exclusionary development, these do not necessarily facilitate equitable access to infrastructure and services (CCT, 2022). These infrastructures include the City road network, the international airport (which serves over ten million passengers per annum, is the second busiest airport in South Africa), information and communications technology (ICT) connectivity, as well as access to ports (the Port of Cape Town, in turn, is the second busiest container port in South Africa (Transnet, 2021)).

The ICT sector also offers agglomeration benefits, as Cape Town has established itself as a key technology hub with a number of major companies having their African-based head offices in the city. Cape Town services an agricultural hinterland in the Western Cape and beyond. Agricultural and agri-processing constitute an estimated 40% of total exports. (Quantec, 2021).

Despite these assets, economic growth at both a national and city level has not managed to keep pace with population growth. Gross domestic product (GDP) per capita - on a negative trajectory over the past decade - declined to R99 649 in 2020 (constant 2015 prices). In line with the national trend, economic growth in Cape Town contracted by 5,1% in 2020 (CCT, 2022). The South African Reserve Bank (SARB) estimated economic growth of 4,8% for the country for 2021, and Cape Town was likely to come in below this figure, at 4,7%, primarily due to the depressed tourism industry following the COVID-19 Pandemic (CCT, 2022).

Economic and business sectors that have grown quickly in Cape Town in the past years include business activities and services. These services include all service-related activities such as software and IT, including call centres and finance and insurance. Further service industries that are increasingly located in and growing in Cape Town financial intermediation, exprt insurance and pension funding, real-estate activities, and retail. Most of these economic growth areas are in the services sector, access to entry is limited and largely aligned to skills, and as a result, largely exclude the majority. Equally, these services are not labour-intensive, and the demand for labour in the higher-skilled tertiary sectors is limited. The supply of labour in the lower-skilled categories of the labour market are often mismatched to the tertiary sector needs. This widening gap is a key driving force behind structural unemployment in Cape Town (CCT, 2022). Cape Town's most labour-intensive sector is trade and hospitality, which was also the sector most affected by the pandemic, taking far longer to recover than other sectors, largely as a result of high costs of capital and the associated debt repayments and defaults that occurred during COVID (CCT, 2022).

The intersections between food and infrastructure are engaged in significant detail later in this report.

### 5.1.5. Employment

Unlike other African countries, informal employment, on average, contributes 11% to total employment in Cape Town (CCT, 2023). The current policy environment is extremely hostile to informal traders (Skinner and Haysom, 2016) and large food sector businesses have recently been investigated for operating in anti-competitive or monopolistic ways (CompCom, 2019). The goods and services provided through the informal economy are important in providing access to goods and services for the most vulnerable residents, including food, childcare and transport services (Tawodzera, 2019).

In 2020, 1,5 million individuals in Cape Town were employed, 429 128 were unemployed but searching, and another 30 000 were discouraged job seekers. These figures do not account for alternative, non-formal employment, but given the above mentioned hostility, these figures are lower than in most other southern African cities. Although Cape Town's broad unemployment rate has remained lower than any of the other metros, the 30,2% recorded in the third quarter of 2021 is the city's highest recording since 2008 (EPIC, 2020). Similarly, the narrow youth ( aged 15 to 24) unemployment rate increased to 47,3% in 2020, from 45,2% in 2019(CCT, 2023). This is lower than the youth unemployment rate for the country as a whole (59,0%), however, it is still notably higher than in other developing countries (CCT, 2022).

### 5.1.6. Development indicators and profile

Both the Human Development Index (HDI) and the Gini coefficient for Cape Town increased between 2010 and 2020. The HDI was 0,7526 in 2020, indicating an improvement in human development. The Gini coefficient, however, was 0,63,27 pointing to a growing gap in income distribution, and greater inequities. Cape Town is reported to have the highest global Gini coefficient, and interestingly, the Cape Town figure is higher than the national average of 0,63 (but this was a 2014 figure) (CCT, 2022). COVID-19 slowed economic growth, raised unemployment and led to greater food insecurity, which has disproportionately affected women, the poor and the vulnerable. However stark the impact of COVID might have been, the lag in recovery and the significant impact of the pandemic on multiple sectors of society reflects a significant underinvestment in both physical and social infrastructure, unacceptable high levels of inequality and a policy regime out of alignment with development needs. The proportion of households earning R3 500 or less per month is estimated to have increased from 22,6% in 2019 to 28,0% in 2020 (CCT, 2023).

The dotmap of Cape Town, drawn from Adrian Frith's mapping offers insights into both the spatial legacies of apartheid and segregated land access, but also the differences in density across the race groups. Per the dot map, one dot represents 250 people (See Figure 3).

Capetonians' health continues to improve, with a drop in the infant mortality rate in recent years, and an increase in life expectancy. The average life expectancy at birth in the Western Cape has increased for both females and males – from 64,3 years for males and 69,9 years for females in the period 2011–2016, to 64,9 years for males and 70,3 years for females in the period 2016–2021 (StatsSA, 2021).

HIV/Aids and tuberculosis trends in the city improved pre-pandemic due to better access to basic services and better patient monitoring and support. While this points to improved healthcare conditions, the invisible crises associated with diet related non-communicable diseases presents a significant challenge to the City, with the potential to significantly reduce the positive health outcomes reported.[7]

[7] In the Western Cape from 2009 to 2013, the mortality surveillance trends attributed 60% of deaths to NCDs (cancers, cardiovascular, diabetes and other causes) in both males and females.

The impacts of climate change have the potential to disrupt infrastructure, ecosystem services and general basic services provision in Cape Town, and disproportionately affect those who are already poor and vulnerable (CCT, 2021). The key climate-related hazards facing the city are heatwaves and high-heat days; decreased rainfall, drought and water scarcity; flood risk and storm damage; coastal erosion and sea-level rise, as well as fire risk. These risks occur in an already resource-constrained context, compounding existing challenges relating to energy provision, water resource management and biodiversity loss.

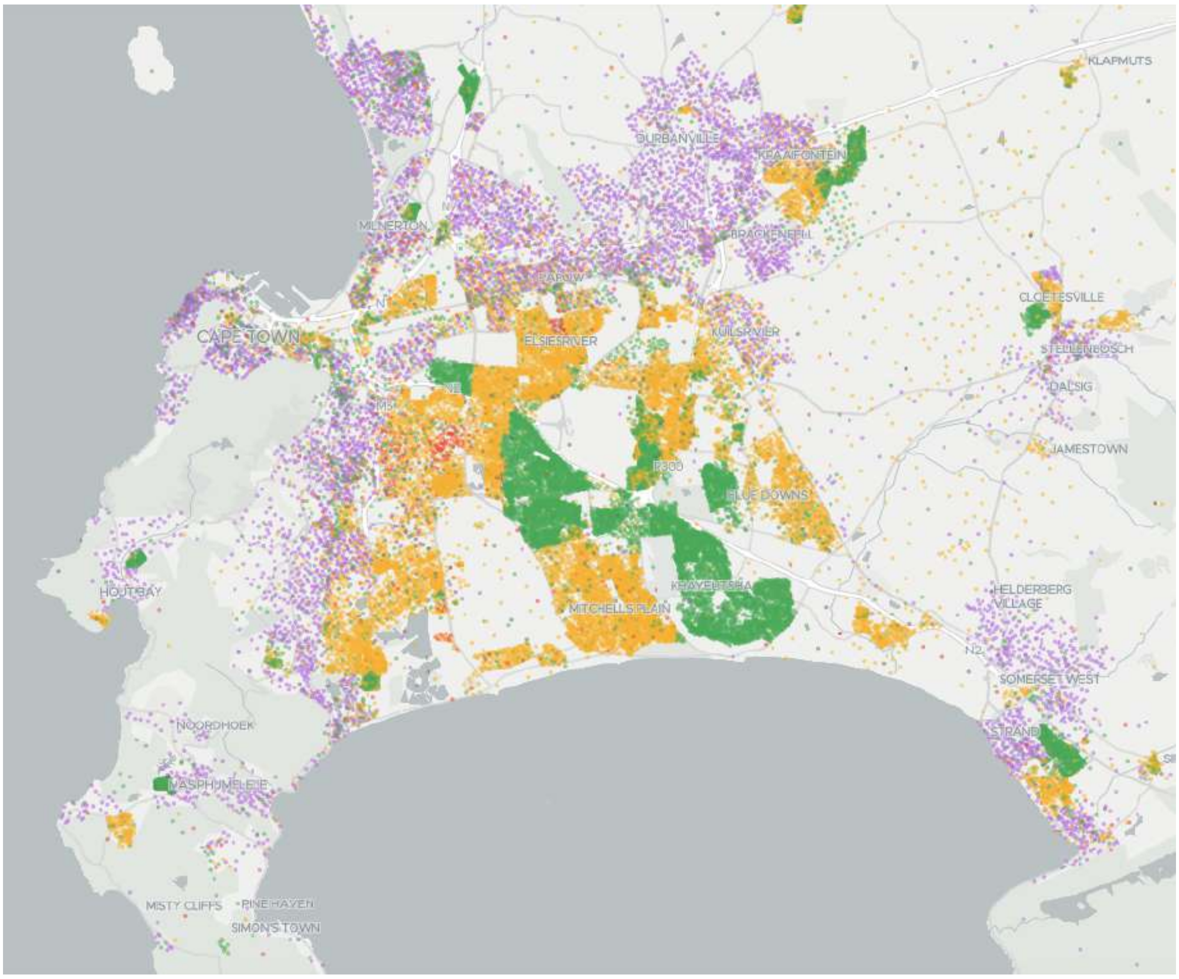


Figure 3: DotMap for Cape Town -
Key: Per the StatsSA South African Racial classifications - Purple = White residents; Yellow = Coloured residents; Green = Black residents; Red - Asian residents
(Source: Adrian Frith https://dotmap.adrianfrith.com/?lat=-34.0032&lon=18.6074&zoom=5.09)

## 5.2. History of the City

A food narrative is interwoven into many of the Cape's historical accounts, from trade between residents of the area and European spice trade ships travelling to the East, to the reasons for the founding of the first formal European settlement (a refreshment station fed by the Dutch East India Company's Garden still evident in the Cape Town city centre), to the food access challenges (food insecurity) associated with that settlement, and to the role that food and the control over grazing played in the subjugation of the original residents of the area. Food and the need to protect grazing land and the settlement reflect the first forms of 'apartheid' deployed within the Cape Town region (Clare, 2010). The ability to ensure food access was essential in the development and expansion of the early European settlement in the region.

The narrative of the successful establishment of a vittling station by the Dutch East India Company, led by Jan van Riebeeck is often drawn on in food related narratives, aligning the establishment of Cape Town with food. A generally accepted story, even one published in a number of reputable historical accounts of the establishment of the city follows a particular story line. … The supply of food was in fact the primary reason for the establishment of a settlement in what is today Cape Town, by the Dutch East India Company. Master gardener and "free burgher" Hendrik Boom prepared the first ground for sowing of seed in April 1652.[8] The settlers sowed different kinds of seeds and kept record thereof. Through trial and error they managed to compile a calendar used for the sowing and harvesting throughout the year.

While the "Company Gardens" were established, this narrative of European settler success requires far greater critical engagement. Van Riebeeck's own diary records highlight the hardships encountered. Van Riebeeck details how, as "governor", he was concerned about revolts by the "company workers", in fact indentured labourers, who were objecting to the poor quality of food, finding penguins and other such food unpalatable (Clare, 2010). These struggles were amplified by the fact that local clans, indigenous to the area, were grazing cattle near the Company fort, but refused to trade with the Company, who made their position, and strategic awareness, clear, that if they agreed to trade with the settlers, the settlers would never leave (Clare, 2010). This struggle and the need for more land to support both the settlement and to supply ships travelling past the "Cape" resulted in the expansion of the settlement into lands used by indigenous residents to the area, resulting in conflict and ultimately, the occlusion of the significant knowledge and traditions of the indigenous settlers from historical accounts.

While historical accounts of the establishment of Cape Town and the traditions and histories of the region are laden with racial prejudice, and often not necessarily a food history, the following chronological record assists in highlighting the different phases through which Cape Town has passed.

The area known today as Cape Town has no written European history before it was first mentioned by Portuguese explorer Bartholomeu Dias in 1488. The likelihood of Arabic and even other Eastern travellers having written records of the area is high given that some of the navigators assisting in travels past the Cape were of Arabian origin.

The German anthropologist Theophilus Hahn recorded that the original name of the area was "where clouds gather" in the indigenous Khoi language. Table Mountain was given its name in 1503 by António de Saldanha, a Portuguese admiral and explorer. He called it Taboa do Cabo ("table of the cape"). The name given to the mountain by the Khoi inhabitants was Hoeri 'kwaggo ("sea mountain").

Subsequent to earlier Portuguese and other navel travels around the Cape, resulting in the occasional ship wreck, from the later 1400s, the Cape saw little contact with Europeans until the mid 1600s when in 1652, Jan van Riebeeck and employees of the Dutch East India Company (Vereenigde Oost-Indische Compagnie, or simply VOC) landed at the Cape to establish a halfway station to provide fresh water, vegetables, and meat for passing ships travelling to and from Asia. The Cape was under Dutch "rule" via the VOC as a proxy for the Netherlands from 1652 to 1795 and again from 1803 to 1806. The group built shelters and laid out vegetable gardens and orchards, one such garden remains in Cape Town, still referred to as the Company's Garden. Water from the Fresh River, which descended from Table Mountain, was channelled into canals to provide irrigation.

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[8] It is worth noting that historical accounts differ. Records in conversations between van Riebeeck and the Company directors in 1656 reflect van Riebeeck's objection to the establishment of free burgers, the release from indentured labour of those working in the Cape. The reference to Boom as free and not indentured is perhaps semantics but it reflects the skewed historical narrative amplifying claims of ingenuity, perseverance, and at times superiority.

The first wave of Asian immigration to South Africa started in 1654. These immigrants were banished to the Cape by the Dutch Batavian High Court. These migrants formed the foundation of the diverse Cape population of today, but also brought the Islamic faith, and associated traditions to the Cape. The first large territorial expansion occurred in 1657, when farms were granted by the VOC to select indentured labourers from the VOC, effectively annexing lands of the local residents, in an attempt to increase food production. These farms were situated along the Liesbeeck River.

By 1754, just more than 100 years since the arrival of van Riebeeck, the population of the settlement on the Cape had reached 5,510 Europeans and 6,729 slaves.

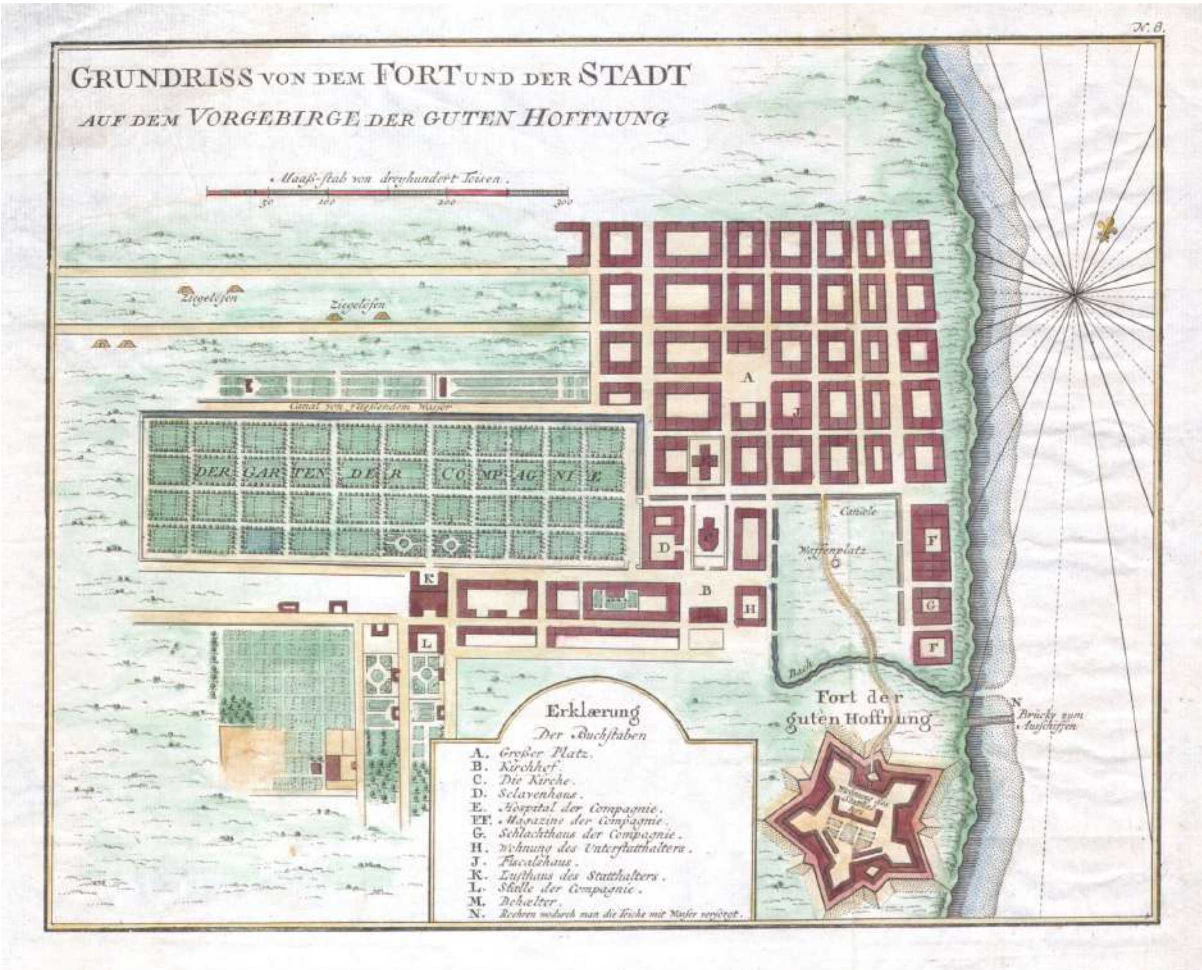



Figure 4: Layout of Cape Town settlement depicting sites of Castle and company gardens (Source: GH to get)

Following peace negotiations , under the terms of a peace agreement between Britain and France, the Cape was returned to the Dutch in 1802. Three years later, however, the war resumed and the British returned their garrison to the Cape after defeating Dutch forces at the Battle of Blaauwberg (1806). This period saw major developments for the city, and can be said to be the start of Cape Town as a city in its own right. The war between France and England ended in 1814 with a British victory. The Cape was permanently taken from the Dutch by the British in return for a large sum of money. In this period, the British saw the control of the Cape as key to their ability to maintain their command in India. British rule in the Cape resulted, in 1829, in the repeal of the vagrancy and pass laws of 1809 imposed by the Dutch. Thus, the Khoikhoi, in theory, were equal with the Europeans.

As in the rest of the British Empire, slaves – estimated to be around 39,000 in number – were emancipated in 1834. This led to the establishment of the Bo-Kaap by a Muslim community after being freed. The Cape Town Legislative Council was also established in 1834. Further political development occurred in 1840 when the Cape Town Municipality was formed. At its inception, the population stood at 20,016, of which 10,560 were of European descent.

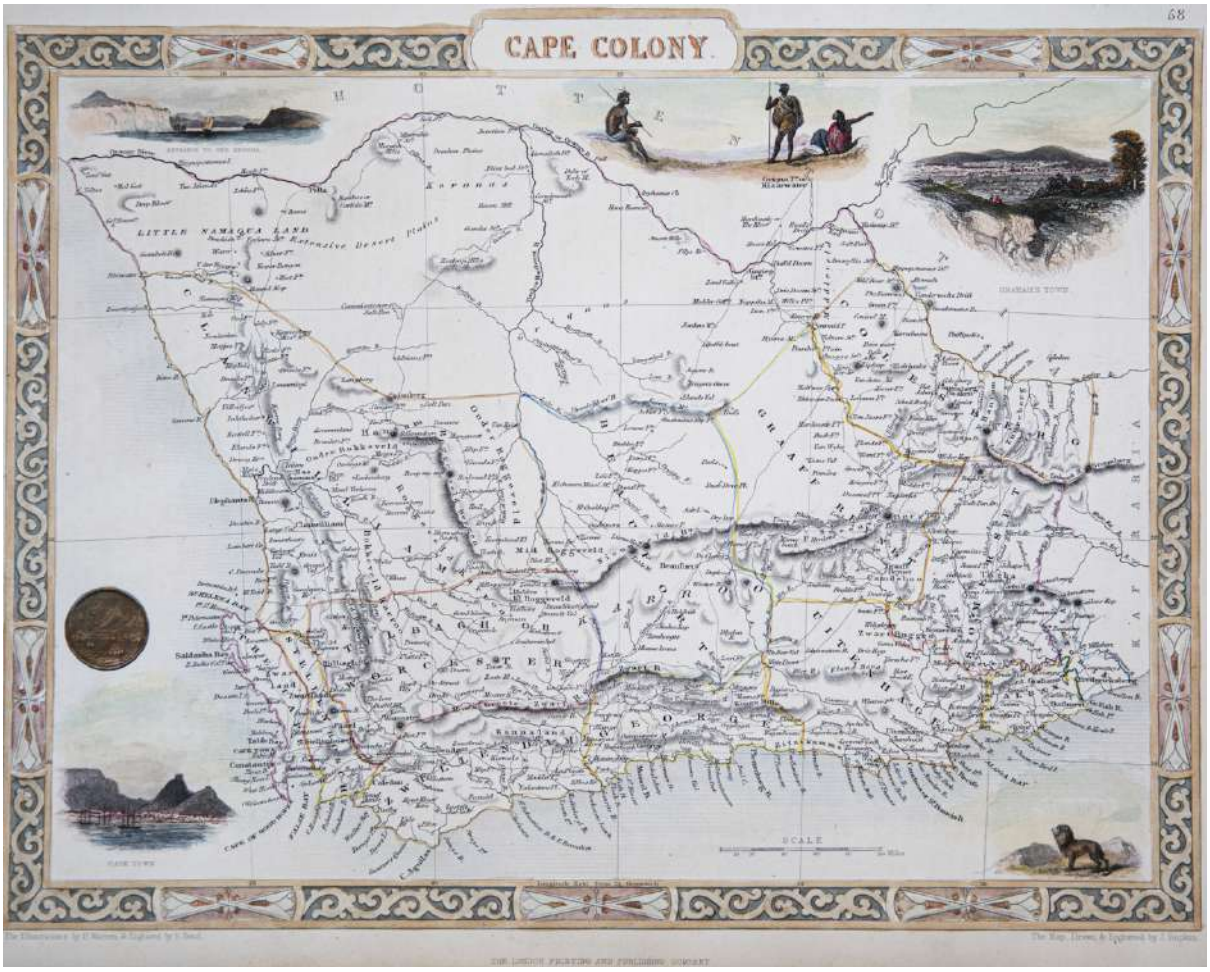



Figure 5: Map detailing the wider Cape Colony and associated lace names and extent into what is today the provinces of the Eastern Cape and Northern Cape.

Political developments saw gradual moves towards greater independence from Britain and towards a degree of political inclusiveness. In 1854, the Cape Colony elected its first parliament, on the basis of the multiracial Cape Qualified Franchise, regardless of race. After much political struggle, this was followed by a form of self-governance in 1872, when the Cape attained the right to elect its own locally-accountable executive and Prime Minister. A period of economic growth and social development ensued, with a rapid expansion of the Cape Government Railways and other infrastructure, connecting Cape Town to the Cape's vast interior. Despite theoretical equality under the Cape Qualified Franchise system, segregation and racialized ways of life remained given the nature of the settlement, and characters leading the Colony.

By way of an example, the Glen Grey Act is an 1894 Act of the Parliament of the Cape Colony. Instigated by the government of Prime Minister Cecil John Rhodes, it established a system of individual (rather than communal) land tenure and created a labour tax to force Xhosa men into employment on commercial farms or in industry.

In 1948, the National Party stood for election on its policy of racial segregation, later known as apartheid. After a series of bitter court and constitutional battles, the already limited voting rights of the Coloured community in Cape Province were revoked. In 1966, the once-vibrant District Six area was bulldozed and declared a white-only area. This and many similar declarations under the Group Areas Act resulted in whole communities being uprooted and relocated to the Cape Flats.

Under apartheid, the Cape was considered a "Coloured labour preference area", to the exclusion of Black Africans. The government tried for decades to remove largely Xhosa squatter camps, such as Crossroads, which were the focal point for black resistance in the Cape area to the policies of apartheid.

The later part of the 1900s saw significant development in Cape Town with large postulation growth, but also significant investment in infrastructure and industrial development. While the state led a significant proportion of this, through infrastructure, the private sector was also a significant financier of development. State-led development saw the reclamation of the Cape Town Foreshore with significant forced removals to accommodate the port and other aligned rail network development (See Figure 6).

Figure 6: Cape Town Foreshore development, led by the South African Railways, to create a deep water port, and new rail terminus.

Development also took the form of Moses-esque freeway developments, one such development coinciding with the clearances of District Six and the change from a mixed residential area to a Whites only Area.

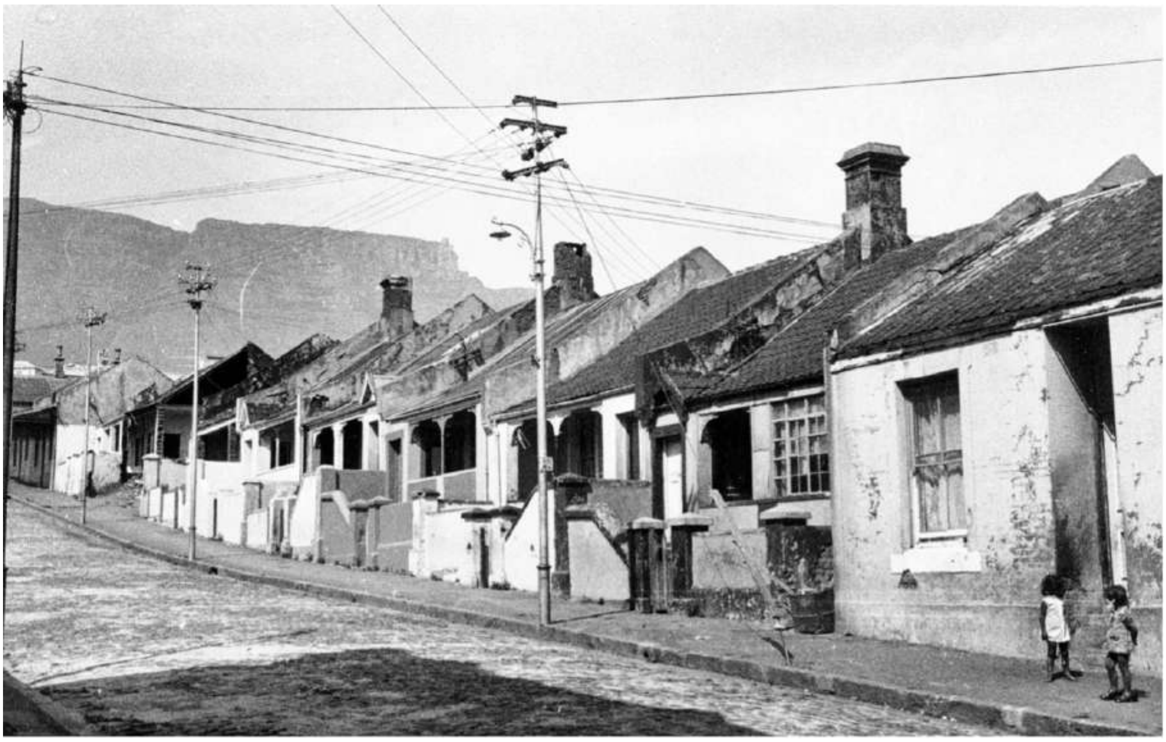


Figure 7: District Six street with Table Mountain in Background (Source: UCT collection)

The District Six Museum - a site to capture and record, but also witness, the brutality of forced removals and the destruction of an entire neighbourhood and bustling cosmopolitan part of the city - a clarion call highlighting the costs of so-called modernisation, at the cost of the most marginal

(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

A food narrative is interwoven into many of the Cape's historical accounts.

It is important to return briefly to the 1800s as the developments of that time remain evident in many processes within Cape Town and the wider South Africa. The need for self-determination and racial politics, while embedded within colonial rule, remains embodied in other South African histories, such as the departure from the Cape as a result of the Great Trek which began in 1836. About 10,000 Dutch families, for various reasons, left for the north in search of "new" land, thereby opening up the interior of the country. A further development was as a result of the discovery of diamonds and gold in the interior and the resultant development, population and economic boom.

The need to acquire food remains a critical city endeavour today. The challenge of ensuring that food was available in the city was evident during the latter part of the 1800s and adds further to the city's food history.

Following the discovery of diamonds in Kimberley in 1867, the region experienced significant growth. By the 1880s Cape Town's need to ensure food availability increased. Settlers from northern Germany were offered farm lands by the Cape authorities. These lands comprised the area known today as the Philippi Horticultural Area (PHA). Different groups took up the offer from the Cape authorities but the settlers who arrived in Cape Town in 1883 made up the bulk of the Philippi farming community. Although the farmers faced challenges, they managed to turn the sandy soils of the Cape Flats into the vegetable garden of Cape Town (Rabe, 2010). As much as 50 percent of certain crops consumed in Cape Town are still cultivated in the Philippi Horticultural Area (Battersby and Haysom, 2012).

### 5.2.1. The Philippi Horticultural Area (PHA)

The Philippi Horticultural Area is a useful case study in the relationship that the City has with food and the wider food system. This evolving and prioritisation is well captured but also the historical role of such areas in provisioning Cape Town.

In order to understand the PHA, it is necessary to understand first the processes that led to the establishment of the area but also, the more recent history, the past zoning changes and current status. The Philippi Horticultural Area is located in the heart of the area referred to as the Cape Flats, the area, as the name denotes, that is generally flat and with sandy soils laying South East of Central Cape Town (Rabe, 1992). Today this area is almost exclusively used for industrial or residential purposes, developments with a history entrenched in apartheid city planning and segregation. However, according to Lizette Rabe, in her book, *Die Groenteboere van Philippi*, "The farmers arrived in 2 groups: one in 1877 and the other in 1883" and these "farmers from the Lüneburger Heide in Germany settled here to supply the growing city of Cape Town with vegetables" (Rabe, 1992).

The areas of the PHA today make up a small portion of the original farming area. While development and expansion into alternative farming areas in the region took place, enabled by improved transportation and infrastructure, the PHA remained, and remains, an important source of food to the City of Cape Town. It is estimated that only about 10 percent of the original farming area still remains but the farmland, farmsteads, church complex, trees, hedges and even methods used by the early settlers to manage the shifting sand-dunes, finding and preserving water (dams partly still in use), irrigation methods, etc., are all more than a hundred years old (CCT, 2007:2).

The PHA has been subject to constant "shedding" of land area, often taken to allow for apartheid city developments and the creation of racially segregated townships, such as Mitchells Plein. The areas designated in Figure 8 are the result of further land use change. The first was an area reserved in 1967 (outer dotted line) as horticulture area (in terms of the 1967 Physical Planning Act) and was further reduced as a result of the area reserved by the 1988 Guide Plan (inner dot-dash line)(through the Land Use Planning Ordinance or LUPO) in 1988 (Hennessy, 2012). These two reservations are evident in Figure 8.

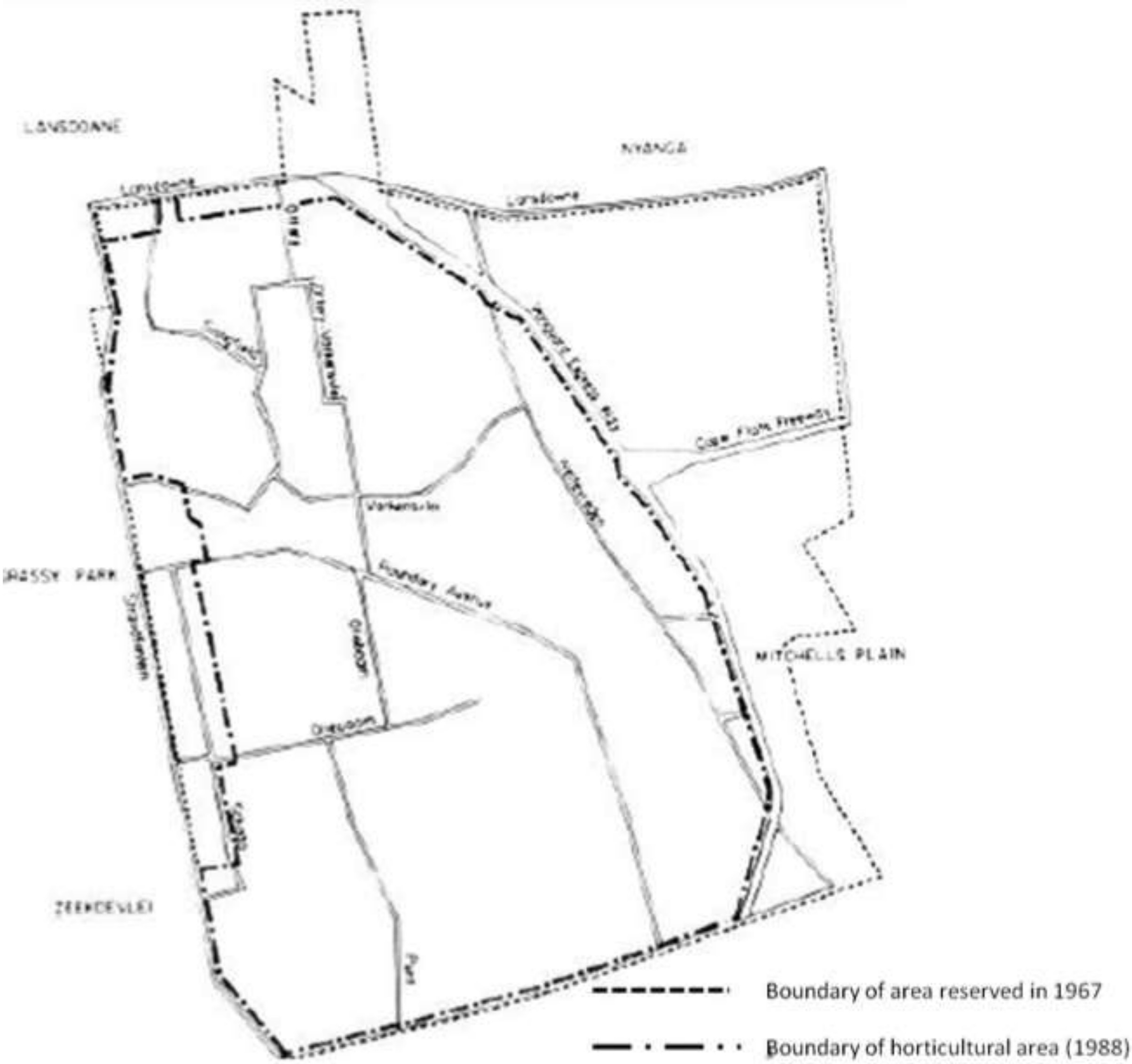



Figure 8: PHA detailing specific reservations as per 1967 (Guide Plan) and 1988 (LUPO) legislation (Source: CCT, 1988)

In attempting to understand the history of the PHA historical shifts in policy pertinent to the area can be read in maps from different periods. There have been specific shifts in how the PHA is articulated and represented in the figures below. Three key factors are evident. In the earlier plans, the value of the PHA is articulated in terms of the silica sand resource and agriculture receives only scant recognition (Figures 9, 10 & 11).

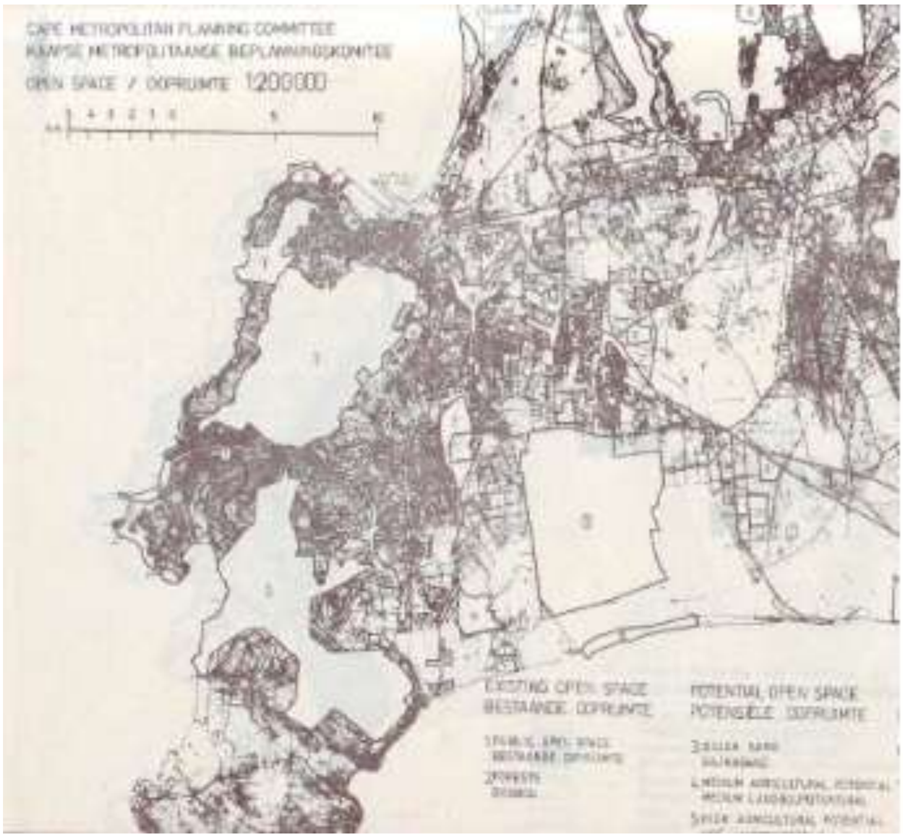



Figure 9: Detail of Silica Sands (Source: Cape Metropolitan Guide Plan: First Report, Cape Metropolitan Planning Committee, November 1975: 32)

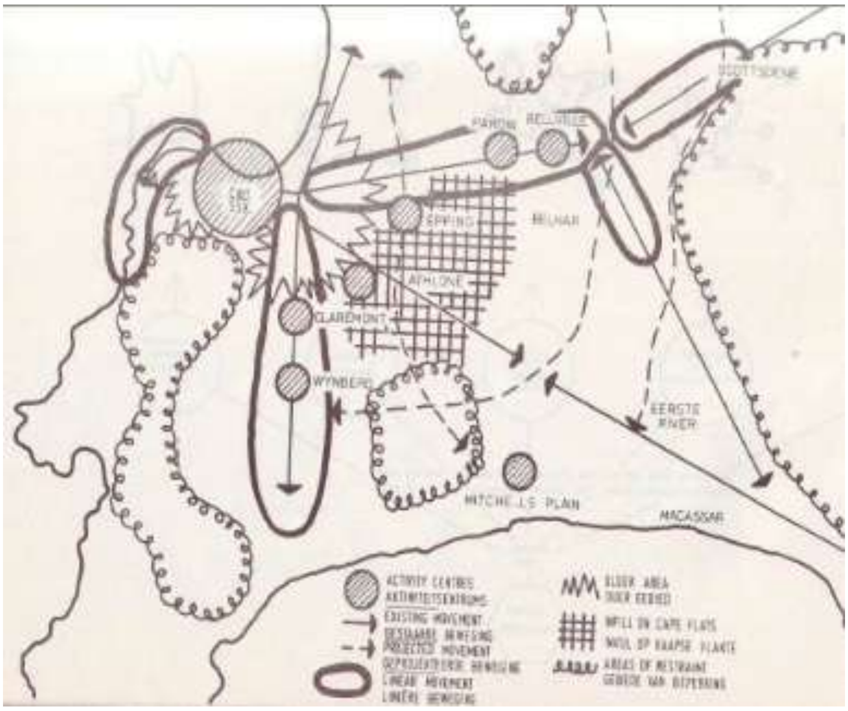



Figure 10: Areas of restraint – Urban Edge (Source: Cape Metropolitan Guide Plan: First Report, Cape Metropolitan Planning Committee, November 1975: 45)

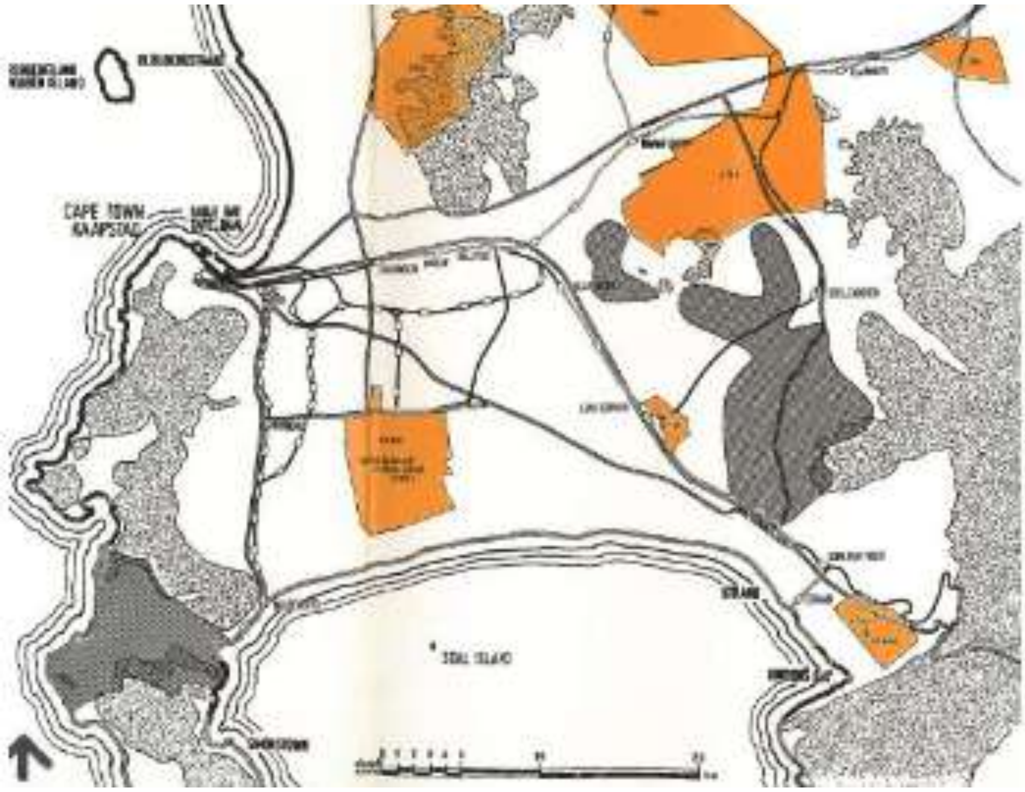
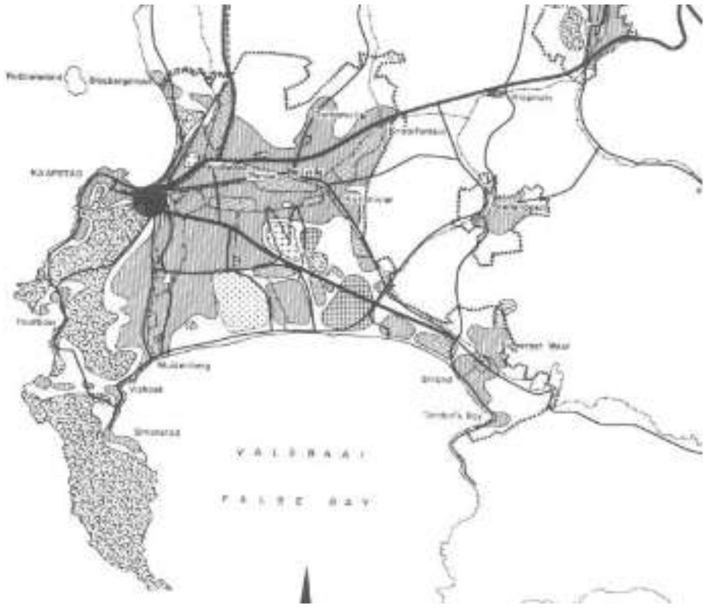



Figure 11: Detail of Silica Sands
(Source: Cape Metropolitan Area, Draft Guide Plan 1977 Volume 1: Peninsula, CMPC Map VIII)


Figure 12: Agriculture and smallholdings
(Source: Cape Metropolitan Area, Draft Guide Plan 1984, Volume 1: Peninsula, GP Committee for the CMA)

This then shifts to a mention of agriculture (Figures 12, 13 & 14) which would not exclude access to the sand resource. Second was the World Bank, Urban Sector Reconnaissance Mission carried out for Cape Town in 1993. This report argued that as an urban area, housing posed a more appropriate use of the PHA than agriculture (WB, 1993). The World Bank 1993, produced as the Reconstruction and Development Programme was being formulated did change perceptions as to the most appropriate use of the PHA and it is after this report that the high importance of silica sand no longer appears in the reports. However, the emergence of environmental aspects starting to appear (Figure 14). The silica sand is still mentioned but no longer as a strategic resource and serious considerations are given to the urban edge (Figure 15). The 2003 spatial development framework is of interest because within this report, an appendix argues that the PHA could provide for 26 percent of the CMA's housing land required (Figure 16 and 17). This report, with its focus on housing was one of the factors that then led to the further reduction in PHA land, and a period of land speculation and land use change requests.



Figures 12: Combined sand and agriculture listing
(Source: Cape Metropolitan Area, Guide Plan 1988, Volume 1: Peninsula, Department of Development Planning, 1988:40/41)


Figures 13: First listing of horticulture use
(Source: Cape Metropolitan Area, Guide Plan 1988, Volume 1: Peninsula, Department of Development Planning, 1988:71)

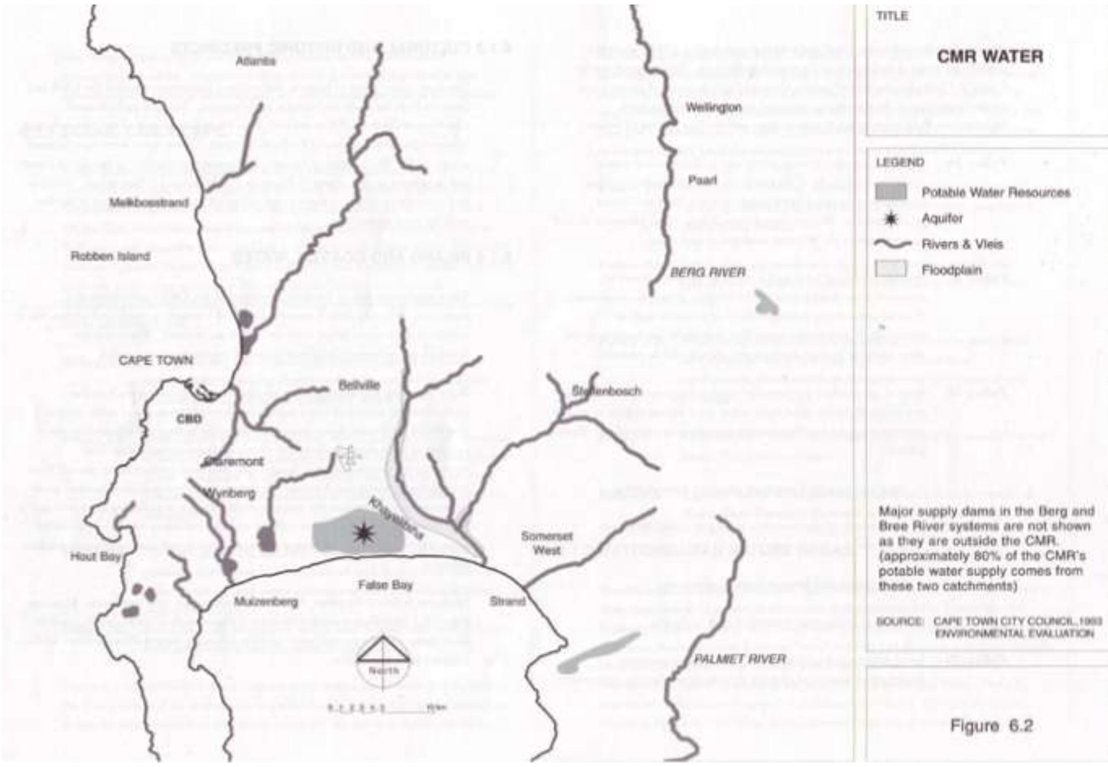



Figure 14: First detail of Cape Flats Aquifer in any plan
(Source: Metropolitan Spatial Development Framework, Guide for Spatial Development in the Cape Metropolitan Functional Region: Technical Report, April 1996:66)

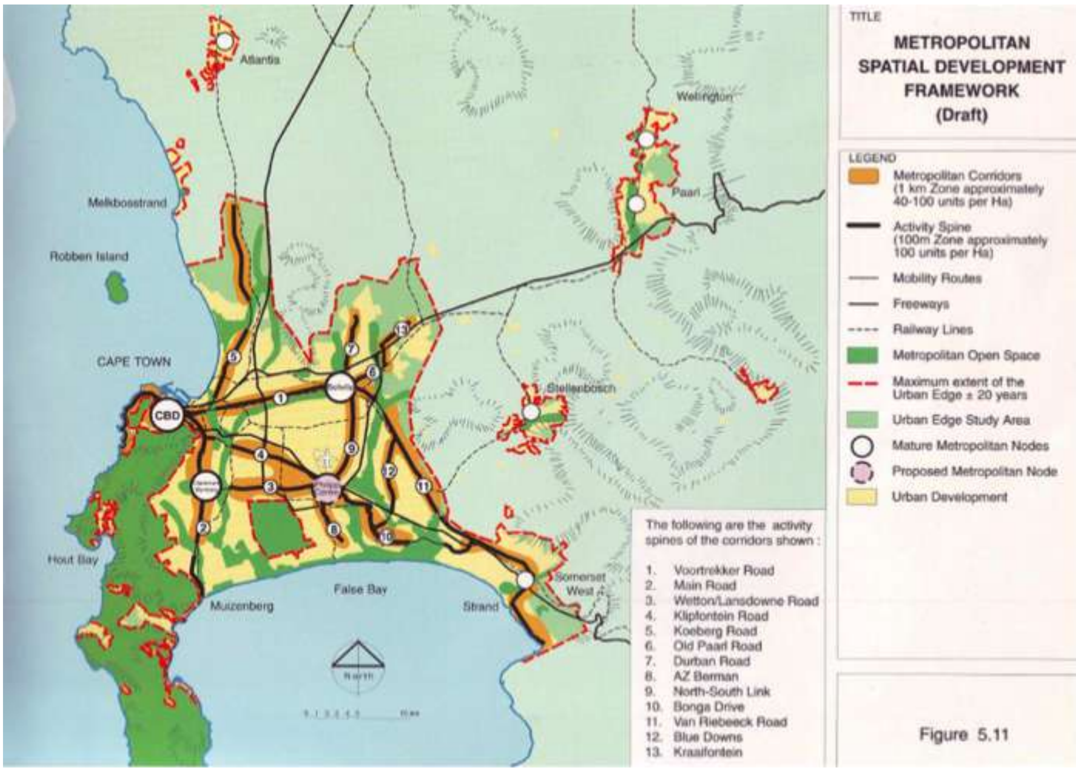



Figure 15: Detail of both urban edge and mention of metropolitan open space
(Source: A Guide for Spatial Development in the Cape Metropolitan Functional Region: Technical Report, April 1996:109)


Figure 16: PHA detailed within agri-zones
(Source: MSDF Review, Phase 1: Spatial Analysis, Trends and Implications Draft April/ May 2003, PEDS: 2003:51)

Figure 17: PHA detailed as secondary level agri land: note parts of Constantia of same value as PHA. (Source: Cape Town Spatial Development Framework, Technical Report, Draft, 2009: 55)

These reports and the allocation of priorities again shift in the decades between the 2003 and 2023 MSDF reports. In this period three events of critical importance are possible reasons for a return to considering the PHA to be a City Food System Asset (to be discussed in a later section); 1) Following the 2003 proposal and the removal of protection status, the PHA was under threat for reclassification. Civic groups and academics, as well as city officials, lobbied, took the city to court and actively challenged for the protection of the area. 2) In 2017, the most severe drought hit the region and Cape Town was faced with the prospect of a "day zero" (Olver 2019). As a result of this, the importance of the aquifer increased significantly with the city actively seeking to use the aquifer to supplement the city water supply, while at the same time, protect the aquifer. 3) COVID-19. COVID highlighted the significant vulnerability of many urban residents and amplified the importance of food and building more resilience and diverse food supply systems. The work of the City of Cape Town Resilience Strategy (and the associated Food Systems Strategy) served to place the PHA on the risk assessment tools and increased the relationship between the PHA, food and water source quality and protection (Figure 18 and 19).

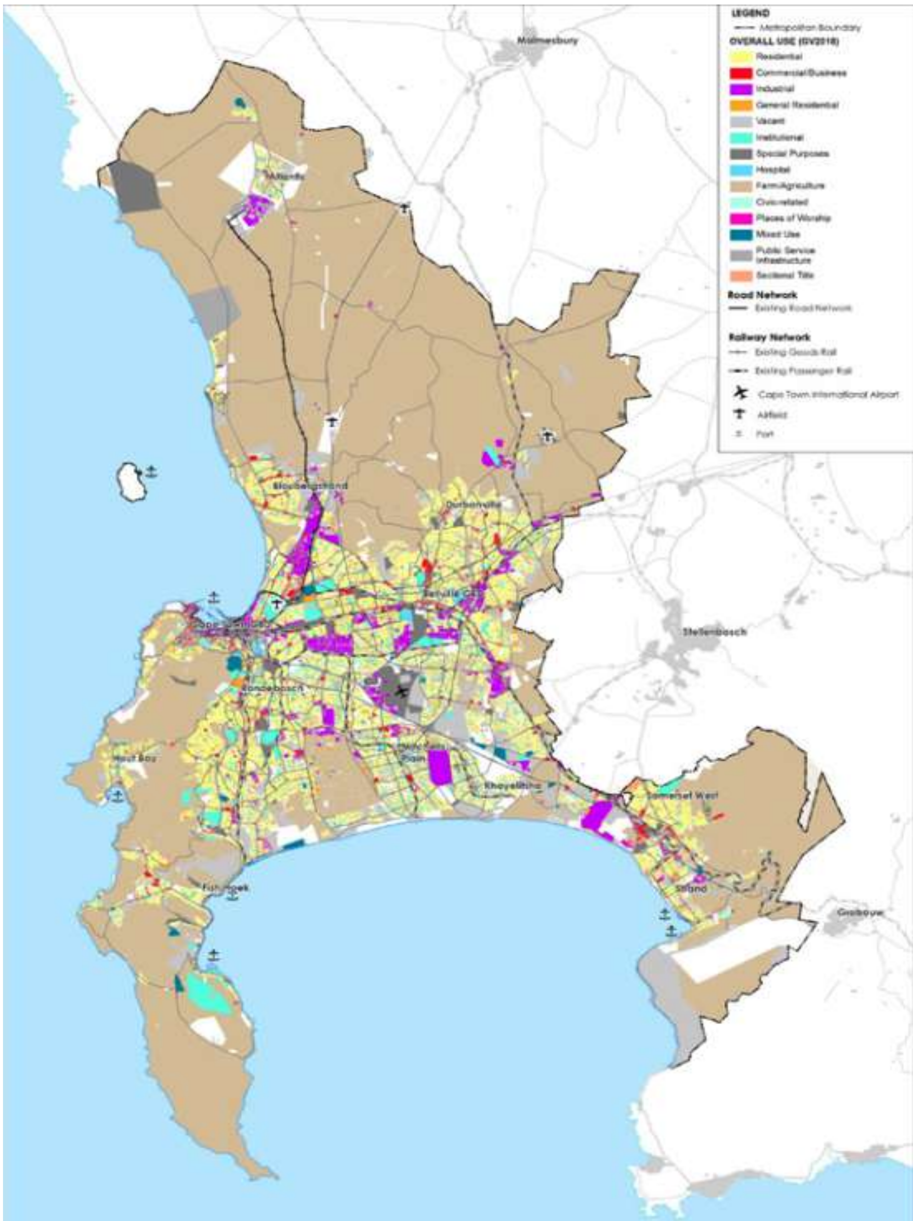



Figure 18: The PHA as detailed in the 2023 MSDF within a collection of land use descriptions (Source: City of Cape Town Municipal Spatial Development Framework, 2023: 30)

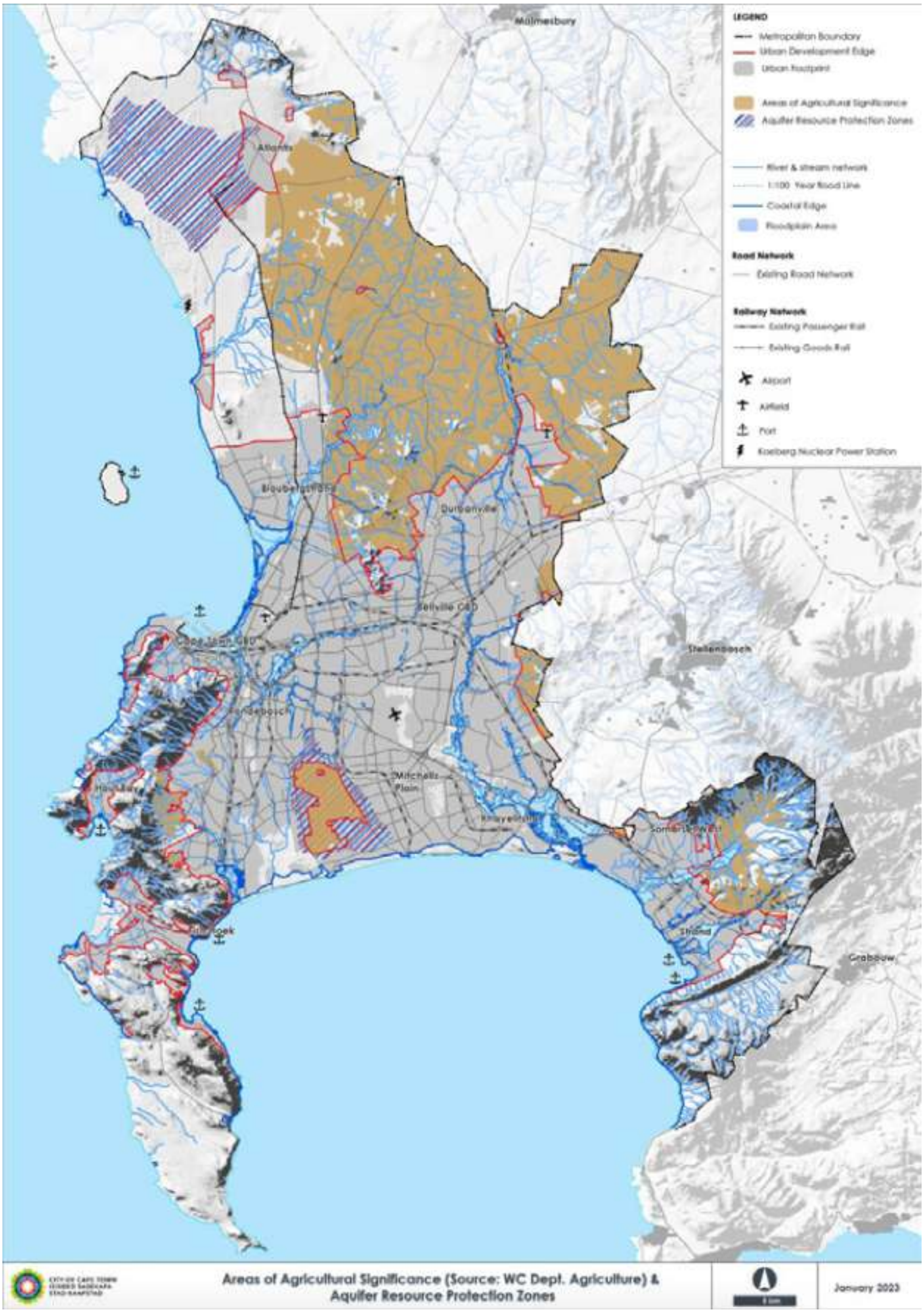



Figure 19: Areas of Agricultural Significance (Including Aquifer Resource Protection Zones (Source: City of Cape Town Municipal Spatial Development Framework, 2023: 87)

This historical case. With a focus on just one of the many areas of viable agricultural production within the wider Cape Metropolitan Area, captures the historical shifts, local politics, the balancing of priorities, and trade-offs. However, what this reflects is an underlying historical governance challenge. Despite the popular narrative of Cape Town owing its establishment to food, food is seldom considered a priority, food is seldom political and food is seldom accepted as a political imperative, this despite significant levels of hunger and under-nutrition.

There are exceptions to this though.

### 5.2.2. Women's Food Committees in Cape Town during the 1940s

The origins of these committees lay in the crisis over the distribution of food during the Second World War. According to Hettie September: 'During the war years, there was a scarcity of rice, all essential foods and the army trucks used to stop in a district and bring food to be sold. It was always chaos – fighting who's going to get what and we decided to organise'.

In 1943, local women began to form committees as the vans were being sent out by the Department of Social Welfare to distribute basic foodstuffs. By 1946, more politically conscious women had joined these food committees to form the Cape Town's Women's Food Committee (CTWFC). By 1947 the CTWFC represented an estimated 30 000 women from across the Cape Peninsula.

The Guardian newspaper catalogued the final campaigns of the organisation in 1950, when demonstrations were organised against the shortage of meat and the rising cost of living, and a deputation was sent to the Secretary for Food Supplies and Distribution to discuss the distribution services. Once rationing ended, so did the need for the food queues, but struggles over food continued. Despite the ultimate closure of the Food Committees, the political involvement of the major actors in these committees proved long-standing.

However, viewing women in the food campaigns simply as a preface to their calls for national liberation is misleading. While the food committees did politicise many previously isolated women, but for many others, perhaps the majority, the motivation remained simply domestic. Nevertheless, the committees helped to identify the potential political activism among women on issues directly affecting them. Although many members joined the CTWFC to ensure food access, their engagement with the CTWFC resulted in women playing an active role in the politics of that period. The CTWFC laid the foundation for the politicisation of a number of prominent women in the struggle against apartheid (Walker, 1991).

A summarised chronological record of the development of the City of Cape Town is detailed in Table 1. This is in no way an exhaustive account and any omissions are not intended, in any way, to occlude specific histories of different cultures, faiths, or nations.

### 5.2.3. Chronology of Historical activities

| Date | Historical activities and key actors |
|---|---|
| c.1300-c.1500 | The Khoisan are established as the dominant power in the southern and south-western Cape regions. |
| 1460 - 1485 | Portuguese navigators, representing the interests of the Portuguese Royal House and merchants eager to find a sea-route to India around the south coast of Africa, reach the coast of Guinea, West Africa (1460), 1483, Diogo Cão, a navigator acting under the instruction of the Portuguese King, reaches the mouth of the Congo River, and in 1485 puts ashore at Cape Cross, north of present-day Walvis Bay. |

| | |
|---|---|
| 1488 | The Portuguese explorer Batholemeu Dias succeeds in circumnavigating the Cape, naming it "Cabo de Boa Esperança" or the Cape of Good Hope. |
| 1497 | Vasco da Gama sails along the southern African coast on the way to India. They put foot on South African soil for the first time on 8 November at present-day St. Helena Bay on the west coast and encounter the first Khoi-Khoi. |
| 1498 | Bartolomeu Diaz Lands rounds the Cape in January and later reaches the mouth of the Limpopo River and lands 85 km north of it. Next, he goes ashore at the northern branch of the Zambezi delta. From there Diaz crosses the Indian Ocean with the help of the Arabian pilot, Ahmad ibn-Mayid, and reaches India via the Cape of Malabar, thereby establishing the Portuguese monopoly of the sea trade route to India |
| 1503 | Antonio de Saldanha, leading a Portuguese squadron, enters Table Bay (called Aguada da Saldanha until 1601) owing to a navigational error. They are the first Europeans to climb Table Mountain, which they name Taboa do Cabo (the Table Cape) on account of its shape. |
| 1590s | The English and the Dutch begin to call regularly at Table Bay on their way to and from Asia. Khoikhoi traded mainly iron, copper and marijuana with the foreigners at this stage.<br>During this time, English navigator, James Lancaster, barters sheep in the Bay of Saldaha (called Table Bay after 1601) from the Khoi-Khoi. He describes the sheep as very large, with good mutton, bearing no wool but hair, and with very large tails. |
| 1602 | 20 March, The Vereenigde Landsche Ge-Oktroyeerde Oost-Indische Compagnie (VOC) trading company receives a charter from the States General, the highest authority in the Republic of the United Netherlands, which entails a trading monopoly and the right to acquire and govern Dutch possessions in the Orient for a period of 21 years. Extended in 1623 and 1647. |
| 1600 - 1650 | Various Dutch and English activities to either settle in or acquire areas in and around Cape Town |
| 1647 | Dutch ship Nieuwe Haerlem is wrecked in Table Bay. A survivor, Leendert Janszen, remains behind to look after the cargo. After a year a Dutch ship fetches Janszen, his crew and the cargo. Upon his return to Holland, Janszen and companion, Proot, write a feasibility report on the establishment of a refreshment station at the Cape. |
| 1652 | The Dutch East India Company established a refreshment station at Table Bay. |
| 1653 | The first slave, a stowaway from Batavia, is given to Van Riebeeck. He worked for the Company until sent back to Batavia three years later. In October Autsumao (Herry), chief of the Goringhaikonas and Van Riebeeck's interpreter, murders the herder David Jansz and escapes with the settlers' herd of cattle. He is pursued but not captured. |
| 1655 | Trade from the settlement extends into the region and Maize seeds are introduced |
| 1650 - 1675 | Transition from a settlement to the Dutch Colony, and as a result of three Khoi-Khoi-Dutch wars expansion into other regions. |
| 1679 | A Slave Lodge is built to house Company slaves. That same year Simon van der Stel was appointed Commander of the Cape of Good Hope Colony, specifically mandated by the VOC to continue with the Company policy of Dutch colonial expansionism. |
| 1680 | van der Stel started a new settlement along the Eerste River on land belonging to the Khoi-Khoi and called it Stellenbosch. |
| 1682 | Governor-General van Goens instructs Commander Simon van der Stel to oppose all miscegenation (mixture of races) at the Cape. |
| 1690 - 1700 | Significant infrastructure developed (roads linking settlement, hospitals, etc.) |
| 1703 | Licences are issued to stock farmers, allowing them to graze their cattle beyond formal colonial boundaries on the land of the Khoi-Khoi. This is an attempt to increase colonialist (invader) productivity but with severe implications for the Khoi-Khoi. It is estimated that whereas colonists owned 8 300 head of cattle and 54 000 sheep in 1700, by 1710 this number had increased to 20 000 head of cattle and 131 000 sheep. |

| | |
|---|---|
| 1713 | An outbreak of smallpox, introduced by travellers on a passing ship, results in the death of a quarter of the White population and virtual decimation of the south-western Cape Khoi-Khoi who have no resistance against this disease. Tracts of Khoi-Khoi land become ownerless. Colonial cattle farmers appropriate this land. |
| 1789 | Merino sheep, originally from Spain (though some believe that the breed originated in North Africa) are imported from the Netherlands. This marks the start of the lucrative wool industry in the Cape Colony. It is also a significant reason for ensuing battles for the land of the indigenous people, including the amaXhosa, as settlers demand more grazing land. |
| 1794 | Tuan Guru founds the Auwal Masjid (mosque) in Dorp Street, Cape Town, the first Muslim place of worship in Southern Africa |
| 1803-1806 | The Cape is retroceded to Dutch rule under Batavian administration after the dissolving of the VOC. |
| 1806 | The British occupy the Cape for a second time. After a skirmish between British troops and a Cape burgher militia at Blaauwberg, the Dutch capitulate. All property of the Batavian Government is surrendered to the British. The formal cession of the colony to Britain takes place eight years later in 1814. |
| 1807 | Promulgation of the Abolition of the Slave Trade Act in Britain. Britain hereby bans slave trading which includes the importation of slaves to the Cape. However, ownership of slaves is still legal |
| 1834 | Official emancipation of slaves. Although legally emancipated, the Cape slaves are indentured as apprentices to their owners for a period of four years. Despite the system of apprenticeship, numerous slaves desert their owners, |
| 1840 | Cape Municipality declared and councillors elected on a non-racial but qualified Franchise account. |
| 1853 | Representative Government established at the Cape |
| 1867 | District Six established as Sixth Municipal District of Cape Town |
| 1901 | Outbreak of plague at Cape Town; Township of Uitvlugt established at Ndabeni; City Hall completed in Cape Town |
| 1936 | Cape African voters, the only South African non-white voters still able to exercise their vote, are removed from the voters roll. |
| 1948 | The National Party comes to power and formalises apartheid legislation with an active drive to support white agriculture. |
| 1950 | The Group Areas Act, 1950 was promulgated on 7 July 1950, and it was implemented over a period of several years. It was amended by Parliament in 1952, 1955 (twice), 1956 and 1957. Later in 1957, it was repealed and re-enacted in consolidated form as the Group Areas Act, 1957, which was amended in 1961, 1962, and 1965. In 1966, which was amended in 1969, 1972, 1974, 1975, 1977, 1978, 1979, 1982, and 1984. It was repealed, along with many other discriminatory laws, on 30 June 1991 by the Abolition of Racially Based Land Measures Act, 1991. |
| 1962 | On 5 August 1962, police captured Mandela along with fellow activist Cecil Williams near Howick. |
| 1963 | On 11 July 1963, police raided Liliesleaf Farm, arresting those that they found there and uncovering paperwork documenting MK's activities, some of which mentioned Mandela. The Rivonia Trial began at Pretoria Supreme Court in October. After being found guilty on revised and amended charges, Mandela and his co-accused, excluding Dennis Goldberg (who was white) were transferred from Pretoria to the prison on Robben Island, remaining there for the next 18 years. |
| 1966 | District Six area bulldozed and declared a white-only are |
| 1982 | In April 1982, Mandela was transferred to Pollsmoor Prison in Tokai, Cape Town, along with senior ANC leaders Walter Sisulu, Andrew Mlangeni, Ahmed Kathrada and Raymond Mhlaba. Mandela was moved to Victor Verster Prison, near Paarl, in December 1988. |

| | |
|---|---|
| 1989 - 1990 | In 1989 South African Prime Minister, PW Botha suffered a stroke; subsequently he stepped down as leader of the National Party, to be replaced by F. W. de Klerk. Botha was replaced as state president by de Klerk six weeks later. Subsequently De Klerk released a number of ANC prisoners. Although some National Party cabinet ministers were opposed to his plans, de Klerk met with Mandela in December to discuss the situation, a meeting both men considered friendly, before legalising all formerly banned political parties in February 1990 and announcing Mandela's unconditional release. Mandela was released on the 11th of February 1990. He proceeded to the Grand Parade in Cape Town, a site of slave sales and public floggings in the colonial period, to address South Africa, and the world, in his first speech as a free man. |
| 1994 | General elections for all South Africans. |

Table 1: Chronological summary of the history of Cape Town 1300 - 1994

Like many South Africa cities, Cape Town's colonial and racially segregated legacies continue to shape the form and function of the city. Table 1 has sought to highlight key food system and city specific events in order to capture the historical injustices and the legacies of these injustices embedded in both place and the City's food system. This is in no way an exhaustive account. Many communities and families can offer detailed accounts of these historical intersections between food, history and injustice. At times, food was used as a means to break imposed divides. Different authors have evocatively captured historical narratives associated with food and different types of food. Food allows us to return to these injustices, not just food related, but as they pertain to land, place, identity and so much more. This is work that still needs to be done. In addition, as will be discussed later in respect of identify and culture, the particular historical accounts of Cape Town's food system still occlude many histories and cultures. Food offers a lens to reflect on the significant work that needs to be done to give justice to the many food systems and cultures in the City.

Van Graan, recognising the changes that have taken place in the transformation of society since 1994, draws attention to what has not changed:

> And now, even though we have embraced an 'of the people, by the people, for the people' democracy, 'the people' still appear to be forgotten too easily ... Cape Town is still a city in the making. The question is whose tastes, smells, feelings, sights and sounds will come to prevail in defining the character and experiences of the city?

(Van Graan, 2007: v)

Van Graan's statement alludes to the inequality present in the city but also questions whose voices, or agency, determine the nature of the City. The complex histories of both South Africa and Cape Town are implied in the above statement. This history is critical as it is the foundation of the form, nature and politics of Cape Town. The history of Cape Town is deeply entwined with the region's food history.

# 5.3. City's Governance Structure (embedded within national structures)

## 5.3.1. Overarching structure of government in South Africa

South Africa is a constitutional democracy with a three-tier system of government and an independent judiciary. The national, provincial and local levels of government all have legislative and executive authority in their own spheres, and are defined in the Constitution as distinctive, interdependent and interrelated.

Operating at both national and provincial levels are advisory bodies drawn from South Africa's traditional leaders. It is a stated intention in the Constitution that the country be run on a system of cooperative governance. Government is committed to the building of a free, non-racial, non-sexist, democratic, united and successful South Africa. Operating at both national and provincial levels are advisory bodies drawn from South Africa's traditional leaders. It is a stated intention in the Constitution that the country be run on a system of cooperative governance.

The Constitution of the Republic of South Africa of 1996 was approved by the Constitutional Court on 4 December 1996 and took effect on 4 February 1997. The Constitution is the supreme law of the land. No other law or Government action can supersede the provisions of the Constitution.

The guidance of the South African Constitution is critical as not only does this provide clarity on the roles and mandates of governance in South Africa, it also contains the Bill of Rights. Within the Bill of Rights is Section 27 (1)b which is the Right to Food. Section 28 (1)c is also the Right of Children to Basic Nutrition. These rights will be discussed later in this report.

Government consists of national, provincial and local spheres, which are distinctive, interdependent and interrelated. The powers of the law-makers (legislative authorities), Government (executive authorities) and courts (judicial authorities) are separate from one another.

Parliament is the legislative authority of South Africa and has the power to make laws for the country, in accordance with the Constitution. It consists of the National Assembly and the National Council of Provinces (NCOP). Parliamentary sittings are open to the public. The role of Parliament, as the representative of the people, is to promote and oversee adherence to the values of human dignity, equality, non-racialism, non-sexism, and all other rights enshrined in the Bill of Rights, and to oversee the implementation of constitutional imperatives. The mandate of Parliament is based on the provisions of chapter 4 of the Constitution, which establishes Parliament and sets out the functions it performs. Parliament is elected to represent the people, ensure government by the people under the Constitution, and represent the interests of provinces in the national sphere of government. Members of Parliament elect the president, provide a national forum for the public consideration of issues, pass legislation, and scrutinise and oversee executive action.

The Constitution provides for three categories of municipality, metropolitan municipality, district municipality and local municipality, each have slightly different powers and authorities. There are 278 municipalities in South Africa, comprising eight metropolitan, 44 district and 226 local municipalities. They are focused on growing local economies and providing infrastructure and service.

In terms of the South African Constitution, these municipalities ensure full and total coverage of South Africa (as detailed in Chapter 7 of the Constitution). These municipalities of different types, are all embedded within full Provincial coverage (per Chapter 6 of the Constitution) across the nine provinces. The provinces cover the entire country and are all within the wider national legislative framework. For further detail on these different legislative and administrative structures, please view the South African Constitution.

As directed by the Constitution, the Local Government: Municipal Structures Act of 1998 contains criteria for determining when an area must have a category-A municipality (metropolitan municipalities) and when municipalities fall into categories B (local municipalities) or C (district municipalities).
The Act also determines that category-A municipalities can only be established in metropolitan areas. Metropolitan councils have single metropolitan budgets, common property ratings and service-tariff systems, and single- employer bodies.

South Africa has eight metropolitan municipalities, namely:

- Buffalo City (East London)
- City of Cape Town (per the 2000 CMA designation)
- Ekurhuleni Metropolitan Municipality (East Rand)
- City of eThekwini (Durban)
- City of Johannesburg
- Mangaung Municipality (Bloemfontein)
- Nelson Mandela Metropolitan Municipality (Port Elizabeth)
- City of Tshwane (Pretoria).

Metropolitan councils may decentralise powers and functions. However, all original municipal, legislative and executive powers are vested in the metropolitan council. In metropolitan areas, there is a choice of types of executive system: the mayoral executive system where executive authority is vested in the mayor, or the collective executive committee system where these powers are vested in the executive committee.

Non-metropolitan areas consist of district councils and local councils. District councils are primarily responsible for capacity- building and district-wide planning. The Local Government: Municipal Structures Act of 1998 provides for ward committees whose tasks, among other things, are to:

- prepare, implement and review IDPs
- establish, implement and review municipalities' performance-management systems
- monitor and review municipalities' performances
- prepare municipalities' budgets
- participate in decisions about the provision of municipal services
- communicate and disseminate information on governance matters.

In South Africa, a metropolitan municipality or Category A municipality is a municipality which executes all the functions of local government for a city or conurbation. This is by contrast to areas which are primarily rural, where the local government is divided into district municipalities and local municipalities. The Constitution, section 155.1.a, defines "Category A" municipalities. In the Municipal Structures Act it is laid out that this type of local government is to be used for conurbations, "centre[s] of economic activity", areas "for which integrated development planning is desirable", and areas with "strong interdependent social and economic linkages".

The metropolitan municipality is similar to the consolidated city-county in the US, although a South African metropolitan municipality is created by notice of the provincial government, not by agreement between district and local municipalities.

Metropolitan municipalities were brought about during reforms of the 1990s so that cities could be governed as single entities. For example, eThekwini (including Durban) is today a single municipality formed from what were more than 40 separate jurisdictions before 1994.

This reform process was a response to the way in which apartheid policy had broken up municipal governance. For example, Soweto had, until 1973, been administered by the Johannesburg City Council, but after 1973 was run by an Administration Board separate from the city council. This arrangement deprived Soweto of vital subsidies that it had been receiving from Johannesburg. A key demand of anti-apartheid civics in the 1980s was for 'one city, one tax base' in order to facilitate the equitable distribution of funds within what was a functionally integrated urban space. Local government reform after apartheid produced six Transitional Metropolitan Councils following the 1995/6 local government elections. These were characterized by a two-tier structure. From 2000, these six Metropolitan Councils were restructured into their final single-tier form. In 2011, Buffalo City (including East London) and Mangaung (including Bloemfontein) were added to the category of metropolitan municipality.

## 5.3.2. Governance In Cape Town

### History and ultimate formation of City of Cape Town (Cape Town Metropolitan Area)

Cape Town first received local self-government in 1839, with the promulgation of a municipal ordinance by the government of the Cape Colony, a British Colony, the governing structure with authority to make such a promulgation. The Cape Colony at the time extended as far as East London in the current Eastern Cape Province, to present day Namibia, and bordered on the current provinces of the Free State and the North West Province.

When it was created, the Cape Town municipality governed only the central part of the city known as the City Bowl, and as the city expanded, new suburbs became new municipalities, until by 1902 there were 10 separate municipalities in the Cape Peninsula. During the 20th century, many of the inner suburban municipalities became unsustainable; in 1913 the first major unification took place when the municipalities of Cape Town, Green Point and Sea Point, Woodstock, Mowbray, Rondebosch, Claremont, Maitland, and Kalk Bay were unified to create the first City of Cape Town. In 1927 the municipality of Wynberg was also merged with Cape Town, with the result that all of the Southern Suburbs were incorporated into the City.

Many new municipalities were established during the 20th century. Durbanville achieved municipal status in 1901, Goodwood in 1938, Parow in 1939, Bellville and Fish Hoek in 1940, Pinelands in 1948, Kuils River in 1950, Milnerton in 1955, Kraaifontein in 1957, Gordon's Bay in 1961, Brackenfell in 1970. In 1979 Bellville was upgraded to city status. The areas not included in a municipality were governed by divisional councils. Most of the Cape metropolitan area fell under the Divisional Council of the Cape, while the eastern parts around Brackenfell, Kuils River and the Helderberg area formed part of the Divisional Council of Stellenbosch, and an area in the northeast around Kraaifontein formed part of the Divisional Council of Paarl.

In 1987 the divisional councils of the Cape, Paarl and Stellenbosch were dissolved and the Western Cape Regional Services Council (RSC) was created in their place. The RSC councils were indirectly elected, consisting of representatives nominated by all the local authorities within its area, including municipalities, management committees and town councils. The Cape Rural Council represented the rural areas of the RSC that were not included in any local authority. Also in 1987, an act of the House of Assembly allowed the creation of local councils for white communities in peri-urban areas.

As part of the post-1994 reforms, municipal government experienced a complete overhaul. The existing local authorities, political parties, ratepayers' organisations, and community organisations were brought together into a negotiating forum. This forum agreed on the creation of a two-level local government system consisting of multiple transitional metropolitan substructures (TMSs), brought together in a transitional metropolitan council named the Cape Metropolitan Council (CMC). The CMC would replace the Regional Services Council and take over its responsibilities; it would also be responsible for metro-level planning and coordination, improving service delivery in disadvantaged areas, and cross-subsidization of poorer areas with revenue from affluent areas. Initially, in a period called the "pre-interim phase", the existing local authorities would become TMSs but their councils would be replaced by councillors nominated by the members of the negotiating forum. This agreement came into effect, and the pre-interim phase began, on 1 February 1995.

The restructuring was driven by a need to undo earlier governance structures, which, prior to in 1994, with a large variety of different local authorities divided on the basis of race. This is depicted in Figure 20 reflecting the different governing bodies pre 1994 and the local government structuring in the pre-interim phase between 1995 and 1996. This is depicted in Figure 21.

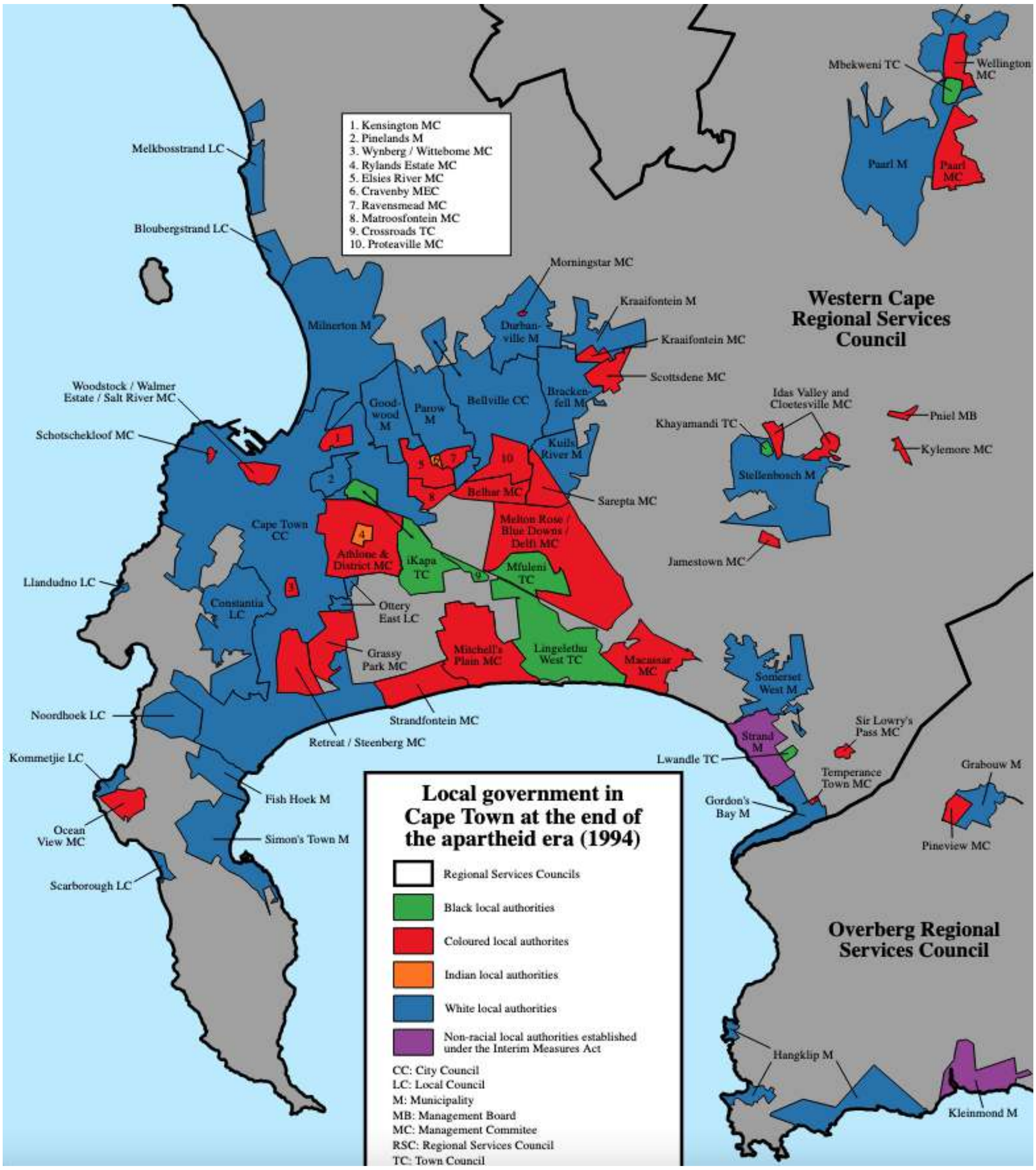



Figure 20: Governance structures prior to 1994.

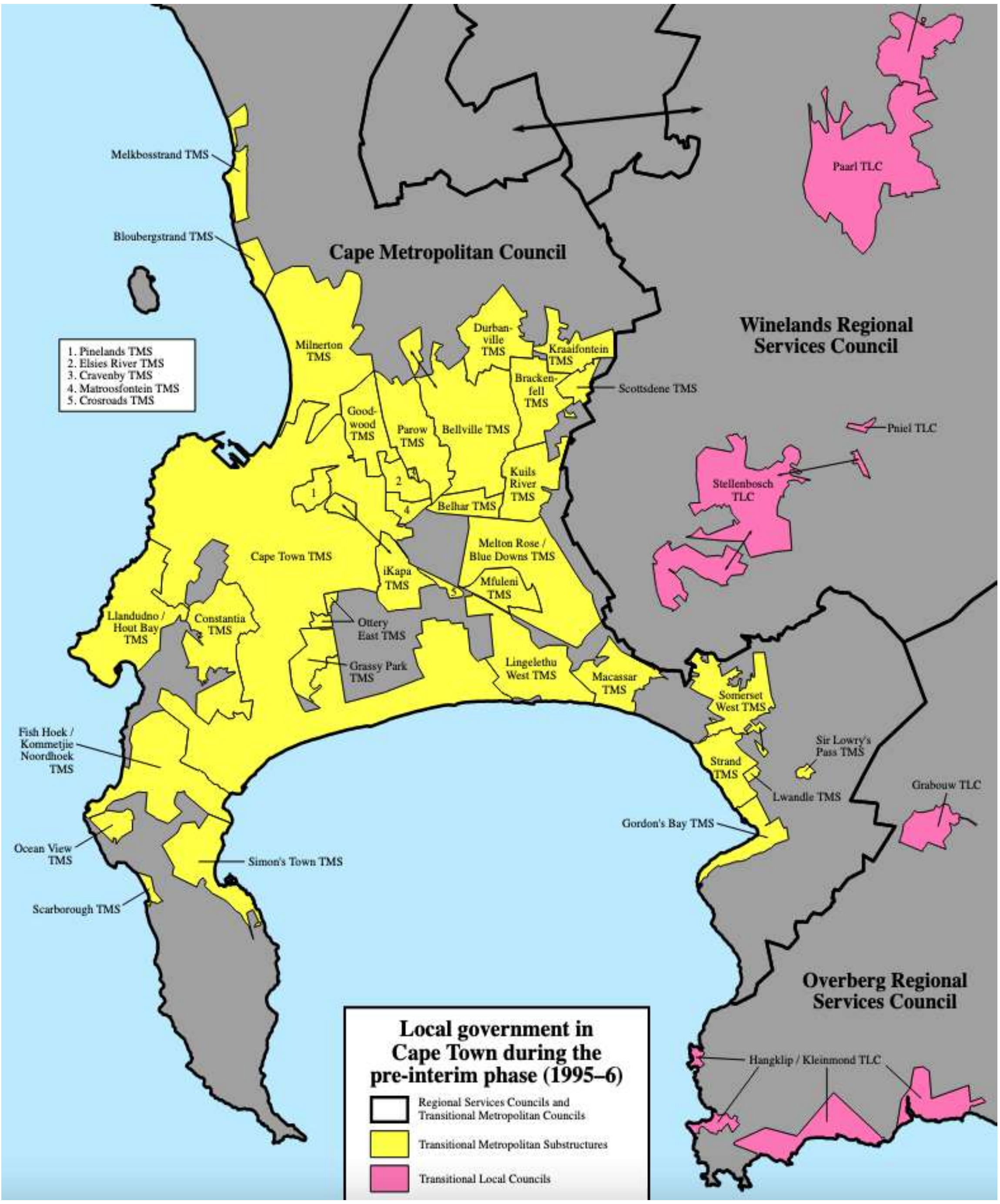



Figure 21: Pre-interim phase between 1995 and 1996

The second phase of the transformation, known as the "interim phase" began on 29 May 1996 when local elections were held. The pre-interim TMSs were dissolved, and six new TMSs were established covering the whole metropolitan area: City of Cape Town (Central), City of Tygerberg, South Peninsula Municipality, Blaauwberg Municipality, Oostenberg Municipality, and Helderberg Municipality. The Cape Metropolitan Council continued with its coordinating functions. The new structure is reflected in Figure 22, detailing the creation of the six TMS areas.

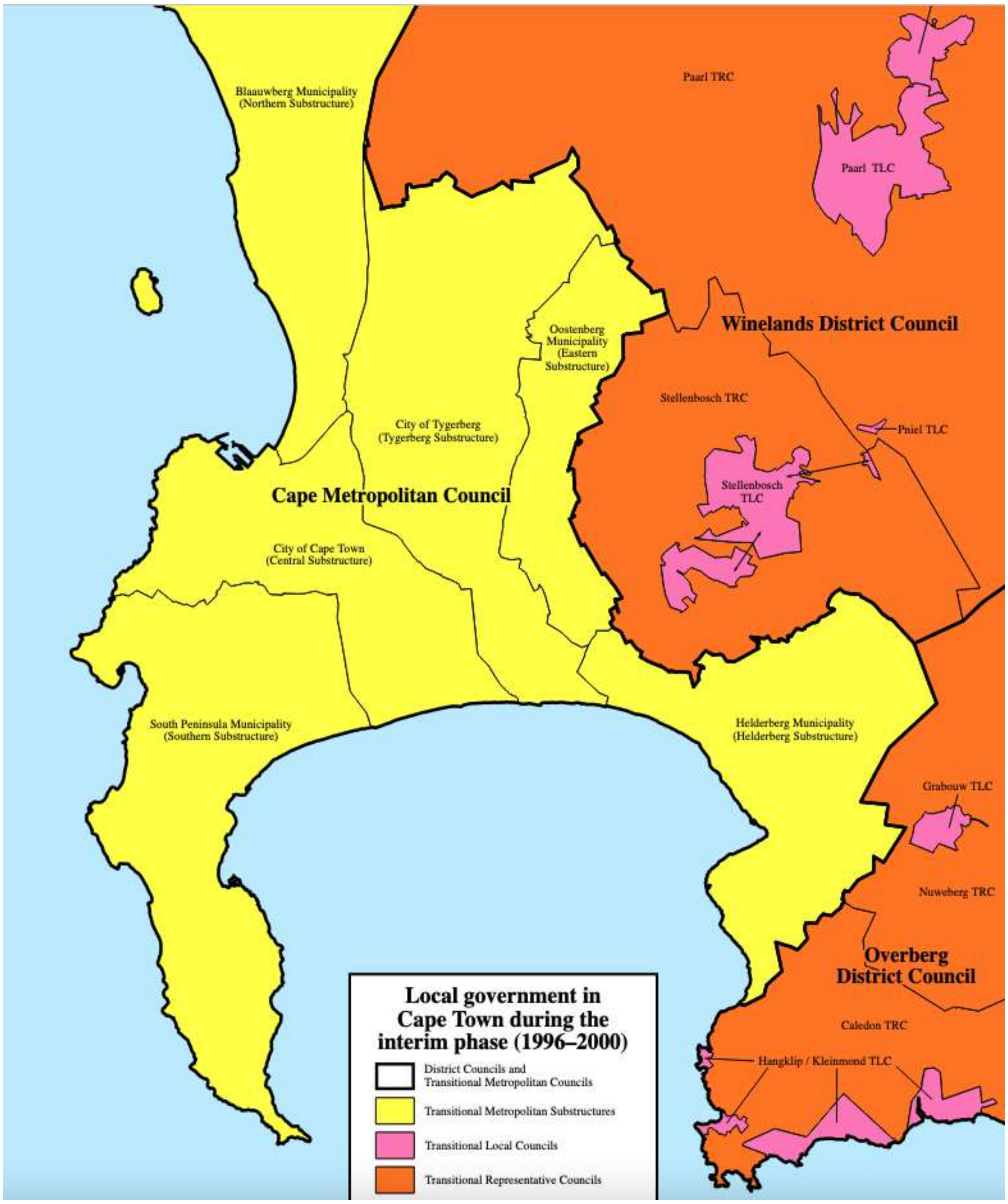



Figure 22, detailing the creation of the six TMS areas.

In 1998 Parliament enacted legislation (the Municipal Structures Act) determining the final form of local government in post-apartheid South Africa. This legislation determined that metropolitan areas would be governed by unified metropolitan municipalities. Local elections were held on 5 December 2000; the Cape Metropolitan Council and the six interim TMSs were dissolved and replaced by the unified City of Cape Town. It is for this reason that the City of Cape Town is sometimes referred to as the "Unicity". At the time of the 2000 election the northern boundary of the metropolitan area was also extended to include Philadelphia, Klipheuwel, and the surrounding farmland. This is the current municipal area of Cape Town, the CMA, hereafter referred to as the City of Cape Town, unless making specific reference to an earlier administrative boundary.

The current municipality covers Cape Point in the south-west, Gordon's Bay in the south-east, and Atlantis in the north, and includes Robben Island. The remote Prince Edward Islands are deemed to be part of the City of Cape Town, specifically of ward 115.

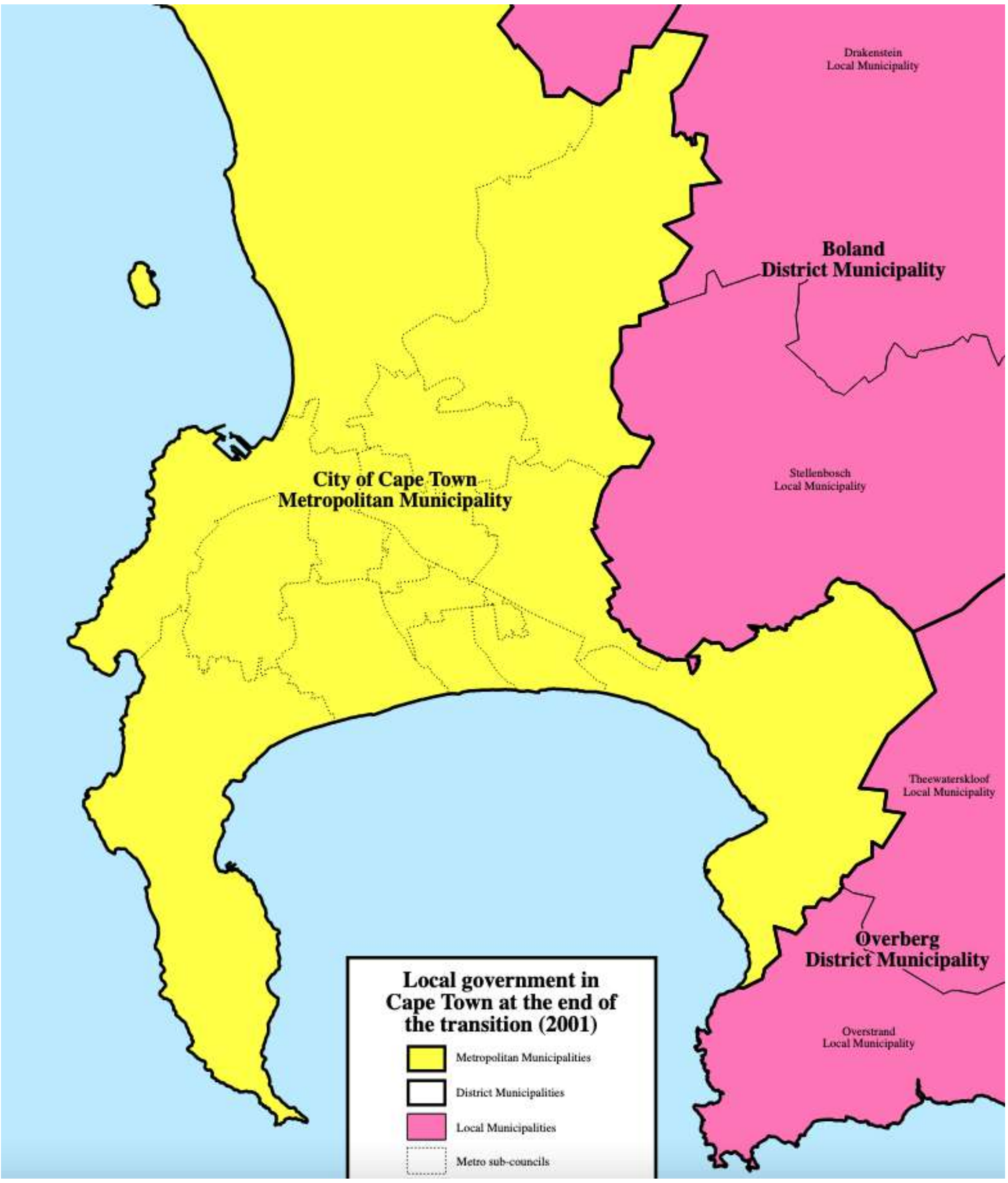



Figure 23: The municipal boundary subsequent to the formation of CMA in 2000

Importantly, while food system related aspects have been part of the governance mandates of different types of councils and municipalities, this has not been a core function and seldom has there been budget allocated to manage these aspects. The food system related roles assigned in the past reflected control and policing, effectively issuing of trading permits, authorising construction of food related retail areas, issuing of fines for compliance and non-compliance and managing food safety. As will be discussed later, Cape Town also had control over the Cape Town Fresh Produce Market and the City managed abattoir.

Despite many rural areas being included in the 2000 municipal structures, the small opportunities to embed food in the newly emerging structures was never capitalised on and food and more general food system related aspects were lost as a more urban oriented focus to local government emerged.

The Constitution of South Africa does however allocate a number of responsibilities to local government that are food related.[9] These include governance of markets and abattoirs, but also the following areas that have a direct food systems related aspect:

- Licensing and control of undertakings that sell food to the public
- Local amenities
- Markets
- Municipal abattoirs (note – the last of the City's abattoirs was privatized in 2003)
- Municipal parks and recreation
- Public places
- Refuse removal, refuse dumps and solid waste disposal
- Street trading

However, as will be noted through this review, a number of other municipal governance activities, from planning to economic development, all impact food system outcomes and the ability of citizens to thrive. While officials often face challenges when acting in the absence of a clear and direct mandate, politicians hold a key to acting on the needs of citizens.

### 5.3.3. Political Structures

The City of Cape Town is governed by a 231-member city council elected in a system of mixed-member proportional representation. The city is divided into 116 wards, each of which elects a councillor by first-past-the-post voting. The remaining 115 councillors are elected from party lists so that the total number of councillors for each party is proportional to the number of votes received by that party.

The council is divided into 24 sub-councils which deal with local functions for between three and six wards. A sub-council consists of the ward councillors elected by the by first-past-the-post voting for that specific ward and a similar number of proportionally-elected councillors assigned to the sub-council. A sub-council is chaired by one of the councillors and appoints a manager to run its day-to-day business. A sub-council does not have any inherent responsibilities in law, but it is entitled to make recommendations to the City Council about anything that affects its area. The City Council may also delegate responsibilities to the sub-councils.

The executive authority for the city is vested in an Executive Mayor who is elected by the council. The mayor appoints a mayoral committee whose members oversee various portfolios. A City Manager is appointed in terms of Section 57 of the Municipal Systems Act, by the executive, under the leadership of the mayor, as the non-political head of the city's administration.

The Mayoral Committee consists of 10 members who are appointed by the Executive Mayor. Each member manages a different area of the local government.

### 5.3.4. City operational leadership

The current city manager of Cape Town was formally appointed city manager in April 2018.

The role of the City Manager is to lead City administration. The office of the City Manager is responsible for all aspects of governance, which includes ensuring compliance with statutory requirements and City policies, processes and procedures.

The City Manager is supported by an Executive Management Team (EMT), appointed in terms of Section 57 of the Municipal Systems Act. Each member heads a directorate and is responsible for key functions of the

[9] For a detailed conversation on this, see: https://foodsecurity.ac.za/wp-content/uploads/2019/04/CoE-FS-WP5-Multilevel-Government-Municipalities-and-Food-Security-17-Apr-19.pdf

organisation. These include implementing Council decisions and leading the City's drive to achieve its strategic objectives as outlined each year in the Integrated Development Plan (IDP). It is through the IDP, and the Municipal Spatial Development Framework (MSDF), that the majority of budget related allocations and operational visions (with their associated budgets) are enacted.

Given that there is no ministry of food and food is not actively embedded in mandated aligned tasks, enabling food specific activities that fall outside the IDP means that these are seldom budgeted for. This results in most food system related activities either being designated to private sector actors, or, in the event that these are carried out, these often take the form of projects, or activities that fall within the mandate of other budget lines, such as welfare support. The result is strategic programmatic activities are limited.

However, the current IDP explicitly details food as one of its core projects, Objective 15 - A more spatially integrated and inclusive city and specifically Objective 15.2.B, the Food Systems Project, governed through the Future Planning and Resilience Department.

The operational structure, led by the City Manager and then implemented by the different directorates is detailed in Figure 24 below.

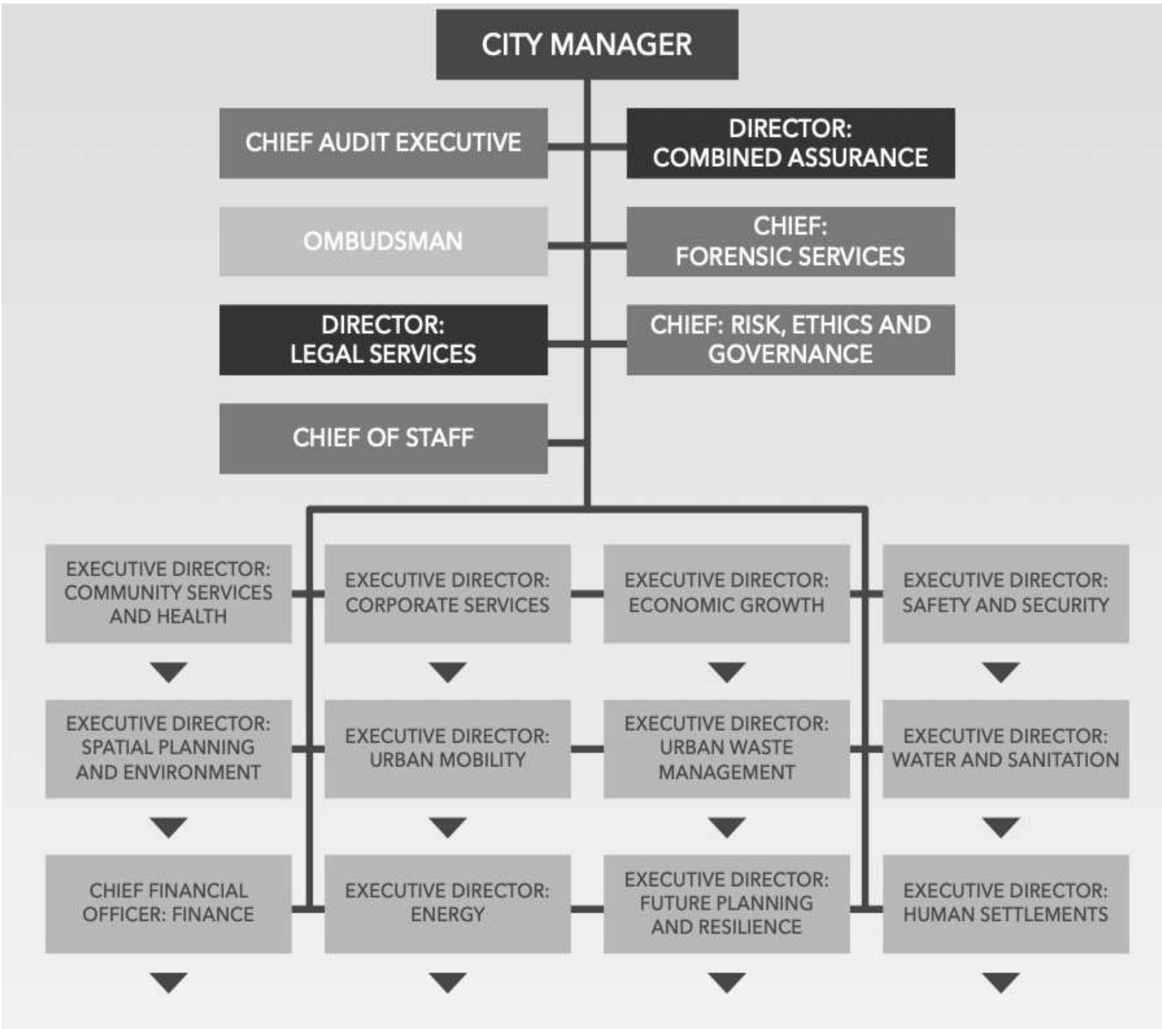



Figure 24: Organogram for the operational management of the City of Cape Town
(Source: City of Cape Town)

## 5.3.5. Overarching report on economy of the City

### Cape Town economy embedded within South African economic environment

Cape Town's economic performance and structures are embedded within those of South Africa, Per the World Bank, weak structural growth and the COVID-19 pandemic have exacerbated socio-economic challenges. South Africa's GDP has recovered to its pre-pandemic levels, but the strength of the recovery has been hindered by multiple structural constraints, including ongoing power shortages and logistics bottlenecks. The recovery in employment continued in 2023 (790,000 jobs were added, leading to a higher level of employment than before the pandemic) but the pace of job creation has not kept up with the growing labour force, resulting in a rising number of unemployed people. The unemployment rate stood at an elevated 32.4% in 2023, with women and youth persistently more impacted. Inequality remains among the highest in the world, and poverty was estimated at 62.7% in 2023, based on the upper-middle-income country poverty line, only slightly below its pandemic peak. These trends have prompted growing social demands for government support, which could put the sustainability of public finances at risk if they are to be met (World Bank, 2023).

Increasingly severe domestic constraints, alongside slowing global demand, led to GDP growth falling to just 0.6% in 2023, from 1.9% in 2022. Mining production contracted while manufacturing production edged higher, as load shedding and transport bottlenecks intensified. The services sectors (financial, transport, and personal) and domestic trade were key drivers of growth. The labour market has remained weak. The employment ratio only increased to 40.8% at the end of 2023, and 39.4% in 2022, from a pandemic low of 35.9% in September 2021 (World Bank, 2023). In this context, the COVID-19 Social Relief of Distress Grant, introduced in May 2020, was extended for another year until March 2025. Socio-economic challenges were further exacerbated by high fuel and food (bread and cereals) prices, which disproportionately affected the poor. Inflation averaged 6.0% in 2023 but stood at 9.3% for those at the bottom 20% of the income distribution (World Bank, 2023).

South Africa has taken considerable strides to improve the well-being of its citizens since its transition to democracy in the mid-1990s, but progress has stagnated in the last decade. The percentage of the population living below the upper-middle-income country poverty line fell from 68% to 56% between 2005 and 2010 but has since trended slightly upwards, to 57% in 2015, and is projected to have reached 62.7% in 2023 (World Bank, 2023).

Structural challenges and weak growth have undermined progress in reducing poverty, heightened by the COVID-19 pandemic. The achievement of progress in household welfare is severely constrained by rising unemployment, which reached 32.1% in the fourth quarter of 2023, above the already high pre-pandemic rates. The unemployment rate is highest among youths aged between 15 and 24, at 59.4%.
Other structural challenges have also increased, including transport and logistics, which have deteriorated due to weak management of the state-owned enterprise Transnet, theft, and sabotage, constraining South Africa's export capacity (World Bank, 2023).

South Africa remains a dual economy with one of the highest and most persistent inequality rates in the world, with a consumption expenditure Gini coefficient of 0.67 in 2018. High inequality is perpetuated by a legacy of exclusion and the nature of economic growth, which is not pro-poor and does not generate sufficient jobs. Inequality in wealth is even higher, and intergenerational mobility is low, meaning inequalities are passed down from generation to generation with little change over time (World Bank, 2023).

## Cape Town economic overview

Cape Town is South Africa's second largest municipal economy and the second most important contributor to national employment, contributing 9,5% (EGS – Baseline Statistics 2019). Cape Town's economic landscape and growth or real GDP has grown at higher rates than the national average thanks to its competitive advantage over the rest of the country in certain sectors and industries. These include several manufacturing sub-sectors such as electronic and electrical products, metal, steel and beverages. Some of the positive current growth prospects for Cape Town include:

- Increased share of national economy
- Continued rise in new company registrations
- Several new large investment projects
- A steadily growing digitech sector
- Rapidly expanding B2B and B2C e-Commerce
- Increased exports and improved trade balance

## Economic performance and comparative information

Whilst GDP data is not available at the city-level on a quarterly basis, annually, Cape Town typically contributes around 70% of the provincial GDP. During the first quarter of 2019, the Western Cape had a quarter-on-quarter GDP growth rate of -2,7%, compared to a national growth rate of -3,2%. In 2018, South Africa had a GDP per capita, of R84 976, while the Western Cape's GDP per capita was R100 789 and Cape Town's was R108 802.

While this higher than average per capita GDP may read as positive, the reality is that given the high levels of inequality, this does not mean that everyone in the CCT shares this same elevated GDP result. In 2018 South Africa had a Gini coefficient of 0,63, while Cape Town had only a marginally lower value of 0,62.

In terms of employment, both formal and informal, Cape Town ranks highest of all South African cities at 9,7%. of total employment in the country although Cape Town's GDP was lower than a number of other cities in South Africa (Figure 25).

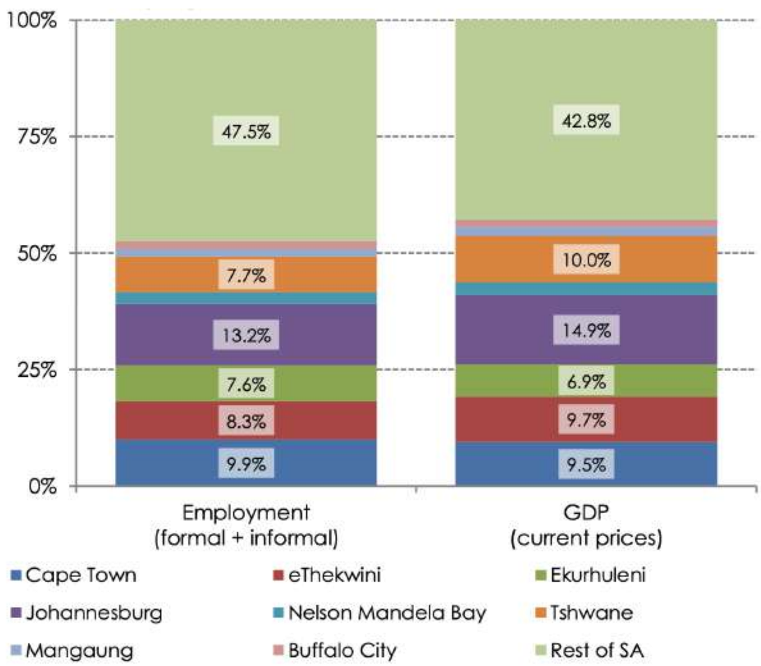



Figure 25: Cape Town gross geographic product & employment contributions to SA, 2018

When considering the sectoral shares of different industrial and business sectors in Cape Town from a gross value added (GVA) perspective and comparing these to the 2018 = national GVA, the importance of the finance, trade and manufacturing sectors is evident (Figure 26) reflecting the tertiary sector nature of the economy, offering a possible explanation for the high Gini coefficient, despite higher than average employment. A large portion of the formal and informal employed are in seasonal work and at what could be considered entry level work.

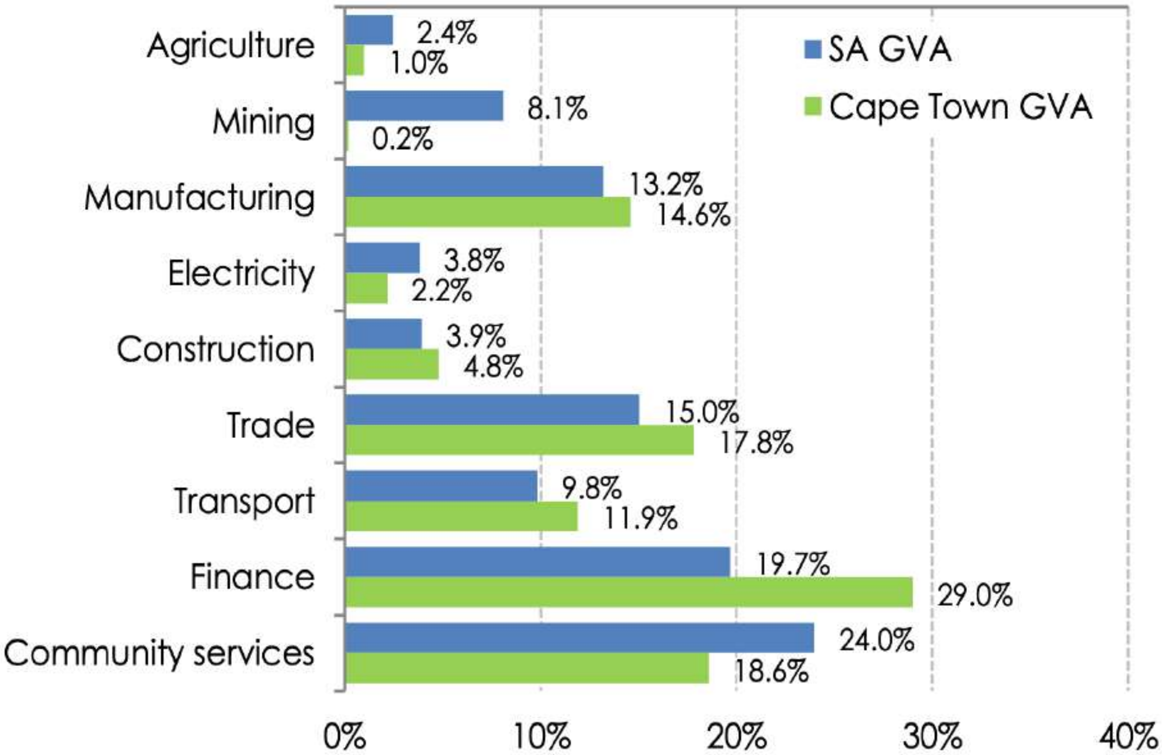



Figure 26: Sectoral shares of Cape Town gross value added (GVA) versus national GVA, 2018
(Source: Cape Town Tourism and Wesgro, 2019.)

That Cape Town and South Africa are in challenging economic times, effectively in recession, is borne out in Figure 27 detailing the declining numbers in employment, despite an increase in the working age. Further one of the only sectors to reflect increased employment was the informal sector, a sector that generally grows with the formal labour market contracts, as evident in the related statistics. While it could be argued that the year on year figures potentially indicate a slight improvement, these marginal improvements were effectively eliminated thanks to the wider economic impact of the COVID-19 pandemic.

| 2019 Quarter 1 | | South Africa | | | Cape Town | | |
|---|---|---|---|---|---|---|---|
| | | Recorded | Q-on-Q | Y-on-Y | Recorded | Q-on-Q | Y-on-Y |
| Number (thousands, '000's) | Working-age population | 38 283 | ↑ 149 | ↑ 605 | 2 940 | ↑ 14 | ↑ 555 |
| | Labour Force | 22 492 | ↓ -176 | ↑ 134 | 2 010 | ↓ -16 | ↓ -39 |
| | Employed: total | 16 291 | ↓ -238 | ↓ -86 | 1 584 | ↓ -13 | ↓ -6 |
| | Employed: Formal sector | 11 220 | ↓ -126 | ↓ -135 | 1 303 | ↓ -18 | ↑ 16 |
| | Employed: Informal sector | 2 933 | ↓ -68 | ↑ 32 | 187 | ↑ 14 | ↓ -2 |
| | Unemployed | 6 201 | ↑ 62 | ↑ 220 | 426 | ↓ -3 | ↓ -33 |
| | Not economically active | 15 791 | ↑ 325 | ↑ 470 | 930 | ↑ 30 | ↑ 95 |
| | Discouraged work-seekers | 2 997 | ↑ 156 | ↑ 210 | 24 | ↑ 7 | ↑ 9 |
| | Other not economically active | 12 793 | ↑ 169 | ↑ 260 | 906 | ↑ 23 | ↑ 85 |
| Rate (percentage, %) | Official/strict unemployment | 27,6 | ↑ 0,5 | ↑ 0,9 | 21,2 | – 0,0 | ↓ -1,2 |
| | Broad/expanded Unemployment | 38,0 | ↑ 1,0 | ↑ 1,3 | 23,4 | ↑ 0,3 | ↓ -0,4 |
| | Absorption | 42,6 | ↓ -0,7 | ↓ -0,9 | 53,9 | ↓ -0,7 | ↓ -1,2 |
| | Labour Force Participation | 58,8 | ↓ -0,6 | ↓ -0,5 | 68,4 | ↓ -0,8 | ↓ -2,6 |
| ↑ increase | ↓ decrease | improvement | deterioration | – No change (due to rounding) | | | |

Figure 27: Cape Town employment information in comparison to national information for 2019 (Source CCT, 2019)

More specific Cape Town reports on the impact of the COVID-19 pandemic are currently under review. However the NIDS CRAM surveys, capturing details of the economic challenges, and others, encountered over COVID-19 offer important indicators of the challenges:

In terms of the relations between livelihoods and place,

> COVID-19 has exposed the fault lines that distinguish the lives and livelihoods of different social and racial groups in South Africa. Analysis of the pandemic's stark spatial divides has been neglected in comparison. Yet the crisis has unfolded in different ways across the country, and the inequalities in income and well-being between social groups have tended to get accentuated by the differences between places. A sobering message is that many people and places throughout the country remain vulnerable to hardship and misery, and that the poorest communities have suffered most during the crisis. Urban shack dwellers stand out as being at particular risk of harm and have been most severely impacted all-round.
>
> (Visagie and Turok, 2021: 1)

On Gendered related challenges

> Women in South Africa were particularly hard hit [by COVID-19]. Relative to men, they were much more likely to lose their jobs during the initial strict lockdown phase, and their recovery was slower as the economy started to reopen. Despite these uneven effects in the labour market, women were less likely than men to benefit from the COVID-specific government income support measures put in place to help cushion the blow to unemployed and furloughed workers. In addition to these gendered outcomes, there were also inequalities in the home. The time that women spend on childcare was found to be relatively more responsive to school closures and reopenings than the

time men spend on childcare, with far more women than men citing childcare responsibilities as a constraint to their labour market activities. … in March 2021, men's employment and working hours were back to pre-COVID levels, while women's employment and working hours remained below the February 2020 baseline figures.

(Casale and Shepherd 2021: ii)

On labour market uncertainty

> Results using NIDS-CRAM show that the labour market in South Africa is very responsive to Lockdown regulations, fluctuating dramatically when bans or restrictions on trading hours and curfews are put in place, while recovering relatively quickly when they are relaxed. The QLFS shows that employment rates in South Africa have still not recovered to their pre-pandemic levels, remaining at approximately 10 percent below pre-pandemic levels for the population as a whole. This points to the fact that lockdown restrictions can have tremendously negative economic impacts that are difficult to recover from over the course of a year, and that wherever possible, all efforts should be made to geographically differentiate Lockdown levels to minimize their national impact, while maximizing the potential for localized economic recoveries.

(Daniels, Ingle, & Brophy, 2021)

Combined these three reports offer insights into the impact that COVID-19 had on the economy and while the NIDS CRAM studies reflect that national picture, similar dynamics have been described in fieldwork during the Pandemic in Cape Town (Battersby et al, 2022).[10]


Greenmarket square Cape Town
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

[10] Articles in press originating from the Nourished Child Project.

## 5.4. City Infrastructure report

In a review of food security data drawn from a survey of 6453 households eleven Southern African cities Frayne and McCordic (2015) found that infrastructure access significantly predicted HFIAP (food access) and MAHFP (food access frequency) scores. Through regression analyses the authors demonstrated that households with inconsistent or no access to a cash income, cooking fuel, medical care, electricity, or water had 11 times greater odds of being categorized as food insecure in the HFIAP and 8.5 times greater odds of having less than 12 months of adequate food provisioning in the last year (Frayne and McCordic, 2015). The review of the data showed that household income alone does not sufficiently account for these relationships. Importantly, the impact of social and physical infrastructure on household food security was significant and the infrastructural conditions of the urban environment in the eleven cities, of which Cape Town was one, better explained (and enabled greater predictability) urban household food security than household income alone Frayne and McCordic, 2015).

For this reason, infrastructure is a key consideration when engaging the food system. In addition, from governance perspective, the South African food security policy architecture is dated and still focuses disproportionately on production as a food security intervention. As such, for cities to play an active and mandated role in food security, and abide by their Constitutional obligations (as detailed by De Visser, 2019), focusing on areas for which the city has a direct mandate is essential. Infrastructure is one such mandated domain.

This next section captures the City of Cape Town description of their infrastructure landscape, as drawn from various city scale infrastructure reports.

Cape Town is often promoted as the gateway to South Africa, and to Africa more generally. This status is sustained by the city's well-developed transportation infrastructure, with Cape Town being home to South Africa's second-busiest airport as well as (historically) its second- busiest container port.

Container traffic is very seasonal, thus it is best to compare total containers handled over the period of a year. The number of containers handled at the Port of Cape Town decreased from 250 874 in the first quarter of 2018 to 214 592 in the first quarter of 2019, reflecting a negative growth rate of 14.46%. In the first quarter of 2019, the Port of Durban4 was once again the largest container handling port in the country (comprising 59,70% of all containers handled in South Africa), followed by the Port of Cape Town (20,26%) and the Port of Ngqura (16,18%).

The Port of Durban handled 632 295 twenty-foot equivalent units (TEUs6) in the first quarter of 2019, recording a decrease in container handling of 15,13% compared to the same period in 2018. Similarly, the ports of Cape Town and Ngqura experienced decreases in container handling, contributing towards a year-on-year decrease of 15,97% in total container handling at a national scale in the first quarter of 2019 and reflecting challenging economic conditions.

Cape Town International Airport is South Africa's second-busiest airport, after OR Tambo International Airport in Johannesburg. It recorded 2,86 million total passenger movements in the first quarter of 2019 compared to 5,16 million passenger movements at OR Tambo International and 1,49 million at King Shaka International airports during the same period.

Cape Town recently experienced its worst drought in recorded history, with the economy still recovering from some of the related negative impacts. The City of Cape Town (City/CCT) has had a range of demand and supply-side management instruments in place for a number of years to enable the sustainable provision of water; however, in light of the severity of the drought and the impact this had on dam levels, a number of these measures had to be accelerated. Importantly, a number of factors and interventions can be credited with the aversion of the so-called "day zero", a very real prospect (Shepherd, 2021). These different factors are outside the scope of this report but the key lesson learnt from the Day Zero concerns were that physical, structural, economic, governance and social processes needed to be facilitated and their combination carefully managed so as to achieve resolution to what has been described as a "Mad Max" type spectre (Shepherd, 2021). The City continues to work on determining the best approach for securing water resilience for the water supply system, which has culminated in the recent drafting of a Water Strategy for Cape Town (CCT, 2019a).

Diverse residential structures and economies intersect are key sites of infrastructure in Cape Town
(Source: CCT:IR, 2022)

The economic growth data for the first quarter of 2019 highlights that output at a national level in the construction industry declined by 2,2% quarter-on-quarter - the sector's third consecutive quarter of negative growth. On a year-on-year basis the sector recorded its eighth consecutive contraction (-0,8%). Mirroring national trends, the Western Cape's construction industry contracted by 2,3% quarter-on-quarter and 0,9% year-on-year in the first quarter of 2019 (Quantec, 2019). After dropping to 32 points in the fourth quarter of 2018, the First National Bank (FNB)/BER composite Building Confidence Index (BCI)14 (BER, 2019b) declined by a further 7 points to record 25 index points in the first quarter of 2019, its lowest recording in nearly eight years. According to the BER, the drop in the index was largely driven by the declining sentiment among building material manufacturers and retailers of hardware.

In the City of Cape Town's 2022 Infrastructure Report, the dire state of infrastructure and the challenges associated with infrastructure delivery and associated maintenance were set out. It is outside the scope of this report to comment on the reasons given by the City of such a state of infrastructure. The apartheid legacy still impacts partial and infrastructural inequities. However, after nearly 30 years of democratic, equity focused democratic government, the inequities in infrastructure delivery, servicing and maintenance remain.

It is acknowledged that the COVID-19 pandemic impacted both delivery plans and infrastructure maintenance. This backlog will take significant time to address. Further, a number of critical infrastructural challenges exist.

> Key historical challenges include inadequate spending commitments, policy uncertainties, and a lack of precise data on the state, quality and performance of existing assets. The Covid-19 pandemic added another layer of complexity by significantly affecting infrastructure development. This has highlighted the critical importance of many infrastructure systems and services, both for maintaining economic and social activity, and enabling responses to unexpected threats and challenges.
>
> (CCT, 2022: 14)

Provision of energy services is one factor, however, the levels of delivery, as a result of load shedding places additional burdens on residents of the City, despite the City's active efforts to mitigate the impacts
(Source: CCT:IR, 2022)

A number of key infrastructural challenges, detailed by the City as key areas of focus (and concern) include the following:

- Several new energy generation projects have entered the portfolio in the last year, which are either in the tendering or feasibility stage.
- Challenges regarding landfill space remain a challenge for Urban Waste Management. Additional cells have been completed at Coastal Park landfill, which will provide some airspace capacity increase, but these cannot move into operation until the national Department of Water and Sanitation provides approval for landfill activities at these cells. Similar delays will potentially also

be experienced at Vissershok landfill once the cells currently under development reach completion.

- The purchase and development of a regional landfill site should be a critical priority for the Urban Waste Management directorate going forward. The project has currently reverted to feasibility, with a site for development yet to be determined.

- Similarly, refuse transfer and drop off is another area of challenge for Urban Waste Management. With the exception of Swartklip, there are no current projects for additional refuse transfer stations (RTSs) or drop- off facilities that are targeted for completion before 2028. This means that there will be a five-year period during which no additional disposal and drop-off capacity will be added citywide, which is a concern. While the City is currently meeting demand, the population, and therefore demand, will grow over this five-year period and the goal of decreasing the service radius from 7 km to 3 km will also not be achieved until then.

- There has been a significant increase in the planned capital expenditure over the 10-year portfolio in Water and Sanitation. This is largely driven by increased pipe replacement and pump station-related projects aimed at reducing the frequency, duration and impact of sewer spills.

- Projects to diversify Cape Town's water supply remain on track.

- Due to budget constraints, projects in the bulk water section of the portfolio are being prioritised to target areas of greatest need first.

- Wastewater sludge treatment remains an area of significant concern, with further delays having been experienced in the development of the first biosolids beneficiation facility.

- Stormwater master planning remains a priority but has not progressed since last year's report due to ongoing budget constraints.

- A full review of the Human Settlements Sector Plan has commenced. This aims to address the gaps identified in last year's report and will form the basis on which projects for the outer years of the portfolio will be developed.

- There have been significant additions to the outer years of the Urban Mobility capital pipeline since last year, a number of which relate to improved public transport.

As can be seen from the City report, there are significant areas of concern as these pertain to infrastructure. Budget constraints, planning and intergovernmental cooperation remain as key areas driving blockages and the inability to meet infrastructural needs.

It is important to note that food is not mentioned in this report and linkages to food and the functioning of the food system are not made. This is an omission for a number of reasons. The main reason for concern is the fact that the absence of a food specific focus, even the linking of food to infrastructure arguably reflects a very narrow interpretation of what food and food security means for the city. The City's MSDF is cited as driving the approach to infrastructure in the city where the MSDF priorities are detailed as follows:

The City's MSDF is built on three foundational strategies:

1. Plan for economic growth and improve access to economic opportunities.
2. Manage urban growth, and create a balance between urban development, food security and environmental protection.
3. Build an inclusive, integrated, vibrant and healthy city.

(CCT,: IR 2023, 2023: 13)

As such, the 2023 City of Cape Town Infrastructure report offers no sense of how infrastructure will be planned to enable the City to "Manage urban growth, and create a balance between urban development, food security and environmental protection." (CCT:IR, 2023: 13).

This is perhaps due to the limited view of the role that food plays in infrastructure. This was confirmed in conversations with drafters of the City Infrastructure report who questioned the role of food in infrastructure or the role of infrastructure in food security. Perhaps as a result of this, food is mentioned only once in the 2023 City of Cape Town State of Infrastructure report, and when mentioned, the mention was in quoting the MSDF. Nutrition is not mentioned at all and health on three occasions, once when referencing the same MSDF priorities and twice in a table detailing a community facility. Health is not mentioned as connected to infrastructure in any way.

The City argues that approximately 40% of the City's planned infrastructure projects in the portfolio contribute to strengthening its ability to respond to climatic shock events in the future. However, while infrastructure responses have been developed to prepare the City for higher frequency and intensity of drought shocks, such planning is less developed for the other four climate shocks that the City is expected to experience in the future.

Investment in bulk infrastructure are hamstrung by financing challenges
(Source: CCT:IR, 2023)

From an infrastructure financing perspective Figure 28 depicts the financial year 2022/23 Capital Budget Funding Sources. The significant variance between collected revenues used to fund infrastructure and the funding received through either grants or external financing offers insight into the challenge associated with effective development and maintenance of infrastructure. The need to raise funds, or work to fund infrastructure through grant funding places the city in a particularly vulnerable state. The value of infrastructure funded in the 2022/23 financial year was R5,2 billion (CCT:IR, 2023).

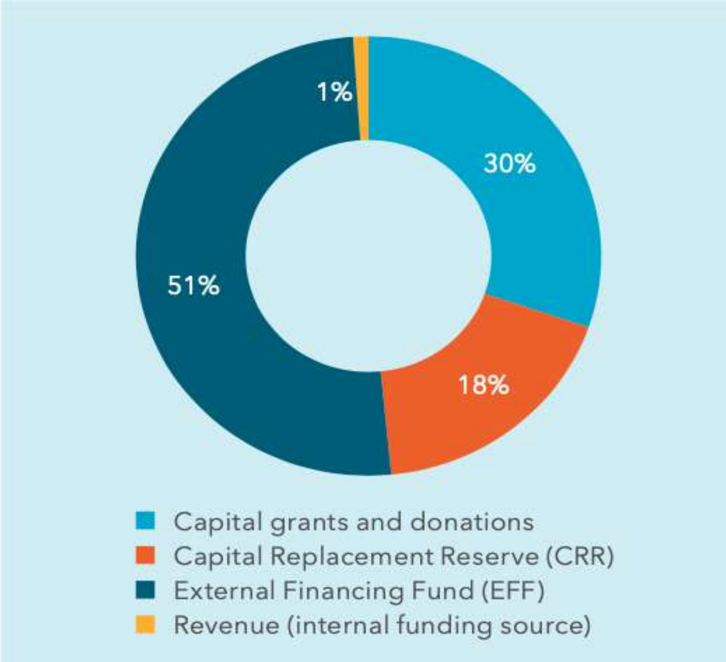



Figure 28: Capital Budget Funding Sources (Source CCT:IR, 2023: 12)

The largest contributor to the spending was the Water and Sanitation Directorate (R2,2 billion in 2022/23), followed by Urban Mobility (R955 million in 2022/23) and Energy (R915,7 million in 2022/23). This is depicted in Figure 29.

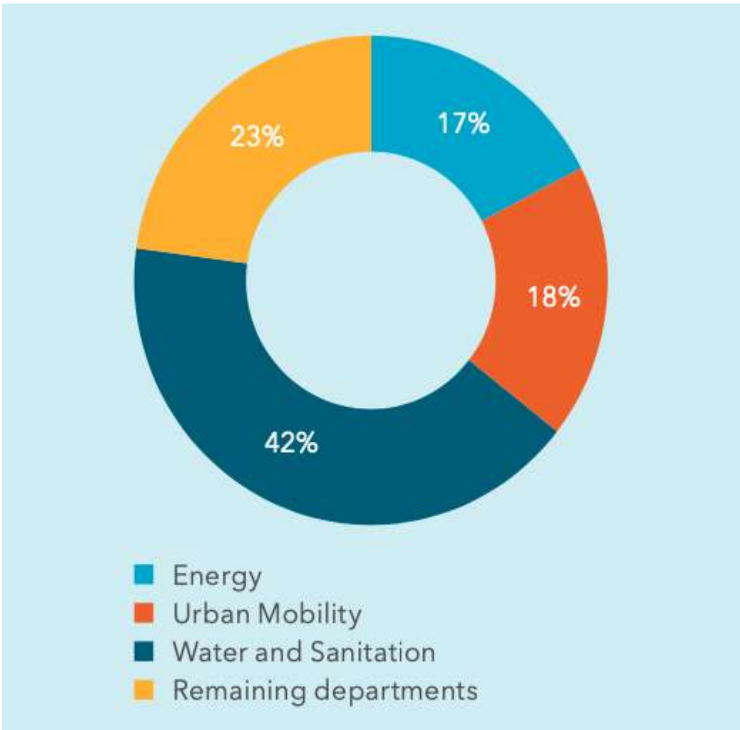



Figure 29:  City of Cape Town Infrastructure spending distribution (Source: CCT:IR, 2023: 12)

While there is no denying that given the scale of growth and the legacies of under investment in infrastructure, infrastructure investment is needed to first ,enable redress to those areas historically underserved by infrastructure, and secondly, to ensure that investment is able to both maintain existing infrastructure and enable a quality of life. However, it is striking to note that in no place is food infrastructure listed and perhaps more problematically, the connection to food, the food system, to health and nutrition and the intersection between infrastructure and these outcomes, outcomes that serve as key pillars of Cape Town's Integrated Development Plan, namely, "City of Hope for all – a prosperous, inclusive and *healthy city* where people can see their *hopes of a better future* for themselves, their children and their community become a reality" (CCT, 2022: 15 - emphasis added)[11] is either disregarded, or more problematically, are not seen by those within the policy department of the City of Cape Town, responsible for long term strategic planning.

The balancing act between investment in new infrastructure, upgrading existing infrastructure and maintaining existing infrastructure is depicted in Figure 30. This reflects the challenge faced by a city such as Cape Town where internal revenue generation is woefully insufficient to fund the infrastructure system and, as per Figure 28, external funding is needed to enable effective infrastructure delivery.

Scholars purchasing street foods for breakfast on route to school in a neighbourhood in Cape Town. These foods are mostly deep fried and energy dense. The choice is driven by many factors but long commutes to school, limited access to reliable energy (for cooking and storage of fresh foods) in their informal settlement homes, and time poverty all contribute to the choices being made (Source: Samantha Reinders for Consuming Urban Poverty – not for re-use)

This "regime" has three implications. The first is that infrastructure investment is limited and directly aligned with Constitutional mandates. Risk averse city officials will not invest in any form of infrastructure if this falls outside the mandated areas of focus. In this instance, food, food security and nutrition security, are clearly unfunded mandates and as such, not considered as specific infrastructure investment sites. Secondly, such loan regimes mean that essential infrastructure is often directed at sites where revenues can be gathered so as to enable repayments on loans. This results in a form of splintered urbanism where, despite a rhetoric of redress and equity, the reality is different. Given that this applies to general and not food specific infrastructure, the consequences of urban food system decisions, as these relate to infrastructure, specifically for energy, water and transport, result in limited choice and reduced food choices. These choices are not aligned to known health and nutrition benefits, but to the delicate dance of balancing household budgets and time. Finally, such processes serve food system actors, such as the private

[11] See also: https://www.youtube.com/watch?v=0GuVmeUp_KE&t=4s

sector, specifically big food, and this then accelerates challenges such as the nutrition transition. This can be seen in an assessment of the NOVA classifications and how supermarket specials and discounts are dominated by foods that fall in the NOVA 3 (processed foods) and NOVA 4 (ultra-processed foods) categories (Frank et al, 2024).

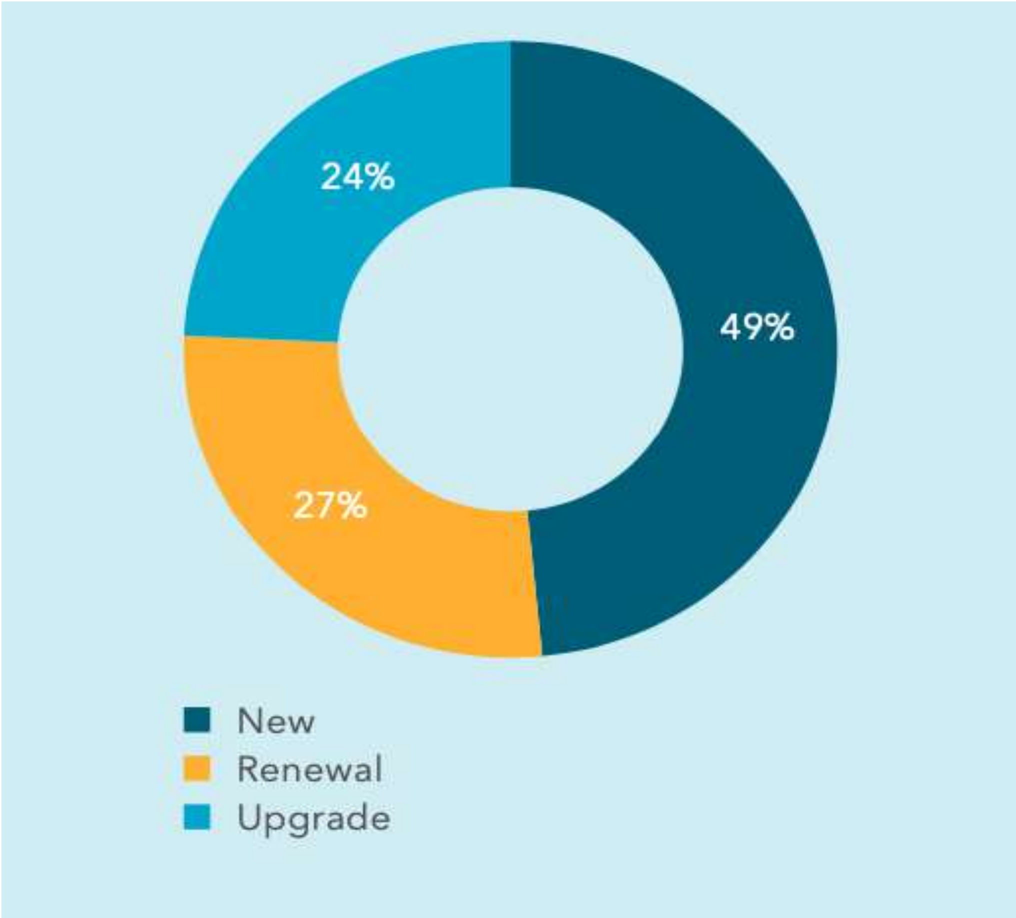



Figure 30: City of Cape Town Categories of Capital Allocation (Source: CCT:IR, 2023)

Capital allocation and the role of funding in infrastructure is however, not limited to infrastructure investment by the City alone. Given the state of infrastructure and the associated delivery challenges, the City of Cape Town are also incentivising other infrastructure investments.

The case of load shedding in Cape Town is a particular case in point. Here the City is offering significant tax breaks, while at the same time purchasing solar generated energy, from private sector actors, and even individual households, that connect to the grid. The City's purchase agreements for solar generated energy means that the tariff pays 87c per kwh (excl VAT) plus a further incentive of an additional 25c in place until 2025. The City has also reworked their approach and is now allowing consumers to offset their credit against their municipal bill and is moving further to pay out any remaining credit over a year period after the municipal account is offset.

Driven in part by the load shedding crisis, but also other factors such as a move to more sustainable energy and a green agenda, as well as cost considerations, the growth in solar generation in Cape Town has been significant. Figure 31 details the growth in installed solar generation between the periods 2013 - 2023.

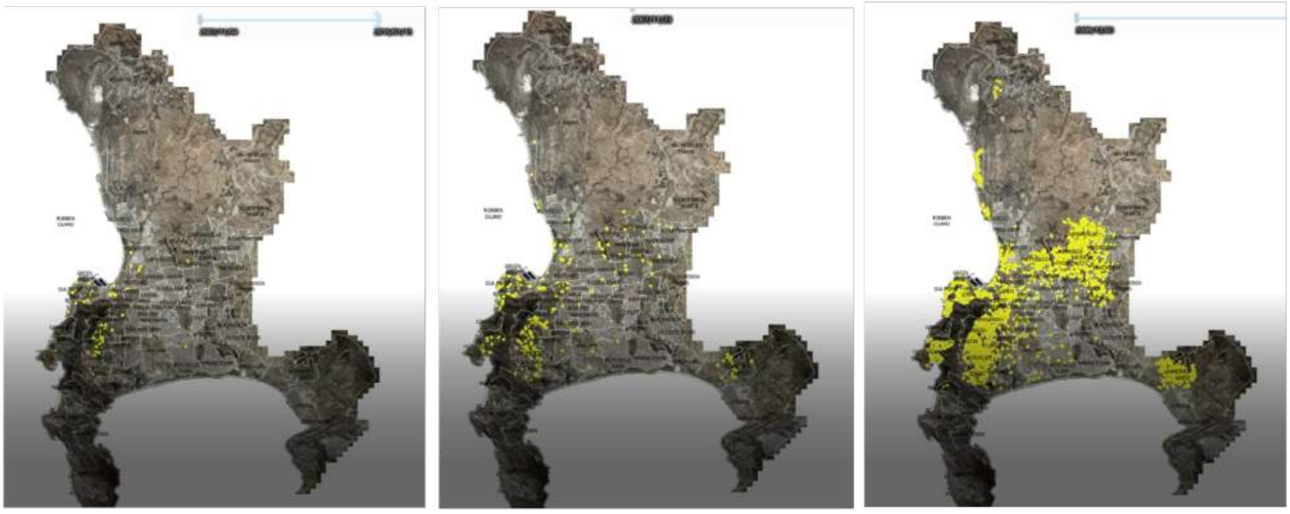


Figure 31: Transition in City purchasing of installed Solar Generation between 2013 and 2023 (Source: City of Cape Town, 2024)

Within the context of the wider AfriFOODLinks project is to "Improve the form and function of specific food environments, in collaboration with informal systems, to improve physical and economic access to nourishing foods, resilience of food systems, encouraging uptake of sustainable healthy diets and practices, *while demonstrating that environmental regeneration is possible through transforming food systems"* (AfriFOODLinks, 2022 - project proposal). This ambition is a key consideration for Cape Town but given the nature of infrastructure and the limitations imposed by infrastructure does require that the Cape Town AfriFOODlinks team consider how such processes of environmental regeneration can be activated. This creates an important tension that the AfriFOODLinks knowledge and experiment implementation teams need to consider. Do we as project partners view our task as one of highlighting infrastructural deficiencies and specifically stressing the need to ensure connections between the urban food system and the infrastructure systems are made, or do we actively work to chart new pathways that offer innovative modes of aligning infrastructure and food system needs that can serve as new modes of proactive for City of Cape Town officials and actors.

Pragmatically, it is expected that we would require both. However, this does mean that work in the innovation, governance, food environments and knowledge  project teams need to align to ensure the most ideal and beneficial project outcomes.

A traditional landfill site in Cape Town. While this is well managed, the scale and volume of items diverted to landfill remains a challenge
(Source: CCT:IR, 2022)

While the generation of reports such as the City of Cape Town Infrastructure report are acknowledged as essential planning and strategic tools, as well as offering open and transparent information on funding and prioritisation, there is a fundamental flaw in the approach to infrastructure in the City of Cape Town. While the City of Cape Town holds, as its overarching goals, the values of "City of Hope for all – a prosperous, inclusive and healthy city where people can see their hopes of a better future for themselves, their children and their community become a reality." (CCT:IDP, 2022: 15), embedded in the hierarchy of focus areas as detailed in Figure 32, the infrastructure objective and principle motivator reflects a more "trickle down" approach where the primary focus of infrastructure development is principally focused on economic development and not overarching city welfare and development. This tension is effectively captured in the following statement that concludes the City of Cape Town 2023 Mayoral Infrastructure report "The City of Cape Town remains committed to enhancing infrastructure planning, preparation and delivery in order to stimulate growth and support inclusive economic development" (CCT:IR, 2023: 73).

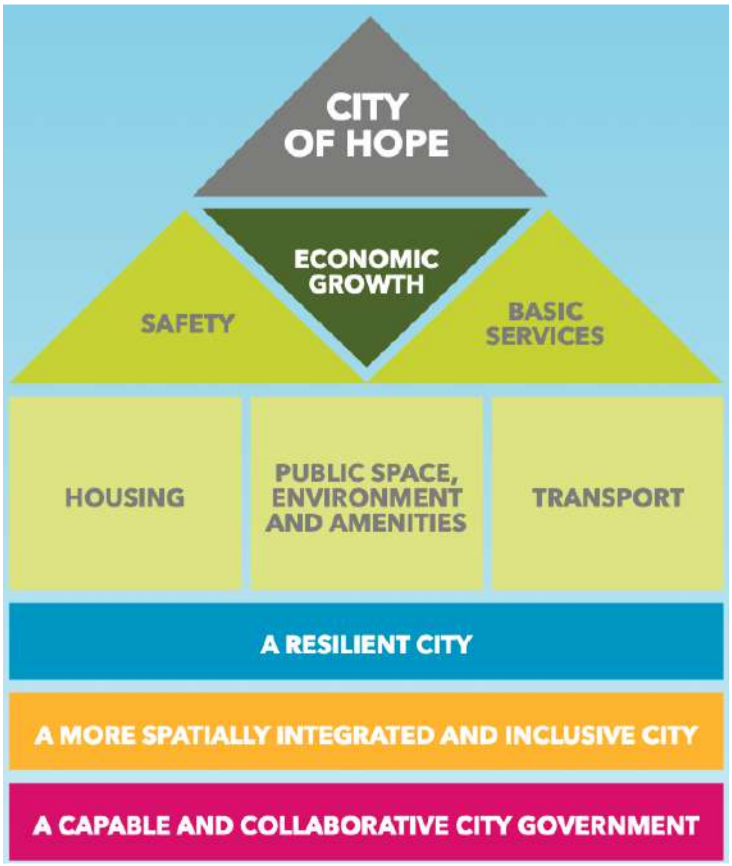



Figure 32: City of Cape Town Integrated Development Plan approach and prioritisation, as depicted in a hierarchy of actions (Source: CCT:IDP, 2023)

The state of infrastructure in Cape Town and the preceding detail sits within the context of a significant shortfall in service provision, felt most acutely in the context of infrastructure. Existing research reveals that there has been increasing community impatience related to basic municipal service delivery in developing countries, for example, South Africa. Many scholars have argued that the rise in service delivery protests in South Africa can be attributed to organisational failure to provide satisfactory basic services because many communities remain un-serviced (Masiya et al, 2019).

In a review of service delivery in South Africa. The following factors were detailed:

- Planning and land tenure:

In many cities, informal settlements do not have security of tenure and do not form part of conventional planning processes. This tenure insecurity can cause several crises including forced evictions, lack of community/household/ and state investment, and lack of sense of urban citizenship (Durand-Lasserve and Royson, 2012).

- Infrastructure:

Many informal settlements lack services and infrastructure. This includes networked services, such as water, sanitation, drainage, electricity, roads and transportation. In many informal settlements, these services are provided through informal channels at high prices. In addition to 'hard infrastructure', social services (health, education, and safety facilities), are also under catered. Most importantly, it is not only access to infrastructure that is important, but the design of this infrastructure. Appropriate design can contribute to place-making, community cohesion and livelihood creation. Likewise, unresponsive and crude design can hamper social and economic processes at local level (Smit, 2006).

- Top structure/housing:

Shelter in informal settlements tends to be inadequate. This is due to low effective demand (i.e. low income and lack of finance) and the lack of incentives for households to improve their dwellings (either because they are renters or because they do not have secure tenure). However, most upgrading programmes do not seek to directly improve housing or structures, instead focussing on services. Importantly, adequate housing provides an important function, including protecting households from the elements and other dangers and creating social/economic and even financial assets for households. The design of housing typologies is also a critical part of urban densification and spatial formation, enabling, for example, vertical consolidation.

- Community participation:

Community involvement is often seen to an end, or a necessary 'check box' in development projects. However, the process of involving communities in the upgrading process requires special design and can, if done well, form a critical component of community capacity building, necessary for supporting the project and the settlement into the future (Cooke and Kothari, 2001; Cornwall and Brock, 2009).

Given that consistent access to all social and physical infrastructure resources and services was a much stronger predictor of household food security than the income category of a household alone, and that. given that access to a cash income and medical care were very strong predictors of household food security (exceeded only by access to cooking fuel)(Frayne & McCordic, 2015) - the causal relationship between infrastructure and food security at the household level (Tacoli et al., 2013) – understanding the nature and form of food security in Cape Town is a necessary when trying to understand the wider urban food system of the city.

## 5.5. Food and nutrition security

## 5.5.1. Food security within the wider South African food system

South African agriculture has gone through a significant transformation within the past 30 years. These changes impact directly on the role of agriculture and how agriculture is practiced. There are a number of viewpoints on the role of agriculture within South Africa, these different viewpoints shape the food system and its relationship to food security (Battersby et al, 2014). Agriculture is viewed by some as a critical economic sector (see PGWC 2010) and as a major source of rural employment and rural development (NDP 2012). It is viewed by others as a means of post-apartheid redistribution (Department of Rural Development and Land Reform undated), and still others as a source of food security (DAFF undated).

For most of the 20$^{th}$ century, South African agricultural policy was dualistic in nature, a dualism supported by legislation such as the 1913 and 1936 Land Acts, the 1937 Agricultural Marketing Act, the 1939 Agricultural Co-operative's Act and the 1970 Act on the Subdivision of Agricultural Land (Aihoon et al 2009). This dualism was even more aggressively asserted through the 1984 White Paper on Agricultural Policy (Battersby et al, 2013). This policy identified 'white' commercial farming as a vehicle to reach "self-sufficiency in respect of food, fibre and beverages and the supply of raw materials to local industries at reasonable prices". A key means of controlling prices was the Agricultural Marketing Act (Act 59 of 1968 as amended) which allowed for marketing control of commodities enforcing strict price control through 23 marketing schemes (Kirsten & Van Zyl 1996).

Beginning in the mid-1980s, international political and economic pressures, under the auspices of the World Trade Organisation, precipitated a deregulation of the agricultural sector in South Africa (Battersby et al, 2014). The macroeconomic trend of market liberalisation eroded state control over the agricultural sector. In line with this, the General Agreement on Tariffs and Trade (GATT) negotiations, which intended to replace quantitative control on external trade with tariffs, and the appointment of the Committee of Inquiry into the Marketing Act, were key drivers of agricultural market deregulation in the early nineties (Kirsten & Van Zyl 1996). The Marketing of Agricultural Products Act (Act No. 47 of 1996), as well as the 2001 Strategic Plan for Agriculture paved the way for the development of liberalised and "open" (competitive) agricultural markets aimed primarily at greater foreign trade in agricultural products as opposed to the strategy of self-sufficiency necessitated by apartheid isolation (Battersby et al, 2014). The 2001 Strategic Plan for Agriculture (DoA 2001) is arguably the most far-reaching adoption of a deregulated and liberalised agricultural sector in South Africa since the policy shift of the 1990s, envisioning and calling for "market forces to direct business activity and resource allocation (Battersby et al, 2014).

After deregulation, the prices of field crops adjusted downwards to world market levels. This resulted in commercial farmers shifting to minimum interventions production systems, This was accompanied by an on-farm shift in field crop production to better quality soils and a second shift in production out of more marginal areas. The result of this has been a simultaneous consolidation in large commercial (industrial) farms and an increase in the number of smaller commercial farms, precipitating an overall increase in the average farm size (Vink and van Rooyen 2009).

The concentration of the food system and the consolidation that has taken place was driven by the deregulation that occurred post the 1994 transition. The dismantling of trade barriers and protection, following more liberalized trade policies, was intended to facilitate a more equal agricultural landscape. In hindsight, this has not been the case (Battersby et al, 2014).

The impact of this liberalisation and the role played by international agreements such as GATT is particularly relevant to agriculture in the Western Cape (Battersby et al, 2013). The Western Cape, with its largely export oriented Agricultural profile, faces significant exposure to these open markets driven largely by the potential consequences to the region brought on as a result of being subject to agreements negotiated at an international scale (Battersby et al, 2014). Formal agriculture in the Western Cape is a significant export commodity and much of agricultural production is structured for export, either in its harvested form or beneficiated in accordance with the specific product, such as wine (Battersby et al, 2014). The export orientation means that farmers within the Western Cape have to ensure productivity and success within the context of international trade policies and mandates (Battersby et al, 2014).

The National Development Plan (NDP) articulates agriculture as being a key driver of rural development and critically assumes a successful land reform intervention (Battersby et al, 2014). Secondly, the overall agricultural programme envisaged within the NDP targets the creation of just under one million jobs. A large portion of the growth within the agricultural sector is premised on the expansion of a basket of products that are what may be considered export oriented products (Battersby et al, 2014). The matrix used to determine products with high growth potential and high job creation potential list only a few crops, of a total of 18, that make up the Western Cape produce mix, namely apples, pears and table grapes. Vegetables are deemed to have some growth potential but high labour potential (Battersby et al, 2014).

The nature of agriculture and the profile of the agricultural economy in South Africa presents a number of contradictions. These have significant impacts on how food and nutrition security are approached and engaged. The policy landscape in South Africa is nothing less than highly contradictory. The National Department of Agriculture, Land Reform and Rural Development (DALRRD), the key department mandated to address food security, view food security and the attainment thereof as being achieved through the empowerment of small scale farmers and a localised agricultural economy, supplemented by imports. For the DALRRD, cities are the reason for failed food security initiatives and what is required is a process of "re-ruralisation: stated more directly as

> Urbanisation is an inevitable trend seen across the world, and it could be lessened by providing adequate livelihood opportunities and public services for rural populations, and by collectively building a resilient agricultural sector in the face of climate change.
>
> (Meong, 2024).

The overarching national strategic planning strategy, the National Development Plan (NDP) breaks from earlier policy articulations in how food security should be approached. The NDP argues that region-based approaches to food security should be investigated (Battersby, et al, 2014). This comment is informed by the assertion/concern that "as South Africa's agriculture becomes more specialised and efficient, there may be a trend away from the production of staples to higher-value crops" (NDP 2012: 230). Trade and industrial departments, adopting mostly a pro-globalised open market approach, suggest that food security is achieved by greater equity in the global trade regime. The National Department of Health adopts, as would be understood, a more biomedical approach, calling for consumer education, programmatic responses to address the nutrition transition, and legislation to reduce the proliferation of obesogenic foods. These contradictions all trickle down to the implementing departments within the Western Cape Provincial structures.

On a policy level, despite claims of integrated policy approaches, the reality is that South African food security governance remains deeply embedded in a production-as-solution approach, which overlooks the fact that South Africa is over 65% urbanized. This rural- and production-oriented approach to food security not only misunderstands the challenge, but it also draws fiscal resources into redundant programmes.

It is within this contradictory and complex policy and operational intricacies that the Western Cape Government, the implementing and mandated local government body responsible for food and nutrition security, sought to engage. The food system is intricate and characterised by interaction and interdependence with other systems such as health, social security, resources, economic opportunity, spatial planning, the state of agriculture and the environment. The operation of this dynamic system determines the availability, access, utilisation and stability of the supply of food. Therefore, by taking a proactive food systems approach, the Western Cape Government (WCG) seeks to identify and promote sustainable household food security solutions and improve the nutrition of people living in the province. (WCG, 2016: 1). It is worth noting that given the different levels and fiscal accountability considerations, the Provincial Government and City Governments do not necessarily need to harmonise processes. However, in this case, a harmonisation was clearly evident given that from 2014, the Provincial Government co-funded the initial state of Cape Town Food System Report. A large component of those findings served to support later provincial policy and planning activities in respect of food and nutrition, as will be detailed below.

In the early part of the 2009 five-year governance cycle, various Provincial Strategic Objectives (PSOs) were formulated. One of these PSOs was Strategic Goal 3: Increase wellness, safety and tackle social ills. This required a variety of different departments to work together. Because of the complexity of governing a number of issues specifically relating to the extent of the food security challenge, a designated working group was convened, including different representatives or budget holders, to collectively address issues specific to wellness, education, social cohesion, sustainable communities, poverty reduction, and rural development. The group was referred to as the "Food and Society Working Group." Other groups were also convened to focus on other specific mandates. While group participants passionately presented their work, actions remained locked in silos. Despite the participants' best intentions, opportunities for integration and transversal systemic change were not realized (Haysom and Battersby, 2023). As a result, the Food and Society Working Group approached the strategic policy unit within the Department of the Premier, to seek ways to facilitate the development of a more strategic response to a number of key issues identified through the working group's deliberations. One of these issues was food and nutrition security. This formal request meant that the Department of the Premier had a formal mandate to initiate such work (Haysom and Battersby, 2023).

With this formal mandate, key policy staff within the Department of the Premier were able to start formulating an approach, one that they knew was beyond their specific skillset. At the same time, a parallel process was underway in the City of Cape Town, which had commissioned a report on the city's food system and food security (see: Battersby et al, 2013). These two processes aligned and while each process was different, what emerged at the provincial scale was the Nourish to Flourish Strategy (WCG, 2018) and the City of Cape Town Food Strategy (CCT, 2022).

The Nourish to Flourish Strategy has as its overarching goals, the objective of

> The Western Cape Food Security Strategic Framework (Nourish to Flourish - N2F) was transversal, evidence-based, and sought to contribute to a more coherent and targeted approach to addressing household food and nutrition insecurity in the Western Cape. N2F articulates appropriate outcomes and objectives linking programmes to the reduction of hunger, improvements in health, nutrition, and productivity, supporting the ability of all people to lead an active and productive lives in the Western Cape.
>
> The N2F Strategic Framework balances social and economic issues—supporting social protection and support for households as well as enabling opportunities to empower individuals and households within the food system. It identifies interlinked agendas which need to be targeted simultaneously to affect the food system. It highlights existing programmes within the food security realm and identifies ways to maximize positive outcomes through a coordinated approach, while simultaneously recognising gaps in current areas of focus of the WCG regarding food and nutrition and proposes responses. The N2F identifies the importance of improving the availability of appropriate data on key issues that assist in identifying and responding to key social, economic, and demographic trends to better serve communities currently at risk of food insecurity. Operationally, N2F proposes a "whole-of-society" approach that will seek strategic partnerships with other spheres of the State and sectors of society to improve responses to food insecurity.
>
> The Strategic Framework requires that governance mechanisms be identified to support the achievement of identified objectives by galvanizing action and creating working relationships amongst all stakeholders. It therefore aligns with a "whole-of-society" approach to improving food security and nutrition in the province, deliberately involving a diverse range of individuals, organizations and departments in identifying strategic priorities and opportunities. This work will be pursued through the creation of governance mechanisms that will address specific challenges in the food system.
>
> (WCG, 2016: 2)

The City of Cape Town Food Systems programme details its focus as follows:

> The Resilience Strategy identifies food insecurity as a priority stress that results from extreme inequality. It follows that many poor and vulnerable Capetonians struggle to put nutritious food on the table on a regular basis. Without the daily nutritional requirements for a healthy lifestyle, there is an increased risk to developing non-communicable diseases and obesity. Poor health has multiple implications not only for the individuals and households, but also for the economy and healthcare system.
>
> The Food Systems Programme addresses food security using a food systems approach. It encompasses the entire range of actors and their interlinked value-adding activities involved in the production, aggregation, processing, distribution, consumption and disposal of food products that originate from agriculture, forestry or fisheries, and parts of the broader economic, societal and natural environments in which they are embedded.
>
> It analyses Cape Town's food system and the opportunities in the short and medium term that the City of Cape Town can act upon to positively influence and improve food security for all Capetonians. These opportunities inform Action 1.4.1 of the Resilience Strategy, which is to: 'Strengthen the Cape Town Food System by focusing on improving access to affordable and nutritious food for Capetonians, particularly those living in vulnerable communities, using high quality data and focused interventions'.
>
> A wide range of food research, collaborative interactions between City departments and other food system stakeholders, and international best practice from multilateral city networks influenced the preparation of the Food Systems Programme. These informants are the basis for a range of practical interventions that the City could consider implementing within its mandate and in partnership with other stakeholders to strengthen the food system for Capetonians' benefit.
>
> (CCT: FSR, 2023: 2)

Both approaches effectively seek to leverage the mandates of other departments with their respective scales in order to respond to the urgent challenge that is food and nutrition security. This is a critical consideration in the Cape Town context. External reviewers of the Cape Town and Provincial food and nutrition strategies have commented on the lack of actionable interventions and programmes associated with these plans. There is a deliberate reason for this. These plans have been drafted by departments or units within both the City and Province who hold limited operational mandate. These departments are however essential in convening and integrating other departments to act and implement. These are the facilitators of delivery. The structure of the state is hamstrung by operational and fiscal silos. For this reason, implementation is generally to limited projects. These projects lack the ability to integrate across departments.

What both City and Provincial strategies have sought to achieve is to activate food and nutrition actions in processes that can ensure both policy and fiscal embedding. In the case of the City of Cape Town, this was effectively done with the inclusion of the Food Strategy in the Integrated Development Plan and in the Municipal Spatial Development Framework. The importance, and ground breaking nature of this inclusion cannot be overstated.

The next section offers detailed information on the state of food insecurity and the food and nutrition challenges faced by the urban poor in Cape Town. The data is drawn from different sources, different samples and data from different scales. This reflects a key challenge when engaging food and nutrition security in South Africa and in Cape Town. This challenge is compounded by different tools being used to collect data. As an example, some surveys make use of the Food Insecurity Experience Scale (FIES) tool, while others for example, make use of the Food and Nutrition Technical Assistance (FANTA) suite of survey tools. While both offer useful and generative results, results often differ in terms of what is reported. These differences make reporting a challenge. As will be noted below, national surveys are at times drawn on to offer a proxy for local results. These factors reflect the scalar and survey typology related challenges when attempting to report on food and nutrition security at the local scale. Interestingly, at the time of writing, the City of Cape Town is initiating a general household survey. Their reason for doing this is to support longer term strategic planning. This need is motivated by the challenge that National census data lacks the granularity needed to effectively inform strategic planning at the city scale, compounded by the 10 year intervals between census processes. Regrettably, despite this very real challenge, no food and nutrition related questions have been included in the household survey.

### 5.5.2. Current food and nutrition security responses

South Africa is considered to be a food secure country, as there is currently enough food to feed all residents; however, the unequal distribution of and access to this food means that there are many people in South Africa who live with severe levels of food insecurity (Battersby, Haysom, Kroll & Tawodzera, 2015; Frayne et al, 2010). Initiatives to address food security remain locked in a distinctly agricultural, production orientation, missing some of the key food access and utilisation challenges faced by those vulnerable to food insecurity in South Africa. These vulnerabilities have been highlighted by both activist groups such as the Pietermaritzburg Economic Justice and Dignity Organisation in their Household Food Affordability Index reports (PMBEJD, 2023), or by academics (Battersby et al, 2015, Frayne et al, 2010).

The uneven distribution of food insecurity is due to the systemic inequalities that persist within South Africa (Devereux et al, 2022). Cape Town, like many other cities in South Africa, remains socio-spatially and economically segregated. The city is the second largest city in South Africa and is home to just 7% of South Africa's population (Battersby, 2011). The city currently faces challenges of rapid growth, unemployment and rising poverty, a housing backlog of over 300 000 units, significant urban sprawl, as well as various environmental challenges such as droughts, and a rapidly escalating national energy crisis (Battersby, 2011). These factors, combined with the unsustainable and segregated spatial form of the city, have increased the rate of poverty, and subsequently urban food insecurity in Cape Town (Battersby, 2011).

In 2008, an AFSUN survey focussed on three low-income areas in the city, namely, Ocean View, Ward 34 in Philippi and Ward 59 in Khayelitsha (Battersby, 2011). These sites were purposefully selected. At the time the state of food insecurity in these areas was unknown. However, all three sites reflected certain general typologies that earlier evidence had indicated could be indicators of food insecurity. However, the research team were also interested in the possible community responses to food insecurity. For example, Ocean View had histories of being a fishing community so the links to small scale fisheries could have offered some respite. Ward 34 in Philippi was near the Philippi Horticultural Area.. However, the levels of food insecurity were far higher than anticipated and proximity to "food assets" did not seem to indicate sites that assisted in reducing food insecurity.

According to the Household Food Insecurity Access Scale (HFIAS), the Household Dietary Diversity Score (HDDS), and the Months of Adequate Household Food Provisioning (MAHFP) measures, 80 % of households in Cape Town were either moderately or severely food insecure (Battersby, 2011). In addition, the most commonly consumed food items were largely non-nutritive which suggests that the average diet may have caloric adequacy but not necessarily adequate vitamins and other micronutrients (Battersby, 2011).

The levels of urban food insecurity experienced in Cape Town, are closely linked to levels of household income (Battersby, 2011). This is particularly true of the urban poor, where it can be seen that those households earning within the lowest tercile are most severely food insecure (Battersby, 2011). Whereas households in the upper income terciles were significantly less food insecure (Battersby, 2011) (See Figure 33).

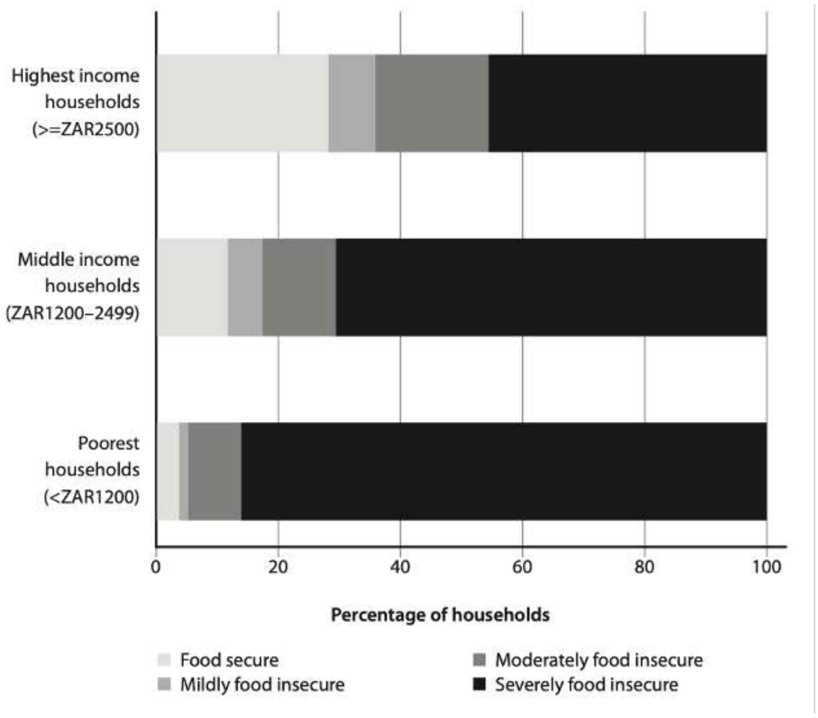



Figure 33: Cape Town Food Insecurity by Income (Source: AFSUN Study in Battersby, 2016: 18)

In South Africa, there is a well-developed social protection system, including social grants, cash transfers, free basic services, and, post Covid-19, a special relief grant. Before the Covid-19 pandemic, 46% of households were reliant on at least one form of social grant (Haysom, Crush & Caesar, 2017). This percentage of households increases every year and has only been exacerbated since Covid-19. Despite the availability of social protections, there remains a high level of food insecurity in Cape Town which brings into question the efficacy of these grants (Haysom, Crush & Caesar, 2017).

In terms of sources of food in Cape Town, the 2008 AFSUN study found that most low-income households in Cape Town access food through purchase (Battersby, 2011). The study found that 94% of households interviewed purchased their food from a supermarket, while 75% reported sourcing food from small shops, takeaways and restaurants (Battersby, 2011). However, the frequency with which these forms of retail were patronised varied across households with the majority of households only shopping at supermarkets once per month for bulk purchases of staple food items (Haysom, Crush & Ceaser, 2017). During the month, low income households relied on informal food traders which were patronised several times a week, reflecting a far greater patronage when compared to other income categories, confirming the significant role that the informal economy plays in enabling access to food for low income households (Battersby, 2011; Haysom, Crush & Ceaser, 2017). This food retail frequency offers critical insights into the nature and distribution of informal vendors. This reflects the food environment as being spatial and contextually specific. Figure 34 provides detail on the diversity of food access points, the relationships of different income categories with different food retail typologies.

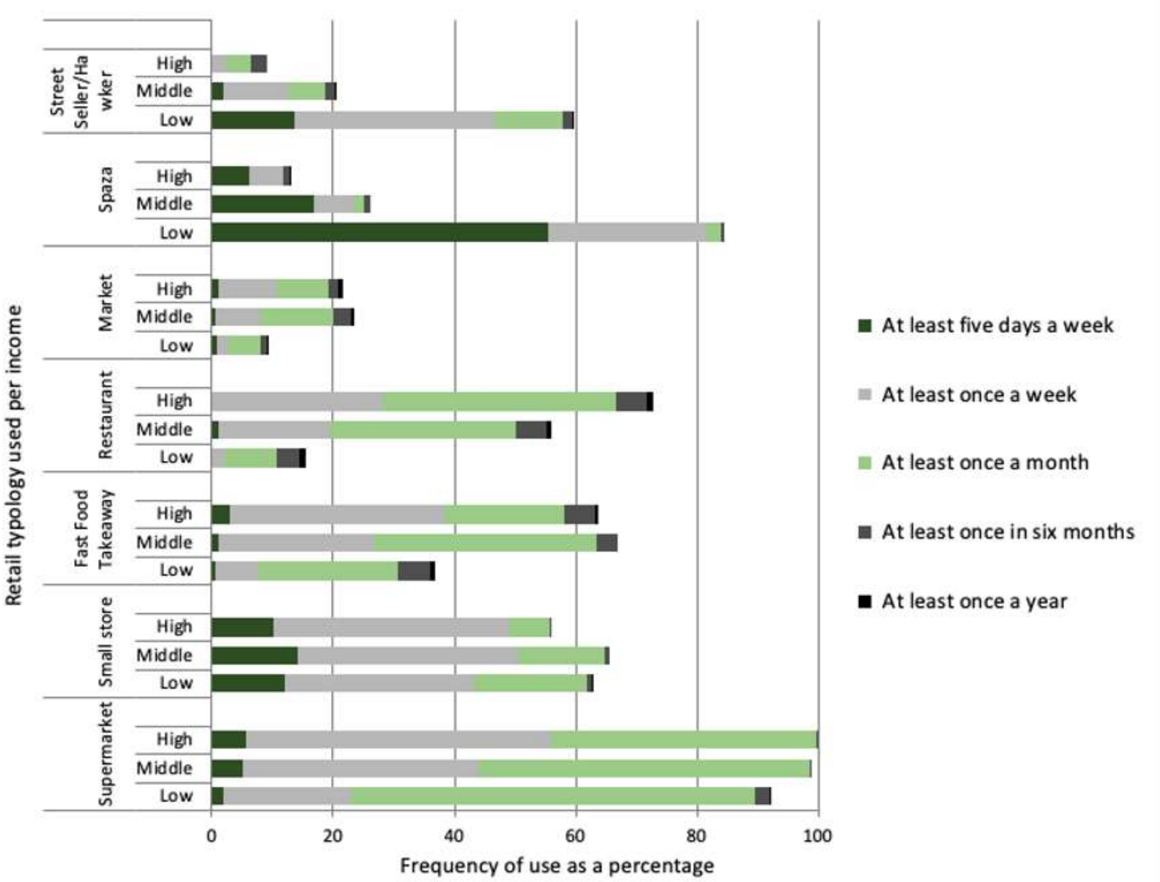



Figure 34: Food access frequency per income tercile (Source: AFSUN Cape Town Survey, Battersby 2016)

## 5.5.3. State of nutrition transition

The city's food environment is diverse with high end malls, and now, platform food retail operations, taking place alongside informal food vendors.

South Africa's demographic profile is predominantly urban, 63% of South Africans are already living in urban areas and the statistics will rise to 71% by 2030 (PMG, 2022),. As a result of our history, South Africa's food system was largely an urban food system before the country's demographic shift to being predominantly urban (Haysom, Battersby, Park Ross, 2018). It is therefore strange that one of the key public goods, food, is absent from almost all urban planning and wider urban governance practices and strategic thinking. The food system policy environment sees food security as the domain of the national Department of Agriculture, Rural Development and Land Reform and the provincial Departments of Agriculture. Nutrition questions are the responsibility of the National Department of Health, with provincial Health Departments being the implementers of nationally formulated policies. The South African Constitution mandates all spheres of government to ensure the progressive realisation of the rights contained within the Bill of Rights (RSA, 1996). However, South Africa's policy architecture works against these obligations. Food security is largely interpreted to be an issue resolved through increasing food production. The logic associated with this is that if production is increased, more food is in the market (availability) resulting in reduced prices (therefore increased access). This programmatic logic then results in the national Department of Agriculture delegating production-aligned responsibilities to provincial Departments of Agriculture who are responsible for implementation of a variety of food security programmes. This policy architecture has three key consequences. First, as detailed, responses remain production oriented, which skews a focus towards staple foods, focusing on grains, at the expense of a diversity of foods, resulting in a skewed food basket. The second issue is that the "food security equals production" orientation means that despite a political rhetoric of policy alignment, food security policies seldom align with nutrition policies (Kushitor et al, 2022). The third consequence is that cities and towns in South Africa resultantly have no food security policy mandate and as such, have no fiscal mandate to engage issues of food security. This absent mandate is however a red herring but remains locked in place thanks to the disproportionate view that food and nutrition security is addressed through production activities.

The result is one of inaction on the part of local government in these essential areas of responsibility (food and nutrition). This inaction is not through negligence or avoidance but as a result of a policy architecture that directs resources, both in terms of fiscal resourcing and skills, to areas beyond local government. For local governments, food becomes a so-called "unfunded mandate".

While this clearly needs to change, breaking down policy silos, political hierarchies and existing policy architecture is difficult, requires trade-offs and compromises. For a child in utero, whose pregnant mother lives in one of Cape Town's urban settlements, the nutrition received in the first 1000 days from their inception will determine their development trajectory for the rest of their life. The imperative is to act now, to see the urban food and nutrition crisis as exactly that, a crisis. One that requires immediate proactive responses. Urban managers cannot wait for budgetary shifts and a realignment of ministerial responsibilities. Alternative approaches to governing urban food systems are necessary.

Policies and operational interventions in Cape Town pay limited attention to the structural drivers of food poverty and poor nutrition, particularly diet related non communicable diseases. A food environments approach facilitates a far broader engagement in the nutrition transition taking place in Cape Town.

For the purpose of this work within the wider project, food environments were framed in slightly different ways, with two definitions being provided. These were: Food environments are the physical, economic, political, and socio-cultural contexts in which people interact with the food system to make decisions about acquiring, preparing, and consuming food (Swinburn et al, 2013; European Public Health Alliance, 2019), and Food environments are a combination of the 'spaces' in which people make food decisions and the foods and beverages that are made available, accessible, affordable, and desirable in those spaces (High Level Panel of Experts, 2017; European Public Health Alliance, 2019).

Both are clearly correct. Both speak to the relationship between food and the places from which food is accessed. However, is something further needed here? Swinburn et al (2013) frame this as "in which people interact with the food system to make decisions about acquiring, preparing, and consuming food" and the HLPE (2017) as "a combination of the 'spaces' in which people make food decisions". Both of these assume a specific agency on the part of the consumer. They both imply that the consumer is making a rational choice, a choice over which they have control. Here we apply these definitions, but also seek to go further. We are of the view that the consumer- retail point binary, with due respect for the wider political economy conditions articulated in both definitions, misses the key aspect of the wider food environment in African cities, particularly given the scales and extent of informality. This question is informed by similar questions asked in the literature. For example, Kroll et al (2019) state "in sub-Saharan Africa, urbanisation and food systems change contribute to rapid dietary transitions promoting obesity. It is unclear to what extent these changes are mediated by neighbourhood food environments or other factors." For this reason, we expand on these definitions to broaden the notion of a food environment. Our approach is informed by the emerging evidence that "consistent access to all social and physical infrastructure resources and services was a much stronger predictor of household food security than the income category of a household alone" (Frayne & McCordic, 2015: 10). This point effectively suggests that the food and nutrition outcomes, and the choices made are informed by more than the retail/customer choice dynamics and are determined by the interactions between the food system and urban system. This point asks if choice is being dictated by wider infrastructural and environmental deficits rather than the retail options influencing choice.

For this reason, review engages these wider environments from both a theoretical and policy perspective. Our engagement in this wider framing of the issues is also strategic. A critical challenge, one that is reinforced by the Sustainable Development Goals, hunger goal (SDG2) but also the framings within the

New Urban Agenda (NUA), is that urban governments have limited urban food systems and urban health mandates. These roles are often held by other tiers, or spheres, of government. Including wider urban mandate specific areas, such as infrastructure, economy, housing, offers an expanded opportunity to both engage city officials and support the wider relational aspirations of the AfriFOODLinks project.

This is made all the more challenging when considering the granularity of information and the data specific to the City of Cape Town. Not only is food security in the country measured in a simplistic, and arguably reductionist  manner, driven largely by a focus to report on the SDGs (So largely just FIES), the small sample sizes also place limitations on the use and wider applicability of data. National surveys offer insights and clues to some of the limitations, but other, often non state driven surveys offer perhaps greater granularity. However it is important to acknowledge the limitations of both externally funded surveys, and surveys whose generalisability can be subject to question.


Graffiti in Athlone, Cape Town
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

## Nutrition deficiencies

Across South Africa, both chronic poverty and chronic food insecurity are still endemic. This is largely, but not exclusively, a result of skewed income distribution patterns and structural inequalities (HSRC, 2000). As the BFAP figures of the cost of a basic nutrition diet illustrate, the structure of the food system is also a driver of food insecurity.  The proportion of those living below the $2.50 a day poverty line, for example, was estimated at 36.4% while 52.3% of the total population was living below the upper-bound poverty line of R577 per capita per month in 2009 (Statistics South Africa, 2012). Overall food sufficiency at the national level has therefore not necessarily translated to food security at household and individual levels.

Although significant improvements in food security were recorded nationally in the decade preceding the COVID-19 pandemic, the 2012 General Household Survey, shows that a significant proportion of the South African population still suffers from hunger and food security problems. The report shows that 12.6% of the households nationally are vulnerable to hunger (Statistics South Africa, 2013). In addition, 21.5% and 26.1% of the households also reported having limited access and more limited access to food respectively. This amounts to some 60% of all households experiencing some form of food insecurity. This dated report is used here as it feeds into the results from the first South African National Health and Nutrition Examination Survey (SANHANES-1) which affirmed the fact that food insecurity is a concern for many South Africans. According to the SANHANES findings, only 45.6% of the country's population were reported to be food secure. The other 28.3% were categorized as being at risk of hunger while 26.0% actually experienced hunger and were therefore food insecure (Shisana et al, 2013).

The challenges of food insecurity in the country are experienced in both the rural and the urban areas. While it has been assumed by policy makers that food insecurity is an issue that predominantly concerns rural households, the SANHANES-1 results show that this is not so. Although the largest proportion of respondents that were experiencing hunger were in the rural formal sector (37%), those in the urban informal sector were no better either, as 32.4% of the respondents in such localities had also experienced hunger (Shisana et al, 2013). In addition, the highest prevalence of being at risk of hunger was in the urban informal areas (36.1%) in comparison to rural informal areas (32.8%), further highlighting the fact that urban areas of South Africa are equally vulnerable and are plagued by food security problems especially in the less formal sectors of the cities. Thus, despite significant wealth concentrations in South African cities there also exist pockets of extreme poverty where households live on the margins, in conditions often worse than their rural counterparts. UN-Habitat has referred to this phenomenon as being 'two cities within one city' (UN-Habitat, 2006:1)

Levels of poverty and food insecurity are generally reported at the Provincial scale. This form of data aggregation tends to present the Western Cape as one of the most wealthy and food secure provinces, with the lowest proportions of the population experiencing food insecurity. For example, the Integrated Food Security argued states that "Gauteng and the Western Cape are wealthier provinces with the least number of poor households at less than 12% each." (DoA 2002, 22). These provinces may have the lowest proportions of categorised as poor, but this is simply a poor application of proportions. The population sizes of these provinces means that they do not necessarily have the "least number of poor households". Using data provided in the IFSS (based on data from 2000, but while dated, serves to highlight the challenge of data use and the use of proportions) on household expenditure as an indicator of poverty, 6.1% of Gauteng's 1 964 168 households spent R600 or less per month compared to 21.7% of the Northern Cape's 186 984 households.

Although the Gauteng proportion is far lower, this equates to 119 814 households, compared to 40 575 households in the Northern Cape. The use of proportions generates a particular understanding about the location of poverty and food insecurity in South Africa (Battersby 2012b).

While the proportion of households experiencing food problems was lower in provinces such as Gauteng and the Western Cape, the 2012 General Household Survey report also categorically makes it clear that these provinces are not immune to food insecurity. In the Western Cape, 21.3% of households (13.7% inadequate food access and 7.6% severely inadequate food access) reported having food access problems (Statistics South Africa, 2013: 42). Although the proportion of households experiencing food access problems in the Western Cape is low, the actual number of households with inadequate or severely inadequate food access problems in the province (842 814) is much higher than the 802 834 reported in Mpumalanga or the 284 333 reported in the Northern Cape Province. Hence, despite being one of the wealthier provinces in the country, the Western Cape nevertheless had close to a million households that were facing challenges in accessing food.

At the household level therefore, food insecurity is an issue of concern in the Western Cape Province. Given that the City of Cape Town contains 64.2% of the province's population (Western Cape Government, 2012), issues of food insecurity are key and deserve to be thoroughly interrogated. Moreover, although the city recorded the highest Human Development Index (HDI) of 0.74 in the province, against a provincial average of 0.71 in 2010, the number of malnourished children under five years recorded by the City of

Cape Town for the 2011/12 year (3.2 per thousand) was higher than the Western Cape Province's 3.0 per thousand for the same period (Western Cape Government, 2012:19), underlining the fact that the city is not immune to problems relating to food insecurity.

An earlier study on hunger prevalence also shows the existence of food insecurity among households in the province. The study reported that 58.3% of households in the Western Cape run out of money to buy food, that 27.1% of children aged one to nine years old experience hunger and that 9.4% of participants go to bed hungry (Labadarios et al., 2005).

According to the Statistics South Africa General Household Survey, Gauteng (25,3%) followed by KwaZulu-Natal (17,5%) and Western Cape (14,0%) are the provinces with the highest proportion of households that reported experiencing hunger in 2021. (StatsSA, 2021: 7). The same GHS (2021) report also examined the differences between what they termed metro and non-metro households. The results from this list Cape Town as having 0,1% higher prevalence of hunger compared to the next city, Gauteng, Cape Town reports `11,6% of households reported experiencing hunger.

According to the GHS, the Western Cape Reported just under 100,000 children who reported experiencing hunger. (98 899) and 14,5% of children in the province. (GHS, 2021)[12].

The Western Cape Government Stunting Baseline survey, carried out in 2023 found that:

> The double burden of malnutrition, stunting and overweight/obesity, remains a concern in the province. The prevalence of stunting in the WCSBS (17.5%) was close to the upper cut-off of the medium public-health-concern category of 10–19% for 0–59-month-old children. Stunting in the very vulnerable <2-year-old age group was 19.7%, pushing it into the high public-health- concern category for this age group. The prevalence of underweight (5.6%) was just above the lower cut-off of the medium (5–9%) and wasting (3.4%) in the low (2.5–<5%) public-health-concern categories for 0–59-month-old children. The prevalence of overweight (15.1%) fell in the very high public-health- concern category of ≥15%. Stunting-overweight was not common at 2.4%.
> (WCG, 2023)[13]

As a comparison across other areas in South Africa, Figure 35 offers a sense of the scale of the issue in Cape Town, but further offers insights into other cities and non-metro areas.

[12] Statistics South Africa (StatsSA) (2021). Assessing food inadequacy and hunger in South Africa in 2021 using the General Household Survey (GHS). Report no. 03-00-20. Statistics South Africa, Pretoria.

[13] Senekal, M., Steyn, N. & Nel, H. et al. (2023). Western Cape Stunting Baseline Survey on under-5-year-old children, Western Cape Government.

| | Number of households with people that experienced hunger | Percentage (%) |
|---|---|---|
| South Africa | 2 078 496 | 11,6 |
| **Metros** | | |
| City of Cape Town | 240 970 | 11,6 |
| City of Johannesburg | 238 610 | 11,5 |
| Ekurhuleni | 93 241 | 4,5 |
| City of Tshwane | 77 033 | 3,7 |
| Mangaung | 48 500 | 2,3 |
| Buffalo City | 32 771 | 1,6 |
| eThekwini | 29 393 | 1,4 |
| Nelson Mandela Bay | 19 820 | 1,0 |
| KwaZulu-Natal non-metro | 333 470 | 16,0 |
| North West non-metro | 224 596 | 10,8 |
| Mpumalanga non-metro | 220 [illegible]07 | 10,6 |
| Eastern Cape non-metro | 133 542 | 6,4 |
| Gauteng non-metro | 116 929 | 5,6 |
| Northern Cape non-metro | 77 342 | 3,7 |
| Free State non-metro | 77 221 | 3,7 |
| Western Cape non-metro | 49 386 | 2,4 |
| Limpopo non-metro | 65 564 | 3,2 |

Figure 35: Households experiencing hunger by Metro and Non-metro areas
(Source: GHS, 2021: 8)

More recent work drawing on the Global Nutrition Report of 2022 offers a sense of the current challenges in South Africa in regards to nutrition. Details of nutrition outcomes at the provincial scale are less available but it is worth noting that while the Western Cape Province, and Cape Town reflect a slightly higher economic profile, the inequalities and stubborn poverty evident in the city means that the National figure also hold true for the region.

According to the Global Nutrition Report Country profile:

> South Africa is 'on course' to meet two targets for maternal, infant and young child nutrition (MIYCN). No progress has been made towards achieving the target of reducing anaemia among women of reproductive age, with 30.5% of women aged 15 to 49 years now affected. Meanwhile, there has also been no progress towards achieving the low birth weight target, with 14.2% of infants having a low weight at birth. There is insufficient data to assess the progress that South Africa has made towards achieving the exclusive breastfeeding target; however, the latest prevalence data shows that 31.6% of infants aged 0 to 5 months are exclusively breastfed. South Africa has made no progress towards achieving the target for stunting, with 21.4% of children under 5 years of age affected, which is lower than the average for the Africa region (30.7%). South Africa is 'on course' for the target for wasting, with 3.4% of children under 5 years of age affected, which is lower than the average for the Africa region (6.0%). The prevalence of overweight children under 5 years of age is 11.6% and South Africa is 'on course' to prevent the figure from increasing.
>
> South Africa has shown limited progress towards achieving the diet-related non-communicable disease (NCD) targets. 42.9% of adult (aged 18 years and over) women and 18.2% of adult men are living with obesity. South Africa's obesity prevalence is higher than the regional average of 20.8%

for women and 9.2% for men. At the same time, diabetes is estimated to affect 14.3% of adult women and 11.3% of adult men.

(GNR, 2022)

Drilling down to the Western Cape specifically, work carried out by the Nourish to Flourish working group within the Department of the Premier of the Western Cape lit the following food system related development challenges:

In terms of underweight children, poor children in the Western Cape are five times higher than upper middle-income countries (11.9% vs 2.3%). In terms of stunting, poor children are three times higher than upper middle-income countries (22.9% vs 6.9%). It is not just the lack of food that presents a challenge. Poor children in the Western Cape. More than one in five children between the ages of 2 and 14 are overweight or obese (26% of females and 22% of males) and for adults the female obesity rate is three times the global rate (15%) (Gorgens, 2023).

These figures have diverse implications, impacting health, family life, wellness and others. From a purely economic perspective,

***The Western Cape stands to lose R357 billion in household spending from stunting and up to R590 billion from obesity to 2040. This accounts for over 5% of GDP.***

(Gorgens, 2023: 8- emphasis added)[14]

From a stunting perspective, a recent report (the Western Cape Stunting Baseline Survey (WCSBS) ) found that a double burden of malnutrition, stunting and overweight/obesity, remains a concern in the province. The prevalence of stunting in the WCSBS (17.5%) was close to the upper cut-off of the medium public health concern category of 10–19% for 0–59-month-old children. Stunting in the very vulnerable <2-year-old age group was 19.7%, pushing it into the high public-health- concern category for this age group. The prevalence of underweight (5.6%) was just above the lower cut- off of the medium (5–9%) and wasting (3.4%) in the low (2.5–<5%) public-health-concern categories for 0–59-month-old children. The prevalence of overweight (15.1%) fell in the very high public-health- concern category of ≥15%. Stunting-overweight was not common at 2.4% (Senekal et al, 2023).

The prevalence of both stunting and overweight/obesity in the same households is a symptom of the failed food system in South Africa, a system where generations of exclusion and poor diets has created a food environment in which children are born underweight, and are found to be stunted early in their growth journey, but where their mothers and others in the household are under nourished, yet overweight. This is one of the key urban food security challenges (Labadarios, 2005; Christian & Dake, 2022).

For a more granular view of the state of food security a review of the data collected by the African Food Security Urban Network (AFSUN) offers insight into the disproportionate state of food insecurity encountered by the majority of poor living in Cape Town. The AFSUN study focused exclusively on three poor areas in Cape Town.

### 5.5.4. Food insecurity in Cape Town

[14] Gorgens, T. (2024). Nourish to flourish mobilisation strategy: Improving nutrition in children under five in the Western Cape, Presentation to Provincial Executive Council, 24 February 2024, Provincial Legislature.

According to the results from the AFSUN survey, despite a view that food security is higher in rural areas, the AFSUN survey found that the severity of food insecurity in poor areas of Cape Town was greater than that in the rural area sampled. In Klipplaat, 69% of households were severely food insecure, but this proportion was as high as 80% in Ward 95 in the Cape Town survey (Battersby, 2011). A further manifestation of food insecurity is limited dietary diversity. The median household dietary diversity score for the sampled Cape Town households was six out of 12. This apparently diverse diet masks the fact that three of the food types most commonly consumed are largely non-nutritive: fats, sugar or honey and 'other' ('other' was usually tea and coffee) (Battersby, 2011). Limited dietary diversity is generally viewed as being linked to limited household finances. As noted earlier, food insecurity indicators included in large-scale general surveys (such as those conducted by StatsSA) tend to relate to the proportion of income spent on food. These household-scale factors are important, but this paper argues that extra-household factors, such as the location and type of markets available, are an equally important indicator. Just under half the surveyed population said they either had to eat foods they really did not want to eat (48%) or had to forego foods they preferred (48.6%) because of limited resources. Well over half (63%) said they ate a limited variety of foods due to a lack of resources. In the Cape Town survey, households spent an average of 30.1% of declared income on food, rising to 53.2% in the poorest tercile of households. These figures are very similar to those reported by May and Rogerson from a series of earlier surveys in poor areas of various South African cities (1995:169).

A more recent survey conducted across Cape Town, which sought to test the population's wider levels of food insecurity, noted that nearly 40% of households have HFIAS scores higher than the mean, and nearly one-third had scores of 10 or more. The Household Food Insecurity Access Prevalence (HFIAP) indicator categorizes 46% of households as food secure, while 36% are severely food insecure. The remaining 18% experience some degree of food insecurity (See Figure: 36) (Crush et al, 2018).

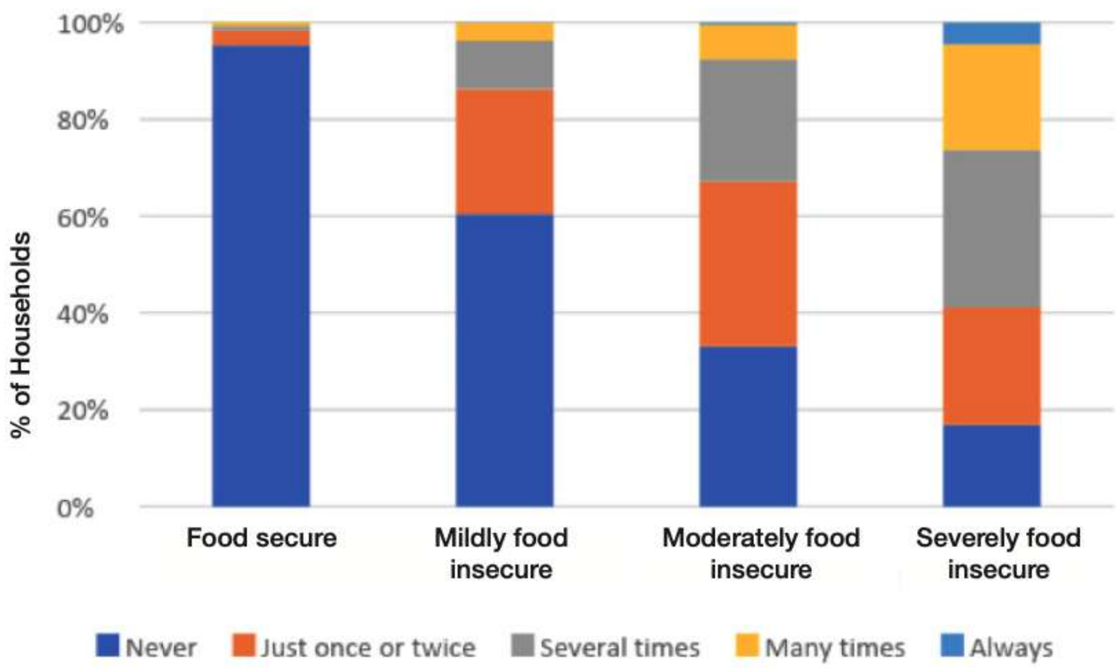
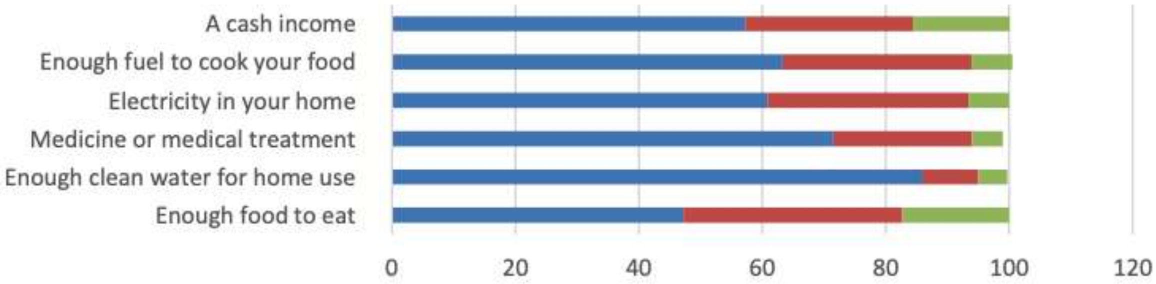



Figure 36: Levels of food insecurity as a percentage of households (Source: Crush et al, 2018: 30)

As food security increases so does the frequency with which shortages are experienced. Among food secure households, 95% never experience food shortages, compared with only 5% of severely food insecure households. In addition, 22% of these households experienced food shortages "many times" and 17% say this is a continuous experience (See Figure 37) (Crush et al, 2018).




| | Enough food to eat | Enough clean water for home use | Medicine or medical treatment | Electricity in your home | Enough fuel to cook your food | A cash income |
|---|---|---|---|---|---|---|
| Never without | 47.2 | 85.9 | 71.5 | 60.8 | 63.3 | 57.2 |
| Once or twice/several times without | 35.5 | 9.1 | 22.5 | 32.6 | 30.6 | 27.2 |
| Many times/always without | 17.3 | 4.7 | 5 | 6.6 | 6.6 | 15.7 |

Figure 37: Lived Poverty Index responses to the question "In the past month have you or your household gone without ...) (Source: Crush et al, 2018: 23)

The mean household dietary diversity score across the entire City sample was slightly higher, HDDS 6.75 out of a possible 12, than the earlier AFSUN study, but here a total of 43% of households scores of 6 or less (generally considered a proxy for poor nutritional outcomes), one-third have scores of 5 or less and 20% have scores of 4 or less (Crush et al, 2018). Because the 12 food groups contain at least two non-nutritive foodstuffs (sugar and tea/coffee) and most poor households purchase these foods, households with an HDDS of 5 may be consuming only three nutritionally-adequate foods (Crush et al, 2018).

The Months of Adequate Household Food Provisioning (MAHFP) indicator found that only 50% of households had adequate food over the previous year. The main periods of shortage are January to April with a smaller spike in July during the winter (Crush et al, 2018).

Female Centred Households made up one-third of the total. These households are most likely to be food insecure with the highest average HFIAS (7.8), the lowest HDDS (6.3) and the lowest MAHFP (9.1).Additionally it was found that as household income declines so levels of food insecurity increase. According to the HCP study, it was found that the HFIAS ranged from 12.6 for households in the lowest quintile to less than 1 for those in the upper quintile (Crush et al, 2018). As many as 70% of households in the lowest quintile were severely food insecure, a figure that declines steadily in succeeding quintiles to 52%, 40%, 18% and 5%. The HDDS figures also consistently decline from 8 for those in the upper-income quintile to 5.1 for those in the lowest-income quintile (Crush et al, 2018). The MAHFP declines similarly from 12 to 7 (Crush et al, 2018).

Given the high rates of formal unemployment in Cape Town, it was found that households that receive income from formal wage employment were consistently more food secure than those that do not. For example, their respective HFIAS scores are 3.8 and 8.6, with HDDS scores of 7.3 and 6.1 (Crush et al, 2018). Households with a low Lived Poverty Index (LPI) score of 1 or less have an HFIAS of 4.1 (compared to 14.9 for those with an LPI of more than 3)(Crush et al, 2018). The equivalent figures for other indices are 7.1 and 5.2 (HDDS) and 10.4 and 7.5 (MAHFP) (Crush et al, 2018).

## 5.5.5. Vulnerable groups

Vulnerability to food and nutrition insecurity is something that extends well beyond just the profile of a specific group and an assessment of that groups access to food. In a study that included the Cape Town AFSUN survey data, vulnerability was found to be driven by far more than just the traditional food access questions. In the AFSUN 11 City study, data is drawn from a survey of 6453 households from 11 Southern African cities emphasised the central role that urban planning and development play in reducing food insecurity in poor urban neighbourhoods. Per this study, "consistent access to all social and physical infrastructure resources and services was a much stronger predictor of household food security than the income category of a household alone" (Frayne and McCordic, 2015: 10). This means that vulnerability cannot just be determined by considering income, despite its importance, in understanding vulnerability.

Links between vulnerability and gender are evident in Cape Town. IN the AFSUN survey it was found that across the poor neighbourhoods surveyed, the highest proportion of vulnerability was reflected in female centred households (See Figure 38). While the variances may be deemed small, this does make a significant difference.

| | | Food secure % | Food insecure % | Total % |
|---|---|---|---|---|
| Cape Town | Female centered | 18 | 83 | 100 |
| | Male centered | 24 | 76 | 100 |
| | Nuclear | 18 | 82 | 100 |
| | Extended | 30 | 70 | 100 |
| | Total | 20 | 80 | 100 |

Figure 38: Vulnerability per household head typology (Source: Battersby-Lennard et al, 2009)

Household form is a further indicator of vulnerability. This is however somewhat more complex. AFSUN and related HCP surveys have found that households living in informal areas are far more likely to be food insecure. The complexity of this is that this is not the case for all informal households. This lack of absolute confirmation is linked to the earlier work by Frayne and McCordic (2015) where that nature and form of infrastructure also serve to drive down food insecurity. While infrastructure costs when residing in areas that are highly informal are disproportionately high. Some also choose to live in informal areas because the costs of maintaining infrastructure can be reduced. This discussion will be engaged in more detail later in this report.

Another area of vulnerability is migrants. It is estimated that 10% of households in Cape Town are migrants (with all household members born outside the city) and nearly a third (29%) are mixed households (with a combination of migrants and city-born members). The question here is whether there is a general negative relationship between migration and household food security in Cape Town, as suggested in Crush, 2017). Of the three types of household, it is migrant households that actually have the lowest levels of food insecurity as measured by the HFIAS (at 5.2). However, this mean score is very similar to that of non-migrant households (at 5.3). Migrant households also have slightly better MAHFP scores (10.2 versus 9.9) than non-migrant households. However, their dietary diversity scores are lower (6.6 versus 6.9) (Crush et al, 2018).

The most consistent finding is that mixed households (with a combination of migrants and non-migrants) are the most food insecure on all three measures. This observation is further confirmed by the HFIAP indicator, which found that 45% of mixed households are severely food insecure, compared with 33% of non-migrant and 31% of migrant households. Similarly, only 31% of mixed households are completely food secure, compared with 52% of non-migrant households and 47% of migrant households (Crush et al, 2018). The reasons why mixed households are on average more food insecure than migrant and non-migrant households are not immediately apparent and require further investigation. One possibility is that migrant households consist primarily of adults who have migrated to the city for work and do not contain child dependents. Many mixed households would have more mouths to feed as, by definition, they include dependents born in the city after the adults moved there (Crush et al, 2018).

In South Africa, social grants are the key policy (and economic) tool used for addressing South Africa's deep economic inequalities. Social protection is a right contained within the Bill of Rights (Section 27 (1c)) (Section 27 also contains the Right to Food and the Right to Health). A number of social protection or social security processes are evident. South Africans who fall below a certain income threshold are eligible to access subsidized housing. Children in poor households are able to access free basic education. More generally, social protection interventions remain an essential part of a wider package of food and nutrition support programmes. These pro- grammes are offered by various government ministries at different levels; from the Department of Agriculture assisting smallholders and urban producers, to school feeding programmes run through the Department of Basic Education, to pre- and post-natal support managed by the Department of Health. In addition to these services the Nation Ministry of Social Development's social grant system provides assistance to the poor (Crush et al, 2018) (See Figure 39).

Social grants in South Africa cover vulnerable children (Child Support Grant, Foster Care Grant), the elderly (Grants for Older Persons), the physically and those requiring specialized care (Care Dependency Grant, Grant-in-Aid), as well as temporary relief (Social Relief of Distress). Other than the Foster Care Grant and the Grant-in-Aid, social grants are means tested, a process requiring the assessment of the value of assets and income. Eligibility for a grant is contingent on income falling below a certain threshold. The extent of the social grant system is evident when considering South Africa's total population of 55.9 million. The number of social grant recipients has increased over the past 20 years from an estimated 4 million in 1994 to 16.9 million by September 2015. The child support grant, with 11.9 million recipients, has the highest number of recipients. The next two grants with high numbers of recipients are the old-age pension (3.1 million) and the disability grant (1.1 million) (Crush et al, 2018).

COVID-19 amplified vulnerabilities. For vulnerable groups, often those in receipt of the below social grants, vulnerability was amplified. Low-income women bore the brunt of the pandemic in their roles as mothers, providers and homemakers. The pandemic highlighted the inadequacies of the social protection paradigm that underlies the design of cash transfers such as the Child Support Grant (CSG), which has a narrowed focus on chronic poverty and vulnerability (Zembe-Mkabile, Ramokolo & Doherty, 2023).

Vulnerability and diversified coping strategies go hand in hand. One such key coping strategy is that of reciprocity networks. One of the factors that made it particularly difficult for many caregivers and households to cope during the lockdown was that caregivers' usual networks and sources of help and support were inaccessible. This was especially the case during Levels 5 and 4, when the economy was in shutdown mode. Caregivers reported that even loan sharks were not lending out money to community members during Level 5 of the lockdown and they were unable to borrow money and food through normal networks such as friends, neighbours and relatives, because people were either not working, or were scared to lend out money in case it was not refunded (Zembe-Mkabile, et al, 2023). The extent of vulnerability and precarity, are captured in the following conclusion for the COVID-19 vulnerability study led by Zembe-Mkabile (2023)

> The CSG, already inadequate to meet the needs of recipients before the pandemic, was unable to mitigate the full impact of COVID-19 on children's diets, hunger and food security. It was only the introduction of the Caregiver's Allowance, and the once-off top-up of the CSG, which eased the burden for many primary caregivers and their children, but the termination of this grant within five months of its introduction, left these mothers and their children stranded, their reciprocity networks shattered, resulting in deepened vulnerability.

(Zembe-Mkabile, et al, 2023" 227).

| Type of grant | No. of recipients | Monthly payments | Qualifications | Recipient of grant |
|---|---|---|---|---|
| Grant for Older Persons (pensions) | 3.1 million | Older than 60: ZAR1,500 Older than 75: ZAR1,520 | Annual earning less than ZAR64,680 or combined income of R129,360 | Individual |
| Disability Grant | 1.1 million | ZAR1,500 | People unable to work; 18-59 years of age, submit a medical assessment or report no older than three months and no other social grant | Individual |
| War Veteran's Grant | 277 | ZAR1,520 | People who are disabled or older than 60 and served in the Second World War or Korean War | Individual |
| Foster Care Grant | 533,000 | ZAR890 | | Foster parent |
| Care Depend-ency Grant | 129,000 | ZAR1,500 | To the main caregiver of child with a permanent, severe disability; medical assessment report; annual income less than ZAR169,200 (single) or ZAR338,400 (combined income if married) | Caregiver |
| Child Support Grant | 11.9 million | ZAR350, to main car-egiver of child 18 years or younger | Annual income ZAR39,600 (single) or ZAR79,200 (combined if married) | Parent/s |
| Grant-in-Aid | 126,600 | ZAR320 for those receiv-ing another grant | Taking care of someone who requires full-time care because of physical or intellectual disability | House-hold |

Figure 39: Social grant figures and payments (Source: Ferreira (2016)

Vulnerability and coping strategies are generally aligned. One of the key strategies applied by those facing vulnerability is to prioritise the purchase of certain foods over others. These foods are referred to by the Pietermaritzburg Economic Justice and Dignity group (PMEJD) as core foods (PMBEJD, 2024: 3).

> When the prices of core foods increase, there is less money to secure other important mostly nutritionally-rich foods, which are essential for health and well-being and strong immune systems (viz. meat, eggs and dairy which are critical for protein, iron and calcium; vegetables and fruit which are critical for vitamins, minerals and fibre; and Maas, peanut butter and pilchards, good fats, protein and calcium essential for children. The data shows that the core foods contribute 53% of the total cost of the Household Food Basket. At an average cost of R2 810,24 in February 2024, these foods are relatively very expensive in relation to the total money available in the household purse to secure food. These foods must be bought regardless of price escalations. The high cost of core staple foods result in a lot of proper nutritious food being removed off the family plates. The consequences of high costs on the core foods has a negative impact on overall household health and well- being, and child development.
>
> (PMBEJD, 2024: 3)

It is incorrect to assume that only the most poor are vulnerable. In their ongoing work across different town sizes and typologies across South Africa, PMBEJD collect data on the household food basket, and then compare these data with wage related salaries, across different variables, infrastructure related costs, such as transport, energy bills, and mobile data costs, as well as other related factors. Figure 40 provides a sense of the food system vulnerability, detailing the relationship between the cost of food and the remaining cash left in a household and the budgetary/nutrition balancing act that households need to engage. Figure 40 engages three wage related scenarios with a comparison between those that work either 21 days or 15 days. For those that work for 15 days per month, the calculations differ further where different hours spent working are captured at either eight hours worked per day in the 15 days worked or 5 hours. Figure UHB nuances the notion of vulnerability and the relationship between this and food. For those in precarious or even just limited income, the likelihood of eating well is limited.

| **Income** | **Wage scenario 1** | **Wage scenario 2** | **Wage scenario 3** |
|---|---|---|---|
| Number of days worked | 21 | 15 | 15 |
| Number of hours worked | 8 | 8 | 5 |
| Remuneration rate | R25,42 | R25,42 | R25,42 |
| Wage income | **R4 270,56** | **R3 050,40** | **R1 906,50** |

| | **Wage scenario 1** | | **Wage scenario 2** | | **Wage scenario 3** | |
|---|---|---|---|---|---|---|
| **Wage income** | **R4 270,56** | | **R3 050,40** | | **R1 906,50** | |
| **Household expenses** | | **% of wage** | | **% of wage** | | **% of wage** |
| Transport to work (2 taxi, return) | R1 680,00 | 39,3% | R1 200,00 | 39,3% | R1 200,00 | 62,9% |
| Prepaid electricity (350kWh) | R906,92 | 21,2% | R906,92 | 29,7% | R906,92 | 47,6% |
| Total for transport + electricity | **R2 586,92** | **60,6%** | **R2 106,92** | **69,1%** | **R2 106,92** | **110,5%** |
| *Money remaining to secure all other expenses* | **R1 683,64** | | **R943,48** | | **-R200,42** | |
| Subtract: food (4 persons) | R3 680,83 | | R3 680,83 | | R3 680,83 | |
| ***Minimum** surplus/shortfall on food costs* | **-R1 997,19** | **-54,3%** | **-R2 737,35** | **-74,4%** | **-R3 881,25** | **-105,4%** |

Figure 40: Income and household cost scenario calculations (Source PMBEJD, 2024: 8)

Addressing the inequities in South African society remains a stubborn and challenging issue. The high Gini Coefficient remains a significant challenge (CCT, 2022). These inequities are clearly evident in the food system, but pervade all of society. There are many programmes and initiative designed to address inequities, ranging from active affirmative action strategies across industry to attempts at Broad Based Black Economic Empowerment (Mpehle, 2011), a national programme designed to balance the inequitable economic distribution across the country, a legacy of apartheid exclusion. However, as some have pointed out, the focus on equality and ensuring equal access to is misguided as it fails to effectively counter the biases evident in society. Such approaches effectively drive a normalisation of poverty where ,despite the programmes, the poor remain poor. Rather than seeking an equal society, what is required, is to ensure greater equity, where disproportional focus is given to those traditionally excluded (Devereux et al, 2022).

A key site where those most vulnerable to food security can seek respite is to ensure that their children attend school where school meals are provided. School meals are an essential coping strategy applied by vulnerable households, without which, the levels of food insecurity and poor nutrition would be far greater.

## National School Feeding Scheme

The Primary School Nutrition Programme (PSNP) was introduced in 1994 under the Reconstruction and Development Plan (RDP) (Deveraux et al, 2018). In 2004, the NSNP was transferred from the Department of Health to the Department of Basic Education (DBE) and subsequently renamed the National School Nutrition Programme (NSNP) in 2006. Under this new department and title, the programme expanded to include secondary schools and all schools classified in the three poorest quintiles. To date, the NSNP serves over 20 000 quintile 1-3 schools, providing meals to more than 9 million learners in primary and secondary schools nationwide (Department of Basic Education web, 2021).

According to the DBE, the school meal consists of a variety of proteins (soya, fish, eggs, milk, sour milk, beans, lentils) , fresh fruit, vegetables and carbohydrates or starches.

The NSNP aims to "enhance learning capacity and improve access to education by providing a nutritious meal daily to learners at school" (DBE infographic, 2016). This aim is rooted in three key pillars of the programme:

1. **School Feeding:** providing nutritious meals to all learners in quintile 1–3 primary and secondary schools, as well as identified special schools, on all school days.

2. **Nutrition Education and Deworming:** educating learners and the community at large about good nutrition and creating awareness about the Deworming Campaign.

3. **Sustainable Food Production (SFP):** facilitating food gardens and other food production projects in schools.

(Devereaux et al, 2018)

Each of these pillars is supports  the objectives of the NSNP to:

- contribute to enhanced learning through school feeding;
- strengthen nutrition education in schools in order to promote healthy lifestyle
- promote sustainable food production initiatives in schools;
- develop partnerships to enhance the programme.

(DBE, Report on the Implementation Evaluation of the NSNP, 2016)

## Provincial Feeding Schemes

When the NSNP was implemented in 1994, the Western Cape, unlike other provinces, already had existing feeding schemes in place. The Peninsula School Feeding Association (PSFA)  is one example of these existing feeding programmes. The PSFA's motto is "You can't teach a hungry child", which  drives the organisation's objectives to reduce short term hunger,  enhance children's ability to learn, and to increase school attendance.

The PSFA has been active in the Western Cape since 1950, and  targets schools in the Cape Flats in Cape Town, as opposed to the income quintile approach that the NSNP uses.  The PSFA is currently a service provider which delivers the NSNP in the Western Cape Metro through a contract with the  DBE which is tendered every 2 years. Many of the schools that the PSFA targets are quintile 4 and 5 schools, which would not usually be served by the NSNP.  In recent years, the PSFA has started targeting Early Childhood Development (ECD) centres, specifically unregistered ECD centres that would not usually receive support from the Department of Social Services. The goal of this initiative is to address child stunting, by targeting children aged  6- 24 months.

## 5.6. Culture of the City and relationship with the food system

Cape Malay dishes
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

As a popular tourist destination, Cape Town's food culture is often seen as a unique selling point of the city. Images of wine farms, curated fresh produce markets, and various colourful plates of food, are often what come to mind when thinking of Cape Town's food culture. While this may be the experience of many international tourists and a few Capetonians who can afford this lifestyle, the reality for many Capetonians is not the same.

The segregated spatial legacy of Cape Town has influenced the ways in which food is thought of in the city. Cape Town has a diverse culinary heritage which includes influences from the City's colonial heritage, as well as from Cape Malay residents who are descendants from the Southeast Asian slaves who were brought to the Cape Colony by the Dutch in the 17th century. Further African migrants, from both South Africa and the broader African Continent, to the city have further integrated their food systems into the fabric of the Cape Town "food culture".

"You have to taste a culture to understand it," travel writer Deborah Cater once said. South Africa is a country with a rich cultural heritage and food plays a big role in all cultures. Home to many cultures, with different cuisines and dishes.

However, for this review the representation of food and specifically food as culture in public for a, web pages and narratives on blogs and social media about Cape Town's food can best be described as curated. This curation silences a number of foods, particularly foods of a more African origin. This represents a distinct cultural silencing, a perpetuation of the segregation and associated dismissal of culture and traditions. When African food is represented, it is largely confined to street foods or braai food. Within this report, searchers were conducted in both academic and popular media in an attempt to document the food cultures of Cape Town. The results are depicted in the section that follows where some of the better known foods are explained in further detail. However, this reflects only a small segment of the foods consumed. Importantly, the foods depicted below fall into the same trap of occluding and disregarding, even silencing the rich diversity of African foods that make up the Cape Town food culture.

Baderoon (2002) commenting on an interview about Muslim art in South Africa, the historian Shamil Jeppie made the observation that "our premier art is food". Whether this reflection holds merit, it does pose an important question about food and culture. If art is reflected in food and art is food, what does this mean for if an entire segment of the Cape Town population, the largely Black African population, has their food, and by implication, art, sanitised and curated in the way that current Cape Town Tourism and the related travel media depict this? This provides a critical lens through with to engage questions of race, exclusion and marginalisation. Food offers a unique lens, as always, to gain insights into both what is seen, but also, what is not seen.

This question confirms Van Graan's (2007) earlier point that questioning "whose tastes, smells, feelings, sights and sounds will come to prevail in defining the character and experiences of the city?" Clearly from the depiction of the current tastes and smells, it is not African food culture, or for that matter African culture.

This presents a significant opportunity for the AfriFOODlinks project. The project will actively seek to engage in one of its case study projects to engage the diverse food cultures of the City of Cape Town, documenting the different foods, food cultures and cultures associated with different groups of the diverse Cape Town population.

The need to document and challenge the existing biased accounts of food culture in Cape Town was made clear to the authors over 15 years ago. In a community dialogue that focused on seed saving attended by urban and peri urban food growers, nurseries and seed savers, participants were asked to bring a lunch to share with three other participants at the workshop.[15] These participants were then asked, as part of the workshop process to explain why they selected this food, what it meant to them, and why they deemed this food special.

[15] Participants were compensated for this meal. Ethics approval for this meeting was received through Stellenbosch University in 2008.

Some of the dishes included; *umphokoqo*, a crumbly maize meal with sour milk or butter milk, others were *Umqa*, a stiff maize meal porridge with curried cabbage, *umxhaxha* a combination of pumpkin and corn, and *umkhuphu* maize meal and beans. Others brought home baked breads, such as *umbhako*, made in baking pots. Most interesting was the diversity of recipes for foods that are generally assumed to be prepared in only one way. There were at least ten different forms of samp and beans or *umnqushu*, provided, with much debate as to which was the most traditional and which was the most reflective of foods consumed at "home", with reference to where the person who brought the food grew up. Some brought street foods, such as *amagwinya*, a fried dumpling or fried bread, with a variety of fillings. Participants did tease those bringing street foods, asking if they had prepared these foods themselves, to much protestation and clarification of specific recipes, fillings and flavourings, such as *chakalaka*, a spicy tomato and bean relish. Many of the key recipes brought were served with side dishes, mostly leafy greens. These included spinach, and wild greens, or *imfino*, *morogo*, *muroho*, and specific greens such as amaranthus, or *utyutu*.

Importantly in the sharing of this food, the conversations were imbued with memory, accounts of mothers of grandmothers teaching the participants how to prepare these foods. Further, every street seemed to reflect a slight variation in the recipe, defending their version as the "gold standard" of cultural representation. This aligned with Nyamnjoh's (2018) account of migrant's foodways and cultures in Cape Town and how eating a traditional dish at a restaurant catering to their national identity, eaters were reminded of their mother's love and ritualistic preparation processes, reminding them of home, adding to the longing to return and affirming their cultural identity and sense of self, despite removal from "home".

Capturing and documenting the diversity of foods in Cape Town, will form part of the case study work as this research continues. Further, the learning that many foods are not fully represented in the current State of Knowledge process, not only affirmed the importance of this work, but did show what still needs to be done.

With this in mind and with due respect to the foods not fully detailed in this report, the following section represents a documentation of the foods often associated with Cape Town and [parts of] its food culture.

## Cape Malay Cuisine

Cape Malay cuisine is said to have started in 1652 when the Dutch arrived in the Cape to establish a port for their vessels to stop at on their way to the East Indies. The Dutch needed labourers for the growing port and began bringing in slaves from Indonesia, as well as parts of Africa. These slaves were the first to bring Islam to the Cape and included political dissidents opposed to the Dutch presence in Southeast Asia.

Cape Malay has emerged as a strong culture of its own, distinct from the Asian, African, and Dutch cultures that have influenced it. Food is an incredibly important part of Cape Malay culture. There are many foods that make up Cape Malay cuisine, including *bredies* (stews), curries, pickles (atchars and sambals), savoury snacks and sweet treats such as *boeber*, *koesisters* and a variety of "*porrings*" (the Cape Malay take on warm puddings). Cape Malay celebrations such as Eid, weddings, engagements, births are feasts of sharing where enough food is made to fill all the bellies present and then still share a "*barakat*" with guests to take home. The barakat is a plate made up of cakes and snacks that couldn't be consumed at the event and is given as a thank you to guests for attending.

## Koesisters

The Cape Malay *koesister* is flavoured with cinnamon, cardamom, mixed spice and aniseed. Every koesister-maker has their own combination of spices so no two people's *koesisters* are alike. After deep-frying they're cooled down, dipped in a hot sugar syrup, and then rolled in coconut. World Koesister Day is marked on the first Sunday in September.

*Koesisters* and coffee can be found on many breakfast tables on Sunday mornings in Cape Town. "I remember many a Sunday morning, getting up early to go and buy koesisters in Schotcheskloof, Bo-Kaap. There I was, along with so many other boys and girls, walking with our empty bowls that would soon be filled with the most deliciously warm and fragrant koesisters," wrote Cariema Isaacs in Cooking For My Father in My Cape Malay Kitchen.

## Hertzoggies

The *hertzoggie* is a traditional biscuit filled with jam and coconut. It is named after JBM Hertzog, who was a South African Prime Minister from 1924-1939. According to food writer and historian Cass Abrahams, Hertzog had made two promises: To give women the vote and to make Malays equal to whites. Excited at the prospect of equality, Malays baked a shortcrust pastry filled with apple jelly and topped with egg white and coconut and called it a Hertzoggie in Hertzog's honour.  However, when he only fulfilled one promise (giving women the vote), the Malays took this same Hertzoggie, topped it with pink and brown icing and named it a *twee gevreetjie* (hypocrite).

## Bredies

A *bredie* is a stew consisting of meat and vegetables. What sets a Cape Malay bredie apart from other stews is the way the meat is braised along with the addition of either a chilli or chilli flakes, according to Cariema Isaacs. It is slow-cooked and the flavours develop together as they're cooking.  The most popular bredies are tomato bredie, cauliflower bredie, and even bean bredie. It's commonly served with pickled vegetables or atchars.

## Seven Colours

Seven Colours is a term used to describe a Sunday meal in many black South African homes and it's the meal you look forward to after a long Sunday church service, according to Nolu Dube-Cele, owner of Seven Colours Eatery.

She tells us that a Sunday feast commonly consists of yellow rice, meat and chicken, colourful salads and all the different kinds of vegetables, especially beetroot. A Seven Colours meal is soul food that's shared and made with love, explains Dube-Cele. Seven Colours inspires celebration menus so it's not surprising to find it on the table at birthdays, weddings and anniversaries.

"When I started my business, I got inspired by this mealtime. I wanted to create something that represents an authentic South African food culture and would bring different people together. My interpretation of this mealtime has everything to do with the traditional food that I grew up eating. I bring interesting twists and variations to traditional dishes. For example, making turmeric *umngqusho* instead of rice, incorporating traditional vegetables like *utyutu* (amaranth). When you look at the Seven Colour plate, it has different elements but somehow, they come together," says Dube-Cele.

## Bunny Chow

Indian food is a popular food in South Africa. However, Indian food in South Africa differs from what you'd find across the vast sub-continent of India. Durban-style Indian cooking is unique, and you won't find it elsewhere in the world. Durban-style Indian cuisine grew in South Africa because of the indentured labourers who came from India to work here on sugar plantations, railways and farms. They didn't have a lot of spices so they had to improvise with what they could find in SA. There are many dishes that make up South African Indian cuisine, such as crab curry, tamarind fish curry and *salomies* – a curry-filled roti wrap sold by many take-outs, but the one dish that has global recognition has to be the Bunny Chow.

The Bunny Chow is a hollowed-out loaf of bread filled with curry and has been around since the 1940s or '50s. There are many different stories about its origins. The dish is believed to have come from a popular Indian restaurant. During apartheid, restaurants weren't allowed to serve indentured labourers inside the premises so they would serve them out back. The bread was hollowed out to serve as a vessel to hold the curry. This was wrapped in newspaper and shared among the labourers.

The name derives from the Banias – an Indian caste which started restaurants in Durban. True connoisseurs of the Bunny Chow don't call it by its full name though. Durbanites would simply request a Bunny or order a quarter/half a mutton/veg/chicken and the eatery would immediately understand what they want.

## Gatsby

A *gatsby* is a long sandwich filled with a number of ingredients, usually including several kinds of meat and hot chips. The Masala Steak Gatsby is a favourite: lettuce topped with spicy tender, juicy steak and chips, doused with sauces. One Gatsby can feed at least four hungry people, so it's made for sharing. Rashaad Pandy, owner of Super Fisheries in Athlone, says he invented the sandwich by accident one night in 1976. This iconic sandwich may have started out in Athlone, but it's found at many fast food restaurants in Cape Town. While the Gatsby is made for sharing, there are rules to its consumption which Gatsby consumers take very seriously. For example, "any chip falling from any given piece of the Gatsby is considered fair game."

Gatsby, a famous dish -since 1976
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

## Braai or Shisanyama

Braai, a much loved South African pass time, translated to barbeque, but has its own set of social norms. Braais usually happen during summer, though it's not uncommon to drive through a suburb on a warm winter's day and smell the unmistakable meat on the coals wafting through the air. *Shisanyama* is similar to a braai or barbeque, but has its roots in South Africa's townships. *Shisanyama* is a Zulu word, literally meaning "burn meat", which refers to the way the meat is cooked over hot coals. It started off as a way for butchers to drive sales over the weekends, and today it's one of South Africa's most delicious and social ways of eating.

While many different forms of braai exist, and many contestations can be heard as to how best to braai, it is perhaps useful to differentiate between a *Shisanyama* and other forms of braai (meaning cooking on ana open flame, usually fuelled by wood or charcoal) type foods. *Shisanyama* is generally steak or other cuts of meat and might include kebabs (or *sosaties*) braised over the fire. However, other foods are also cooked over fires and these include *smileys*, sheep's heads that are generally boiled, then braaied. Other foods include *walkie talkies*, chicken feet, also braaied over an open flame.


Women braai different types of meats in an informal settlement in Cape Town. Here the walkie talkies (chicken feet) are evident, seen being turned by the braaier on the right. Sausage and other forms of affordable meats are also prepared.
(Source: Samantha Reinders for Consuming Urban Poverty) – not for re-use

## 5.7. Food and nutrition system challenges in the City

The food and nutrition challenge in Cape Town is complex and reflects both historical legacies and contemporary policy and economic challenges. The state of the challenge was effectively captured in a citywide food and nutrition report published in 2018. While it is acknowledged that issues such as COVID-19 would have exacerbated issues, the 2018 report sought a city wide understanding of the challenges. Given the levels of inequity detailed, understanding sites of vulnerability and how these are reflected are captured in the use of the Food and Nutrition Technical Assistance (FANTA) measures used in this report. The challenges range from a clear depiction of the highly inequitable food system that exists, to constrained dietary diversity within the poorer communities, where many fall below the proxy indicator of six, indicating significant nutritional challenges. Further the months of adequate household food provisioning captured further vulnerabilities, capturing the casualised nature of the service economy in Cape Town and the poor state of employment. These findings are detailed in Box 1.

- Cape Town households spend a significant amount every month on food and groceries (an average that is more than the total old age pension grant in 2016). However, the proportion of household income spent on food consistently declines from 66% for those in the lowest-income quintile to only 8% for those in the upper-income quintile.
- Of the various basic necessities captured by the Lived Poverty Index, the highest levels of deprivation pertain to food with only 47% of households never experiencing not having enough to eat.
- The mean Household Food Insecurity Access Score (HFIAS) was 5.9. However, nearly 40% of households have HFIAS scores higher than the mean, and nearly one-third had scores of 10 or more. The Household Food Insecurity Access Prevalence (HFIAP) indicator categorizes 46% of house-holds as food secure, while 36% are severely food insecure. The remaining 18% experience some degree of food insecurity.
- As food insecurity increases, so does the frequency with which shortages are experienced. Among food secure households, 95% never experience food shortages, compared with only 5% of severely food insecure households. In addition, 22% of these households have experienced food shortages "many times" and 17% say this is a continuous experience.
- The mean Household Dietary Diversity Score (HDDS) is 6.75 out of a possible 12. A total of 43% of households have scores of 6 or less (generally considered a proxy for poor nutritional outcomes), one-third have scores of 5 or less and 20% have scores of 4 or less. Because the 12 food groups contain at least two non-nutritive foodstuffs (sugar and tea/coffee) and most poor households purchase these foods, households with an HDDS of 5 may be consuming only three nutritionally-adequate foods.
- The Months of Adequate Household Food Provisioning (MAHFP) indicator found that only 50% of households had adequate food over the previous year. The main periods of January to April with a smaller spike in July during the winter.
- Female Centred households (with a female head and no male partner shortage are up one-third of the total. These households are most likely to be food insecure with the highest average HFIAS (7.8), the lowest HDDS (6.3) and the lowest MAHFP (9.1).
- As household income declines, levels of food insecurity increase. For example, the HFIAS ranges from 12.6 for households in the lowest quintile to less than 1 for those in the upper quintile. As many as 70% of households in the lowest quintile are severely food insecure, a figure that declines steadily in succeeding quintiles to 52%, 40%, 18% and 5%. The HDDS figures also consistently decline from 8 for those in the upper-income quintile to 5.1 for those in the lowest-income quintile. The MAHFP declines similarly from 12 to 7.
- Given the high rates of formal unemployment in Cape Town, a related finding is that households that receive income from formal wage employment are consistently more food secure than those that do not. For example, their respective HFIAS scores are 3.8 and 8.6, with HDDS scores of 7.3 and 6.1.
- There is a close relationship between food insecurity and lived poverty. Households with a low Lived Poverty Index (LPI) score of 1 or less have an HFIAS of 4.1 (compared to 14.9 for those with an LPI of more than 3). The equivalent figures for other indices are 7.1 and 5.2 (HDDS) and 10.4 and 7.5 (MAHFP).
- As expected, there is a relationship between food security of the household and the occupation of the household head, with households with a head in full-time wage employment significantly more food secure than house- holds in which the head is unemployed or self-employed.

- The two most common threats to household food security in the six months prior to the survey are both linked to jobs and income: loss or reduction of employment of the household head (experienced by 14% of households) and reduced income of a household member (13%).

Box 1: State of food and nutrition security in Cape Town (Source, Crush et al, 2018: 1-3)

Within the contest of these challenges, the policy landscape is confounded by the earlier mentioned policy hierarchy which sees multiple food and nutrition responses being confined to national or provincial scales for implementation and policy response. This leaves cities, and specifically Cape Town, as one of the largest cities in South Africa, with significant inequality, vulnerable to high levels of food security, without the requisite policy tools to effectively respond.

Emerging work on food seeking to map out alternative responses to food and nutrition challenges at the urban scale is constantly pointing to the role of other systems that need to align to enable adequate access to food and nutrition (Frayne & McCordic, 2015; Moragues-Faus, et al, 2022; Haysom, 2021). These reports and positions all point to the intersection of different systems and policy domains that require a food and nutrition lens or policy prescription, if food and nutrition security is to be addressed. In a review focusing on South African policies, across the scales of national, provincial and city specific scales of policy and governance, Figure 41 reflects the absent policy space in respect of policies and plans as these impact the food system, the health system, the urban system, the social system and the social services systems. The gaps is striking and highlights the significant challenge faced by urban actors seeking to respond to and address the food systems challenge at an urban scale.

Figure 41 reflects a further challenge, one of integration. Given the nature of the state, across all spheres of government, policy actions dictate fiscal allocations to enable policy governance. Given the significant absence of fiscal resources and the significant fiscal allocations that need to be directed to social services and welfare, budget allocations are sites of significant contestation within government. Budget allocations are fiercely defended. The performance management system in government means that government officials are often unable to effectively deliver on their delivery mandates, and aligned performance indicators, and any absence of funding further amplifies delivery shortfalls and potential redundancies. As such, the absence of a policy mandate means that budgets are closely managed and anything outside a formal budget is deemed unnecessary expenditure. For food and nutrition security programming, this presents a significant challenge.

As a result of such policy, and resultant fiscal, constraints, government is unable to engage the systemic challenges of food and nutrition security (See Figure 41). For the city of Cape Town, this presents a policy challenge. This has been countered by very effectively and "smart" policy engagements where policy has been seen as secondary to other issues facing the city.

The City of Cape Town has sought to integrate food and nutrition policy into a wider risk management approach, where the food strategy has been embedded within the Resilience Strategy. This is smart and effective policy making as it moves the food strategy away from the simplistic policy and associated fiscal allocation squabbles and locates this centrally within a key risk approach, one where the focus is shifted from narrow silos to interconnected mutual benefit and risk mitigation. As a result of this, the integrated nature of the food and nutrition challenge is seems as a strategic focus rather than a hinderance. This focus has now seen food and nutrition issues actively included in key city level strategic documents, specifically the Integrated Development Plan and the Municipal Spatial Development Framework. These processes are discussed later in greater detail. However, how these processes integrate with the current policy oversight and absent urban policy engagement remains a key challenge that needs to be addressed if food and nutrition security is to be effectively engaged and addressed at the urban scale (see Figure 41). However, Cape Town has little power to change this policy hubris, with significant restructuring of policy and fiscal allocations needed. This is particularly urgent given that almost 70% of South African live in urban areas.

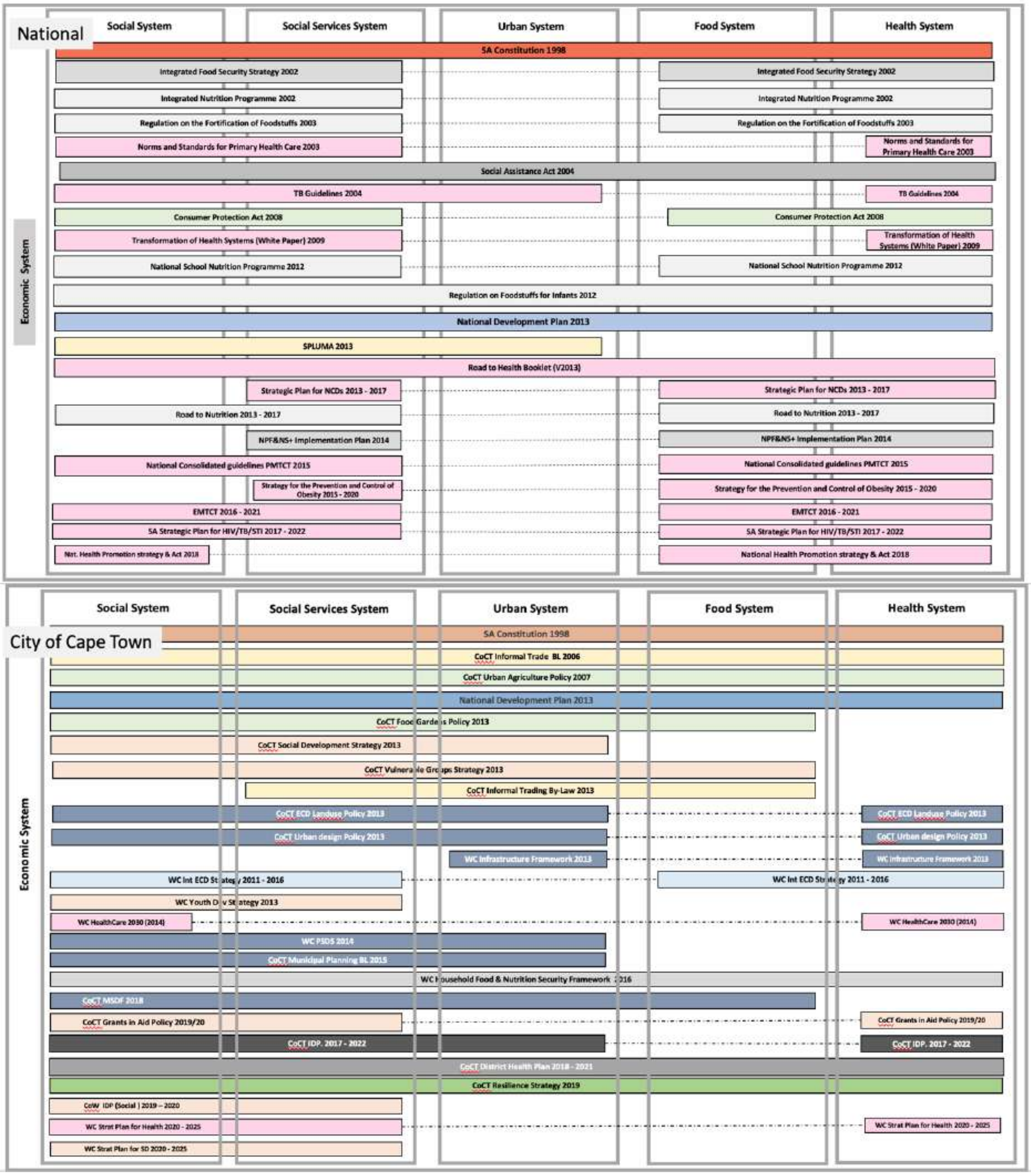



Figure 41 : Depiction of South African policy and programme coverage as these pertain to food and nutrition outcomes across Five Key systems: Food System, Urban System, Health System, Social System and Social Services Systems.
(Source: Credit to the Nourished Child documents from articles in press)

# 6. AfriFOODlinks City food system baseline information

## 6.1. Food systems stakeholders

For the purposes of this study, stakeholders were understood to be any actor or organization influencing or influenced by the City of Cape Town's food system. Although the application of the municipal boundaries achieves a clear geographical demarcation, the food system and its influences are not bound by this spatial scale. Some of the key stakeholders are therefore based beyond the City's boundaries. Broad stakeholder categories were identified: government at all levels, the private sector (formal and informal), civil society organizations and research (Battersby et al, 2014).

The identification of stakeholders was facilitated through mobilizing existing networks, followed snowball sampling. The main networks were ACC (UCT), Stellenbosch Food Security Initiative (FSI) and Southern African Food Lab (SAFL) (Battersby et al, 2014).. The database was then checked for gaps and biases. A particular challenge was the representation of the informal stakeholders, such as hawkers, street vendors and traders. This proved to be a fundamental challenge in that they are clearly important stakeholders (both affecting and being affected by food supply into the City), yet, they largely lack formal, i.e. registered, structures and collective organisations (Battersby et al, 2014).. The informal sector is also highly dispersed and dynamic, with high start-up and failure rates and often run on individual and 'survivalist' modes (Battersby et al, 2014). This made it difficult to identify specific individual stakeholders (or organisations) rather than merely listing them as a general category of 'informal traders'. Through additional research, including internet searches and document analysis, we identified a number of more or less formal collective organisations which represent at least some segments of this highly varied and multi-facetted stakeholder group. The database included in the Appendix is intended to be understood as a flexible resource that can be added to as the City's food system engagement develops. The database at the time listed 133 organizations and institutions categorized according to type of stakeholder, locality and position in (or around) the food chain (Battersby et al, 2014).

### Stakeholder clusters

Categorisation 1: Stakeholder groups

Businesses (formal and Informal)

- Retailers
- Wholesalers and markets
- Food manufacturers and processors
- Hotels, restaurants and caterers
- Financial service providers
- Consulting companies
- Trading companies
- Logistic companies and cold chain services
- Agro-chemical businesses and plant protection services

Non-governmental organisations

- Member-based service organisations
- Cross-sector partnerships
- Religious and faith-based organisations

Government

- Local and municipal government

- Provincial government
- National government
- Universities

Research
- Universities
- Research institutes and other organisations

Categorisation 2: Locality
- Wards
- Municipal
- Provincial
- National
- International

Categorisation 3: Position in (or around) the food chain

In the chain: economic actors
- Input providers
- Producers
- Processors and manufacturers
- Transport companies and logistical service providers
- Wholesalers
- Retailers
- Food service providers (including restaurants, home deliveries, etc.)
- Consumers
- Waste, recycling and disposal service providers

Around the chain: influencers & supporters
- Policy-makers
- NGOs and community organisations (including school feeding schemes, Food Bank, etc.)
- Financial service providers Researchers
- Media
- International actors (e.g. international NGOs and advocacy groups, research organisations)

(Battersby et al, 2014).

The database provided an overview of the stakeholders that are in different ways engaged in the food system of Cape Town (Battersby et al, 2014). Secondly, it offers a point of departure to categorise the various stakeholders. Whilst we commenced with the three types of categorisations mentioned above, many more options would be possible and could provide value, depending on the objective of the exercise (Battersby et al, 2014). For instance, another way of categorising stakeholders would be to look at their activities in the food system. Group 1 could encompass all those actors who are involved in selling and buying food; Group 2 could include all those actors who provide services to Group 1; and Group 3 could comprise those actors who influence Group 1 and Group 2 through regulation, lobbying or advocacy. Finally, the stakeholder review of Cape Town captured a large number of researchers focusing on issues of food security, food supply, production, and consumption. This reveals the considerable technical expertise in universities and other research institutions in the City region which can assist the City in their future engagement with issues of food system governance and food security (Battersby et al, 2014).

While the listing and categorising of stakeholders provides the City with a useful database, it does not assist the City in developing strategies to work with the stakeholders and understand where synergies and disconnects might lie. For this reason a workshop was convened to bring together representatives from the different stakeholder groups to better understand how roles and responsibilities in the food system were understood (Battersby et al, 2014). The approach taken was a Net Mapping approach (Aberman et al 2010) in which the network of key individuals and organizations engaged in the food system were identified, along with the interactions between them. In this approach, the dimensions of exchange, voice, power and authority were emphasized, as well as identifying the mandates of stakeholders. This approach was deemed to be important as it addressed the questions of how the food system actually operates and why. Key questions were therefore: What actors are involved in the food system? How are they linked? What kind of influence do they have? (Battersby et al, 2014).

Importantly not all stakeholders need to work with the city. It is acknowledged that for many food system actors, such as informal vendors, the City is in fact a potential hinderance, seeking to impose policy and by-law prescripts on their abilities to trade.

However, for this work and specifically the AfriFOODlinks project, while we recognise the independence of these groups, and their associated desire not to engage unless through specific modes of engagement, it was deemed necessary to seek out a more pluralistic approach to urban food and nutrition governance, a process through which the city is seen as an active layer in the urban food governance space. This is a logic applied in this report.

## 6.2. Policy and regulatory environment

Different processes and actions roughly described as "policy actions" have different intentions. Some serve as long term planning strategies, curating the political and developmental landscape over a designated period of time. These are generally national development plans, cyclical documents that are broad and frame intentions, but generally say very little about how these will be implemented and operationalised. Policy documents that address the absent directives in strategic visions are generally targeted at a very specific component of political action or developmental management. These documents set out the points of contact and action on the roadmaps that are envisioned in strategic long-term documents.

National policies and strategies often set the broad "rules of the game", but policies and strategies are not exclusive to the national or state scale. At every sphere of government there exist broad framing documents, linked to clear "division of power mandates", generally supported by the more bureaucratic implementation-type interventions.

Importantly both rely on a similar mix of politics and evidence. How the interaction between specific politics and evidence intersect is beyond the scope of this report, but it needs to be borne in mind, specifically because no document is neutral and purely evidence oriented. Equally so, no document is purely political, despite some perhaps appearing as such.

However, the mix between actionable policy, or even the very local scale by-law, and strategic visioning and long-term strategic planning informs the structure of this report. Given that any local policy action responds to and is generally informed by both the legal (for example the Constitution of South Africa), strategic plans (for example the National Development Plan) and policy frameworks (for example the Spatial Planning and Land Use Management Act, 2013). This report starts at the national scale, documenting the key so-called strategic documents. In South African the Constitution of South Africa (Act 108 of 1996) provides the broad legal framework for all laws, policies and operational activities of the state. If the Constitution provides the legal framework, the National Development Plan (of 2013) provides the ideological vision and resultant operational imperatives that then curate the national developmental response. These two document front-end this report with other interventions, strategies and development processes flowing from these, cascading down to local policies and "interventions" aimed at addressing, or playing a direct role in, issues pertaining to food environment, and more broadly, food and nutrition outcomes in urban South Africa, and more specifically, Cape Town.

National scale strategies have a direct bearing on the way in which local actions are actioned. Given the place-based focus of the AfriFOODlinks project, linked to food environment related outcomes, policies or plans, termed  interventions span the intersection between urban, health, spatial, social and food (per Figure 41).

To provide further clarity on the responsibilities across different spheres of government and for ease of reference in the reading of this document, Table 2 provides a graphic representation of the different powers and authorities of the different spheres of national government, but also details the different sectoral clusters in terms of ministerial delegation. This is primarily operational as opposed to legally designated through the South African Constitutional separation of powers, as defined in Schedules 4 and 5 of the South African Constitution. This operational framing is aligned to the constitutional mandates but has been included to provide clarity on how the different ministries, and operational authority is structured. Also provided is a clarification on the process for a specific intervention to be "written into law" in South Africa.

## Passage of a Bill and processes before being signed "into law"

This is a distinct detail on the South African policy journey. It is deemed necessary to understand this process as some of the key outcomes from the AfriFOODlinks project include policy briefs. Equally, given the scale of engagement with city or local government actors, understanding both the nature of the policy landscape, as well as the processes through which policies and programmes become a reality are key to not just the engagements with city government, but also, engagements within the wider governance work package. The first stage of realisation of this idea comes in the form of a discussion document called a Green Paper.  This is drafted in the relevant government department, or in the Ministry.  This Green Paper contains the general mode of thought that inspired the proposed policy.  Once this document is published, it is open to comments, ideas, and suggestions (there are no green paper interventions listed in this review but clarification is provided as certain interventions may be under review of some sort).

After this process, the document takes on a more official form – as a White Paper.  White Papers contain broad statements of government policies. A draft law is referred to as a Bill.

There are four main types of Bills that come before Parliament:

1. ordinary Bills that do not affect the provinces (section 75 of the Constitution);
2. ordinary Bills that affect the provinces (section 76 of the Constitution);
3. Money Bills (section 77 of the Constitution); and
4. Bills amending the Constitution (section 74 of the Constitution).

Different actors can initiate bills. There are slightly different processes for the passage of a bill depending on who initiates a bill. A Bill can be initiated and written by a number of bodies:

- By a Minister or an MEC: Most national and provincial Bills are drawn up by a Minister at national level or an MEC at provincial level.
- By an MP or an MPL: Bills drawn up by individual Members are called Private Members Bills. A Committee concerned with Members' legislature proposals in each House decides whether the Bill meets certain criteria (which could include financial implications) and can be introduced into the House.
- By a Committee: Parliament has recently drafted rules and procedures enabling a Committee to initiate a Bill - Section 73 (2) of the Constitution and National Assembly 268 provide that Committees may introduce legislation in the Assembly with the permission of the House

The act of laying a Bill before Parliament is the first step towards having the Bill passed in Parliament.  This duty of laying a Bill before Parliament falls to a Minister, Deputy Minister, Member of Parliament or committee.

Before becoming a law, a Bill must be passed by both houses of Parliament, the National Assembly (NA) and the National Council of Provinces (NCOP).  The initial step will see the introduction of the Bill in the National Assembly.  Following this introduction, the Bill is referred to the relevant committee, where it may be subject to amendments.  Thereafter, the Bill may be submitted to the public via public hearings. Next, the

Bill goes to the relevant House, where it is debated. If this House passes the Bill, it is submitted to the other House. Finally, the Bill is sent on to the president for assent where, once it has been signed, it is an Act of Parliament.

It is perhaps interesting to note that even within the Constitution, despite the Constitution being signed into law, certain passages are not yet law. This refers specifically to the Bill of Rights. This provides a clue that while contained within the Constitution, the points listed within the "Bill" or Rights require a further legal process before these can become "law". This could happen in a number of ways. Either, per the processes detailed above, a specific bill linked to a Section within the Bill of Rights can be initiated. A further option is that a legal entity can challenge specific action of any body of the state and take this action to court. Once the court passes a ruling on this, linked directly to the Bill of Rights, this then sets the legal precedent, making a specific process linked to a specific Section in the Bill of Rights judiciable. The most publicised example of this process relates to Housing (Section 26) and the Grootboom case.

Bills tabled in the Provincial Legislature Schedule 5 of the Constitution of South Africa lists the areas over which the provinces have exclusive legislative control. By-laws passed by City Governments also relate to the powers delegates to local governments through Schedule 4 of the Constitution and these need to be subject to approval by the municipal council and due public participation and comment.

<table>
<tr><th colspan="5">National Government Scale</th></tr>
<tr><td colspan="5">Legislative authority</td></tr>
<tr><td colspan="5">Parliament (national)</td></tr>
<tr><td colspan="5">National Assembly (350 – 400 members)<br>National Council of Provinces (90 delegates)</td></tr>
<tr><td colspan="5">Executive authority</td></tr>
<tr><td colspan="5">Cabinet (national)</td></tr>
<tr><td colspan="5">President<br>Deputy President<br>Ministers</td></tr>
<tr><td colspan="5">Ministerial Clusters</td></tr>
<tr><td>Economic Sectors, Investment, Employment & Infrastructure Development</td><td>Governance, State Capacity and Institutional Development</td><td>Social Protection, Community and Human Development</td><td>International Cooperation, Trade and Security</td><td>Justice, Crime Prevention and Security</td></tr>
</table>

<table>
<tr><td>Mineral Resources and Energy<br>Tourism<br>Agriculture, Land Reform and Rural Development<br>Communications<br>Cooperative Governance and Traditional Affairs<br>Environment, Forestry and Fisheries<br>Employment and Labour<br>Finance<br>Higher Education, Science and Technology<br>Human Settlements, Water and Sanitation<br>International Relations and Cooperation<br>Police<br>Public Enterprises<br>Public Works and Infrastructure<br>Small Business Development<br>State Security<br>The Presidency<br>Trade and Industry<br>Transport<br>Women, Youth and Persons with Disabilities (in The Presidency)</td><td>Cooperative Governance and Traditional Affairs<br>Public Service and Administration<br>Finance<br>Home Affairs<br>Justice and Correctional Services<br>The Presidency<br>Public Enterprises<br>Women, Youth and Persons with Disabilities (in The Presidency)</td><td>Health<br>Basic Education<br>Agriculture, Land Reform and Rural Development<br>Cooperative Governance and Traditional Affairs<br>Environment, Forestry and Fisheries<br>Employment and Labour<br>Higher Education, Science and Technology<br>Human Settlements, Water and Sanitation<br>Justice and Correctional Services<br>Public Works and Infrastructure<br>Small Business Development<br>Social Development<br>Sports, Arts and Culture<br>The Presidency<br>Transport<br>Women, Youth and Persons with Disabilities (in The Presidency)</td><td>Sports, Arts and Culture<br>Environment, Forestry and Fisheries<br>Communications<br>Defence and Military Veterans<br>Finance<br>International Relations and Cooperation<br>Justice and Correctional Services<br>Mineral Resources and Energy<br>State Security<br>The Presidency<br>Tourism<br>Trade and Industry</td><td>Defence and Military Veterans<br>Police<br>Finance<br>Home Affairs<br>International Relations and Cooperation<br>Justice and Correctional Services<br>Social Development<br>State Security<br>Small Business Development<br>The Presidency<br>Women, Youth and Persons with Disabilities (in The Presidency)</td></tr>
<tr><td colspan="5">Judicial authority</td></tr>
<tr><td colspan="5">Constitutional Court<br>Supreme Court of Appeal<br>High courts<br>Magistrates' courts</td></tr>
<tr><td colspan="5">Provincial Government</td></tr>
<tr><td colspan="5">Executive authority</td></tr>
<tr><td colspan="5">Provincial executive councils</td></tr>
<tr><td colspan="5">Premier<br>Members of the Executive Council (MECs)</td></tr>
<tr><td colspan="5">Local government</td></tr>
<tr><td colspan="5">Executive authority</td></tr>
<tr><td colspan="5">Mayoral Committees</td></tr>
<tr><td colspan="5">Political authority</td></tr>
</table>

| |
|---|
| City/ward councillors |
| Administrative responsibility |
| City officials |

Table 2: Detail of the structure, functions and authority of the South African state
(Source: drawn from https://www.gov.za/about-government/government-system/structure-and-functions-south-african-government)

Before engaging the specific interventions, a brief background is provided to foreground the engagement in the different interventions and to demonstrate the intersections between the different systems under review. This is followed by the direct engagement in the various interventions, described in terms of their scales of action.

## 6.3. Production environment

Cape Town's food system is contingent on its embeddedness within the Western Cape agricultural landscape. This next section first details the Western Cape agricultural environment and then moves to discuss Cape Town more specifically.

### 6.3.1. Agriculture in the Western Cape

Agriculture in the Western Cape is in many ways unique and does not necessarily mirror the trends evident within the national context, for example the Western Cape is not self-sufficient in Maize, a staple grain. The Western Cape's 2010 Draft Strategic Plan identified the "well-developed export-oriented agricultural sector, especially strong in viticulture, deciduous fruit, table grapes, grains and ostriches" as an area of comparative advantage (PGWC 2010, 9).

The Western Cape (WC) is prominent in South Africa both in terms of the number of people who reside within its boundaries (12%) and in terms of its contribution to the national economy (14%). The population of the province has consistently grown at a faster rate than the national population and there were an additional 123 thousand people added in 2019 (Partridge et al, 2020).

The WC economy contracted in 2019 as reflected in a -1% real change in real Gross Value Added (GVA) from 2018. The provincial economy has a large share of tertiary sectors and in particular business services (Partridge et al, 2020).

The continued impact of the drought was visible in 2019 with real agricultural GVA falling by 13% in 2019. The province's share in the national agricultural sector fell because of the contraction but remained very significant with a 15% share (See Figure 42) (Partridge et al, 2020).


Figure 42: Western Cape Share of National Agricultural Trade, 2009 – 2019 (Source Quantec, 2020)

There was strong performance observed in food processing where the sector grew by more than 4% in 2019, with many of these, apart from the significant wine region value add, being in Cape Town, many feeding of the Cape Town Fresh Produce Market. The Western Cape is more particularly dependent on horticultural production, which accounts for 47% of gross farm income for the province, compared to 18% for the rest of South Africa. Despite a declining share, The Cape Winelands remains the main agricultural area in the province, accounting for more than a third of agricultural GVA in the province. In the Cape Winelands horticultural production accounts for 60% of farm income (Partridge et al, 2020).

In 2017 approximately 2 million hectares of agricultural land was under crop production in the province, with a significant share of the land used for wheat production (17%), followed by wine grapes, canola, barley, rooibos tea, apples, table grapes, pears and oranges. The impact of the drought was also evident in private land sales where there was an annual decline in the average real price of land (-6%), the total number of sales (-15%) and in the total hectares of land sold (-16%) for 2019 (Partridge et al, 2020).

Agricultural exports from the WC had been growing strongly over recent years resulting in a growing trade balance. However, a decline in exports for 2019 meant the trade balance decreased whilst remaining substantial at R30 billion (exports = R34 billion, imports = R4 billion). There was slight diversification in terms of export destinations between 2018 and 2019 with a significant increase in the share of exports going to Africa (15% to 19%) and a slight decline in the share of exports going to the top three destinations, the Netherlands, United Kingdom and China (35% to 33%). Food, beverage and tobacco exports declined again in 2019 resulting in the trade balance falling to almost zero. Table grapes became the province's biggest agricultural export in 2019 after falling exports of wine and citrus. Continued positive performance was also noted for blueberry exports. There was substantial growth in the main two agricultural imports of rice and beer (See Figure 43) (Partridge et al, 2020).

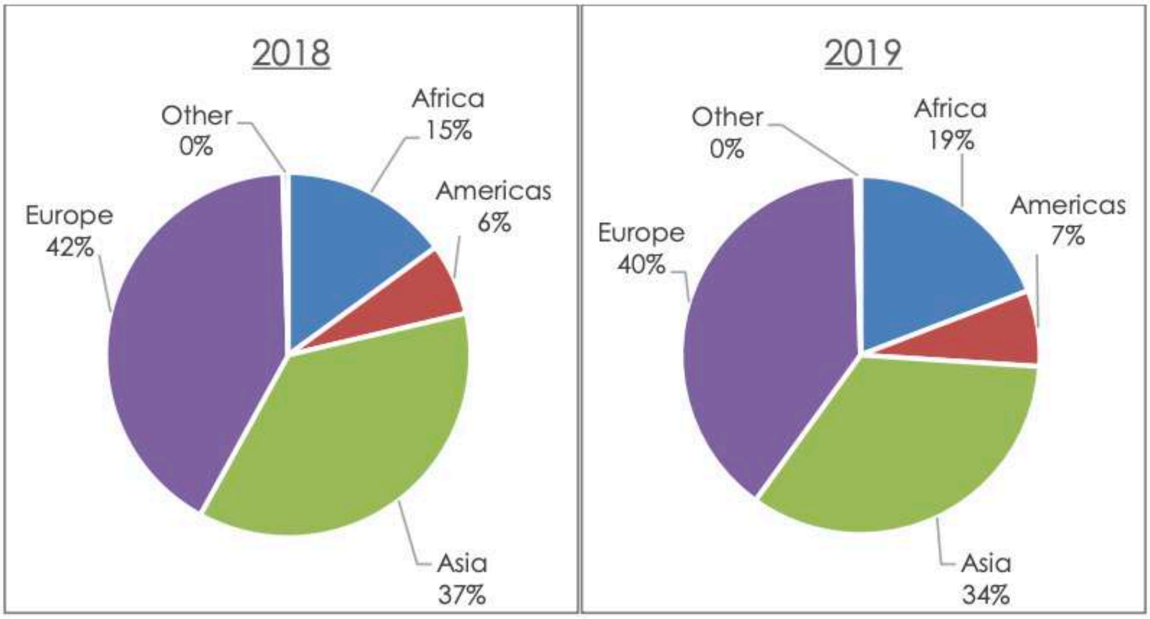



Figure 43: Western Cape Export Destinations – Regional detail, 2018 vs 2019 (Source Quantec, 2020)

Despite the contraction in both sectors, the agricultural sector created 22 thousand jobs in 2019 and the food, beverages and tobacco sector added 12 thousand, a combined total of 34 thousand jobs added for the year. The jobs created also contributed towards South Africa's broader developmental goals with increases in the shares attributable to black employees, females, the youth and rural dwellers. Almost half of all farm employees are in the Cape Winelands District, with the West Coast and Overberg together accounting for an additional third (See Figure 44 and 45). There was, however, an observed declining trend in the number of households participating in subsistence agriculture activities in the WC (Partridge et al, 2020).

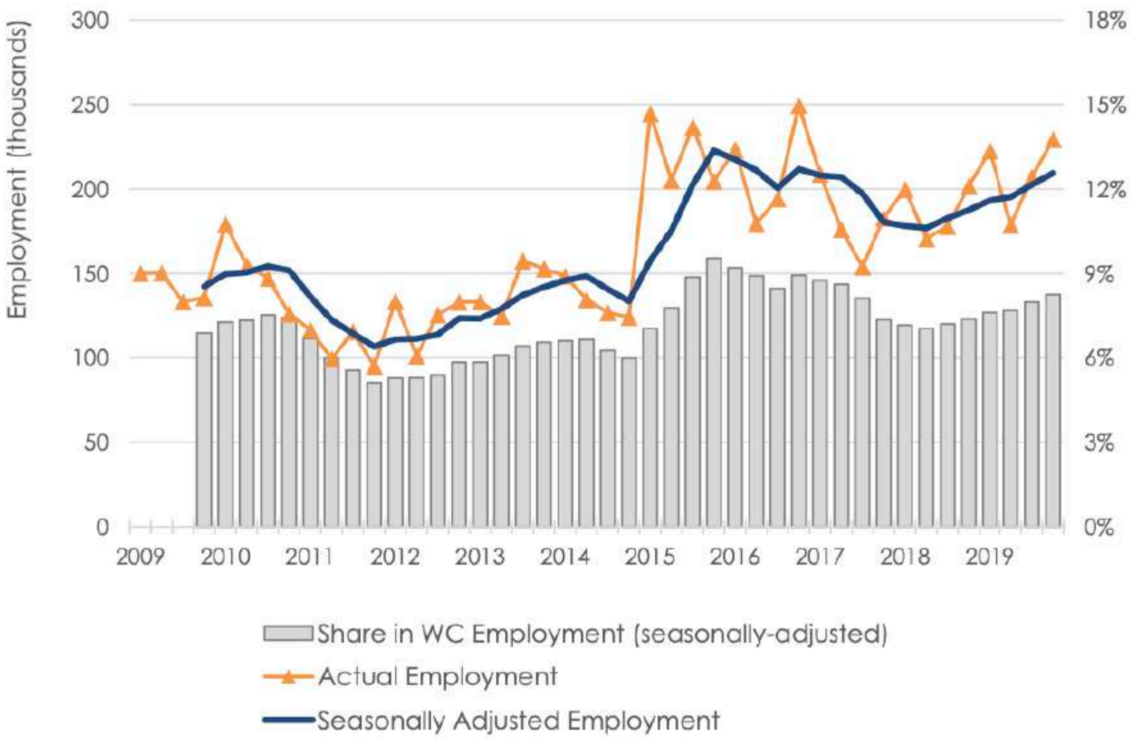
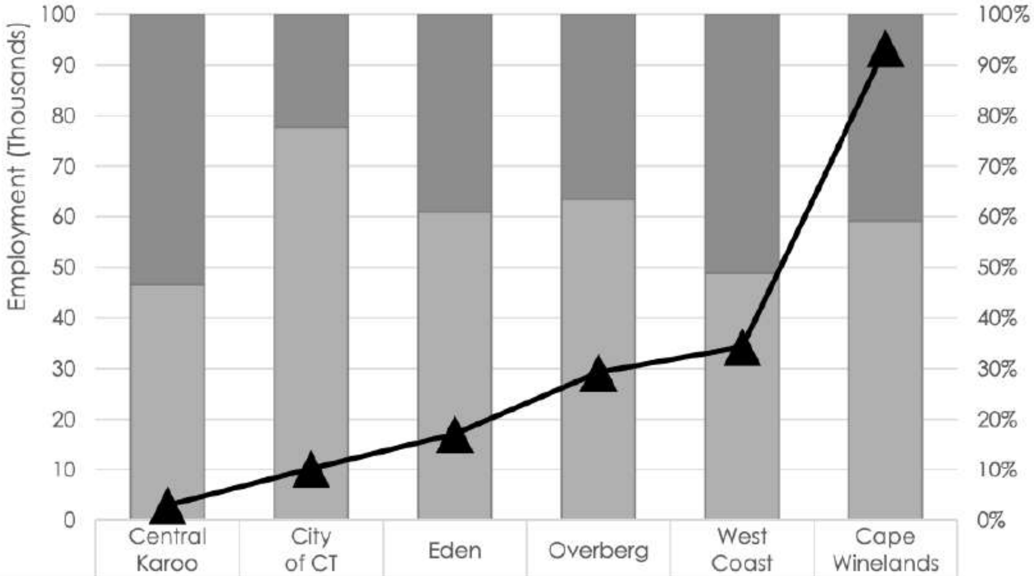



Figure 44: Western Cape Employment in Agriculture, 2009 – 2019 (Source StatsSA, 2020b)




| | Central Karoo | City of CT | Eden | Overberg | West Coast | Cape Winelands |
|---|---|---|---|---|---|---|
| Seasonal Share | 1 546 | 2 271 | 6 680 | 10 686 | 17 506 | 38 150 |
| Permanent Share | 1 348 | 7 921 | 10 394 | 18 532 | 16 771 | 55 195 |
| Total Number | 2 894 | 10 191 | 17 075 | 29 219 | 34 278 | 93 343 |

Figure 45: Breakdown of Western Cape Agricultural Employees by District in 2017 (Source: StatsSA, 2020)

Investment in Western Cape Agriculture fell in real terms in 2019 after declines in all types of investment apart from a small increase in research and exploration. Investment appears to some extent to follow production with the highest concentration in the Cape Winelands but with there are signs of convergence with disproportionately strong growth observed for the West Coast and City of Cape Town. The Cape Town growth is potentially attributed to investment in key sectors, such as micro brewing (see Table 3), processing and export driven quality processing, not necessarily production. Food, beverages and tobacco investments in the WC increased in 2019 after several consecutive years of decline. This was driven mainly by strong investments in information and communication and is increasingly concentrated in the City of Cape Town (Partridge et al, 2020).

As the population has increased in the WC, so has the number of households. However there has also been an increase in the share of the province's population reporting having insufficient food. In 2018 12% of households reported adults going hungry and 11% of households reported children going hungry. This is less than levels reported in 2015 (15% and 13%) but is higher than what was reported back in 2008 (9% and 10%). Prices in the WC increased significantly more than the rest of the country in 2019 with national inflation recorded at 4.1% and WC inflation recorded at 4.8% (Partridge et al, 2020).

The prominence of the Cape Winelands for the WC agricultural sector can be seen looking at infrastructure endowments. This district accounts for the highest number of chicken batteries, homesteads, nurseries, piggeries, tunnels, packhouses, distilleries, fruit packers, cool chain facilities, olive cellars and wine cellars. The district also has the highest number of agri-tourism activities available (Table 3) (Partridge et al, 2020).

| | City of CT | West Coast | Cape Winelands | Overberg | Eden | Central Karoo | WC Total |
|---|---|---|---|---|---|---|---|
| **Abattoirs** | 7 | 10 | 9 | 8 | 12 | 15 | 61 |
| **Crush pens/Dip tanks** | 65 | 426 | 162 | 372 | 975 | 381 | 2381 |
| **Dairies** | 23 | 35 | 41 | 118 | 215 | 0 | 432 |
| **Packhouses** | 5 | 135 | 294 | 176 | 39 | 34 | 683 |
| **Silos** | 5 | 15 | 8 | 34 | 28 | 2 | 92 |
| **Brewery** | 31 | 2 | 15 | 2 | 1 | 0 | 51 |
| **Distillery** | 2 | 0 | 5 | 1 | 1 | 0 | 9 |
| **Fruit Packers** | 3 | 37 | 115 | 36 | 1 | 1 | 193 |
| **Cool Chain** | 36 | 32 | 66 | 36 | 1 | 1 | 172 |
| **Millers** | 10 | 3 | 7 | 2 | 2 | 0 | 24 |
| **Olive Cellar** | 6 | 3 | 42 | 6 | 2 | 5 | 64 |
| **Wine Cellar** | 54 | 24 | 309 | 64 | 13 | 3 | 467 |
| **Tea Processing** | 0 | 72 | 1 | 1 | 1 | 0 | 75 |
| **Other Facilities** | 94 | 32 | 37 | 36 | 19 | 4 | 222 |

Table 3: Western Cape Agricultural Processing Infrastructure (net numbers) as of 2017
(Source: Western Cape Department of Agriculture, 2018)

Table 3 reflects the scale of production and related processing facilities in Cape Town in comparison to the wider Western Cape Region. Here the nature of the Cape Town agricultural system is evident in the cool chain facilities, breweries, wine cellars and milling facilities. This highlights Cape Town's integration into the agricultural sector but also shows that its primary role is in processing and storage rather than production.

Figure 46 provides the provincial breakdown for the number of faming units, the amount of gross farm income earned and total farm employment. The Western Cape makes the largest contribution to gross farm income and employment, accounting for 19% and 25% of the national total respectively. The province also has the second highest number of farming units in the country, approximately seven thousand in total. The Cape Winelands accounts for 29% of the farming units in the province, however it accounts for 41% of gross farm income and 50% of employment on farm. The Overberg District is the only other district with higher shares in income and employment than the number of farming units, a result of having larger farming operations in these districts (Partridge et al, 2020).

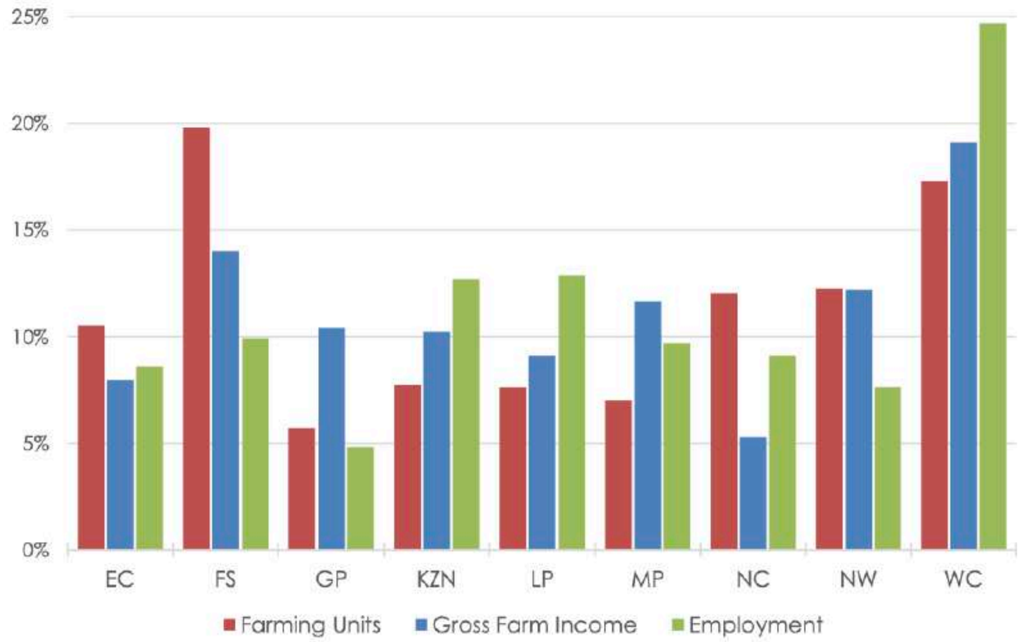



Figure 46: Breakdown of farming units, income and employment by province, 2017 (Source: StatsSA, 2020)

The Western Cape dam water levels have significantly improved since 2018 due to good rains in 2019. The water tariffs in the province continue to be higher than what is charged on average at the national level and most of the provincial large and small dams have been inspected in the last five years (Partridge et al, 2020).

Land near urban areas is under increased demand from a number of land uses. While policies such as the Land Use Planning Ordinance and the Subdivision of Agricultural Land Act may limit the potential for portioning off of land, the reality is that land, particularly agricultural land within the Cape Metropolitan Area, is in great demand and not necessarily for agriculture.

Although somewhat dated, the land valuation report from the Western Cape Department of Agriculture highlights a trend whereby smaller portions of land appear to carry higher sale value (see Table 4), placing increased pressure on land particularly from those wishing to utilise land for reasons other than those designated.

| Area | R/ha | Ha | Transaction Value | Average Farm Size | Average Transaction |
|---|---|---|---|---|---|
| Cape Town/Peninsula (0-20ha) | R 175 693 | 65 | R 10 545 000 | 13 | R 2 109 000 |
| Cape Town/Peninsula (21-50ha) | R 124 127 | 193 | R 23 935 000 | 32 | R 3 989 167 |
| Cape Town/Peninsula (>50ha) | R 91 052 | 229 | R 28 000 000 | 115 | R 14 000 000 |
| Average | R 130 290 | 487 | R 62 480 000 | 53 | R 6 699 389 |

Table 4: Cape Metropole rural zoned land prices (Source: DOAWC, 2006 Provincial Land Value Report)

Agriculture in the Western Cape may play a critical role in national agricultural production but it is also highly vulnerable. Most of the climate change models indicate that the region will become dryer as the impacts of climate change start to take hold. It a more localised scale, small changes can also impact on production where, for example, changes in the frequency and range of chill units (distinct periods when the temperature goes below a certain point) may have direct impacts on the pomme fruit (apples, etc.) industry (if not the case already). The climate challenge manifests in other ways, interacting with other challenges, such as water availability. Not only are many of the agricultural water sources under severe threat, climate change will amplify the threat. These all require proactive mitigation strategies.

As a response to climate change, carbon taxes are and will be used as a means to drive a reduction in GHG emissions. If carbon taxes were to be introduced for South African fruit this would have significant implications for Western Cape agriculture given the current export orientation. Due to South Africa's energy regime, driven by dirty coal, significant taxes could be imposed on produce being exported from South Africa to other regions, particularly our key trading partner, Europe. These taxes will have a material impact on the export viability of agricultural produce, significantly undermining comparative or competitive advantage.

The Western Cape is a critically important and highly productive agricultural region in terms of contribution to national GDP, employment and food production. The link between the food system activities that take place within the region and the economies that support these are critical. Cape Town is the key economic hub within the region, amplifying the importance of Cape Town to the broader productive food system. Cape Town is the major export point in the province.

The characteristics of Western Cape agriculture do not necessarily translate into food security or a measure of food sovereignty. The open nature of the markets means that food produced in the region may leave the region, or even the country. This challenge is one of many that highlight the disconnect between the city needs in terms of the food system and the production environment within the region. However, the importance of the City of Cape Town to the broader regional food system means that the infrastructure, knowledge, networks and support systems present within the region have the potential to support city scale activities.

The Western Cape dominates South Africa's Marine aquaculture production – accounting for 92% (3 308 tonnes). South Africa is one of the largest producers and exporters of abalone, world renowned for its premium farmed abalone. The majority of abalone production is in the Western Cape. The Western Cape accounts for 60% of South Africa's blueberry production. South Africa was the 8th largest wine producer in the world in 2019, producing 970 million litres. This accounted for 3.3% of world production. More than 85% of wine in South Africa is cultivated and produced in the Western Cape.

The Western Cape, with its temperate Mediterranean climate, is home to more than 90% of South Africa's olive growers. Olive farming has been one of the fastest growing agricultural activities in South Africa. The Province is also the largest exporter of fruit juice, accounting for more than half of South Africa's exports, and is the largest producer of wheat and oats in the country.

### 6.3.2. City of Cape Town Agricultural and Food System landscape

In 2018 the agriculture, forestry and fisheries (AFF) sector added R6 billion in Gross Value Added (GVA) to the Cape Town economy in 2018, with a real growth rate of 1.3% between 2008-2018. The food, beverages and tobacco (FBT) sector added R18.6 billion in GVA by growing at an average annual rate of 3.6% from 2008-2018. Between 2008 and 2018 the combined agriculture and agri-processing share in Cape Town's GVA increased from 4.9% to 5.8%. Cape Town's agriculture sector's real GVA grew by 5% between 2008 and 2018 and was approximately R3 billion in 2018. Total employment stood at 22 000 in 2018, with limited growth noted over the past decade (CCT: FVC, 2021)

The deregulation of the agricultural sector and liberalization of trade policies post-apartheid transformed South Africa's agricultural landscape. Although the intention was that this would create a more equitable and reliable agricultural sector, recent consolidation of the farming sector has failed to produce the conditions of reliability that would ensure food security for low-income residents of Cape Town. The consolidation of the agricultural sector, high barriers to entry, concentration of ownership, vertical integration and anti-competitive behaviour in the pricing of food (Competition Commission 2008), have all failed to enhance the reliability of food pricing (Battersby et al, 2014).

The reliability of nutritional quality and balance is not directly affected by the state of agricultural production itself. The National Development Plan (NDP) called for a realignment of agricultural production to have a greater focus on fruit and vegetable production in order to better align the sector to nutritional intake guidelines (NDP, 2012). The South African food system has historically focused on grains, to ensure cheap staple foods, and horticultural crops for export, in order to enable a positive trade balance, and not had an explicit focus on the nutritional quality and balance of goods produced. In South Africa, the increasingly open conditions of trade, have led not only to increased export of horticultural products, but a massive increase in the import of highly processed foods, which compromise the reliability of the food system in terms of nutritional quality and balance (Battersby et al, 2014).

The reliability of the agricultural sector in terms of providing safe food is an area of increasing concern, particularly with reference to water safety (Ding et al, 2021).

The changing agricultural sector has been argued to have a number of sustainability challenges associated with it. South Africa's agricultural resource base is vulnerable on a variety of fronts. Climate changes are already impacting on production with variable rainfall and other temperature and general climatic changes driving changes. When these challenges intersect with a vulnerable resource base, generally poor soils and both water scarcity and poor water management, these challenges are compounded, and the vulnerability of the sector is further compounded, as was evident with the drought in the region form 2015 – 2108.. These challenges and a more globalised market have prompted responses from farmers that while providing short-term relief, could increase vulnerability (Battersby et al, 2014).

Poor soils and erratic weather has resulted in a heavy reliance on external fertilizers and pesticides. These items are often linked to the global petrochemical market and as such, the rapid increases in these markets, particularly those linked to oil price increases, reverberate through the food system, ultimately resulting in increased food prices. This was a particular concern at the start of the Ukraine invasion, and remains a major issue, driving prices and availability of all inputs (PersCom, Faragher, 2023). The agricultural economy associated with these changes is one of high risk. At a large scale, success is often driven by changes in the approach to farming. One such change is to consolidate farm holdings and to mechanize. These changes have resulted in a significant decline in farmers and an even more dramatic decline in agricultural employment (Vink and van Rooyen, 2009). This decline in employment has resulted in a dismantling of the rural economy, one that is today propped up by social grants and remittances. Driven by these challenges, the current agricultural sector has been argued to have economic sustainability challenges. This lack of economic sustainability has led to the highly consolidated agricultural sector that is dominated by supermarkets and large processors. Alternatives to these challenges, and strategies to enhance agricultural sustainability are emerging and becoming more mainstream, However, both policy and the dominant views of the role of agriculture mean that there is a significant uphill battle needed to get to a point where the sector is transformed. More recent events such as the drought, the energy crisis, and even the conflict in Ukraine and the resultant increases in agricultural inputs have highlighted the sustainability challenges, but at the same time propelled a transition to more sustainable approaches far faster than lobbying and other efforts by academics and activists.

## Role of City

Cape Town has a long history of supporting urban agriculture within its borders (Rogerson, 2010), in fact, it is the only South African city with an urban agriculture policy (Olivier & Heinecken, 2017).

Although profoundly impacted by national agricultural trends, there is little direct role for the City in governing of this aspect of the food system. However, the City's ability to understand what food is produced within the City boundaries and its ability to base planning decisions on the viability of agricultural land would be enhanced by the data collected and collated for the Agricultural Census being better spatially aligned to recognized City boundaries. In Cape Town, Agricultural Census uses Magisterial Districts as its finest grained spatial disaggregation. This does not align to any City governance processes or to the Agricultural Areas described in the Agricultural Land Review of 2008.

However, as evidenced by a recent Trade and Investment publication, the understanding of food production in Cape Town reflects three challenging biases (Figure 47). The first is that almost all recorded data originates from formal large-scale producers. These are largely producers growing export horticultural products, not products that enhance the food environment or food security.

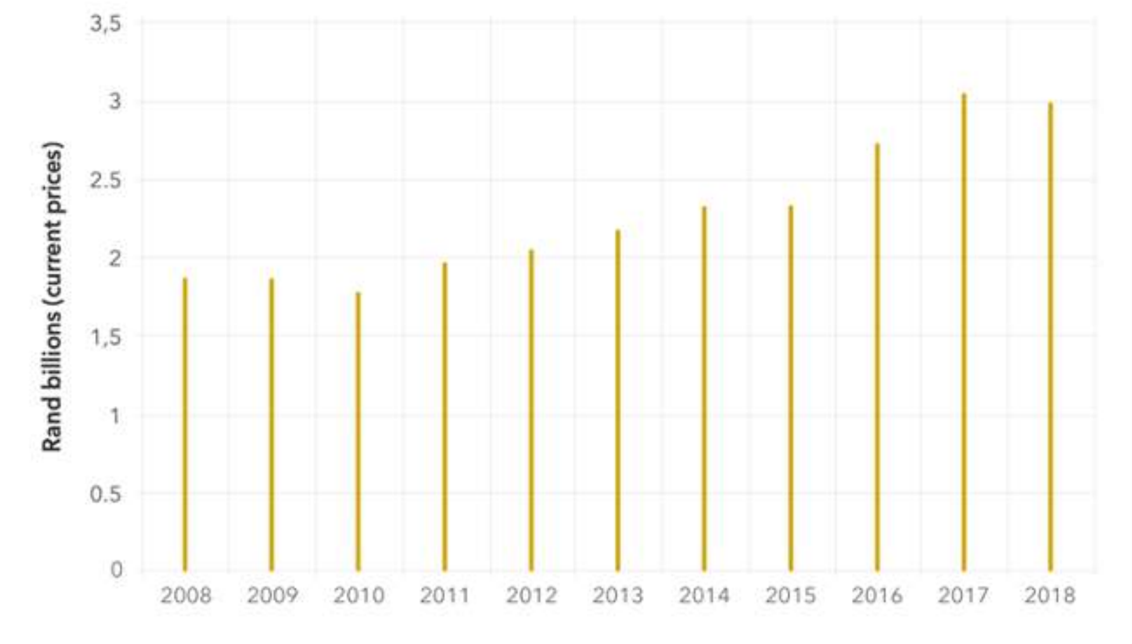



Figure 47: Agricultural Gross Value Add (2008 - 2018) (CCT: FVC, 2021)

The breakdown of products grown and recorded through the City of Cape Town reflects the same focus on formal producers. The different products and their mix of the production landscape are detailed in Figure 48. These figures reflect the disproportionate focus on Grapes (55% of mix) and a large proportion of carrots (37%) grown mostly for distribution across the country, thanks largely to the very sandy soils.

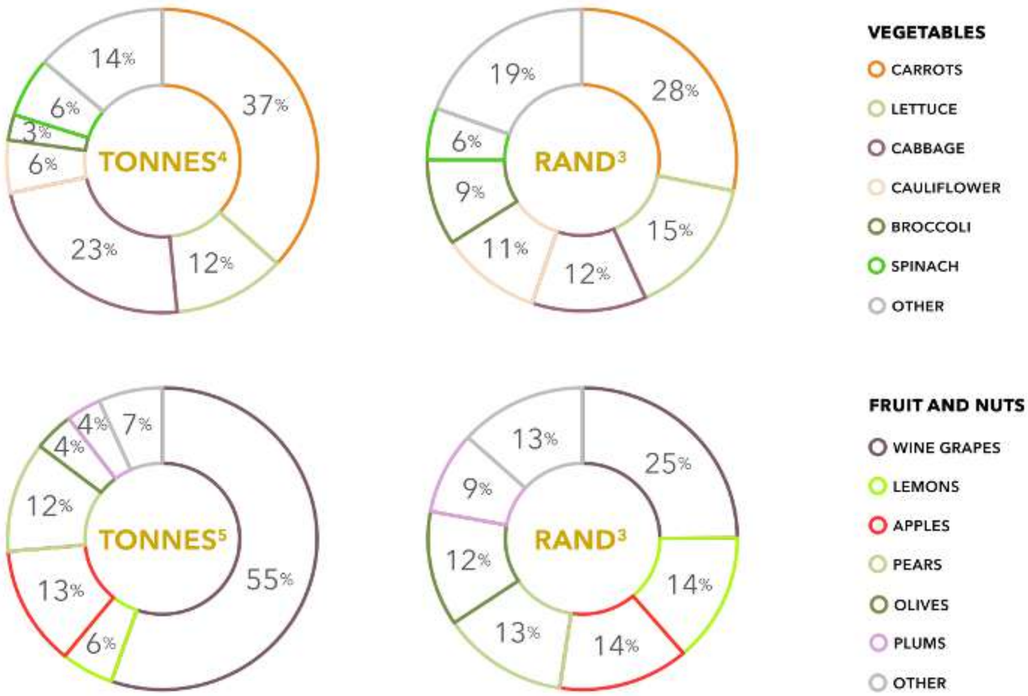



Figure 48: Breakdown of value of key agricultural commodities - an estimate 23 670 ha were used in production in 2017 (CCT: FVC, 2021)

It is important that these figures are understood in the manner in which the City of Cape Town assigns value to land. Figure 49 reflects the areas of the City of Cape Town zoned as agricultural and effectively outside the urban edge of the city. These peri urban areas are areas that are seen as the prime urban growing areas. While this may be the case, the focus on these areas alone, results in a significant disregard for other food growing areas.

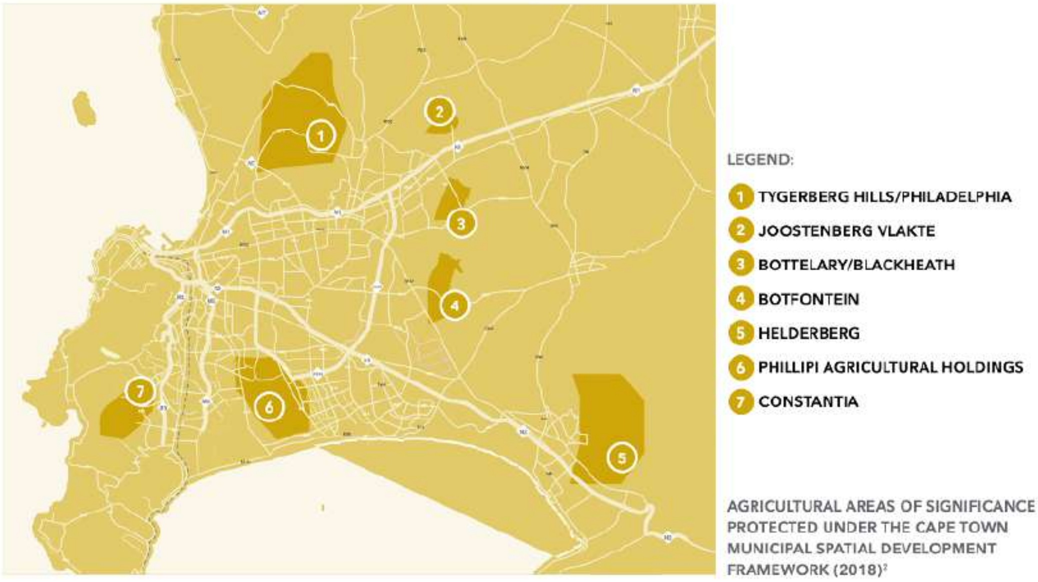



Figure 49: Designated Agricultural Areas in the City of Cape Town jurisdiction (CCT: FVC, 2021).

Of the areas depicted in Figure 49, areas 2, 5 and 7 are predominantly grape growing areas with areas 5 and 7 being on land of significant value. Area 6 is an area under constant contestation (Battersby-Lennard and Haysom 2012) but one with significant production potential. Its proximity to many of the poorer areas of the city (to the east of Area 6) also means it has the potential to serve as an agglomeration area. An often-overlooked benefit of these peri-urban food growing areas is that these play a role in moderating prices.

These productive land areas provide employment, often to those with the lowest education for whom formal employment is a challenge. The employment opportunities enable benefits beyond just wages where food and other benefits are also part of the farm labour "package" (Battersby et al, 2014).

The City plays an important role in the viability of this agricultural land. The Agricultural Land Review conducted in 2008 and the disconnection of agriculture from food security within the ALR and subsequent IDPs and MSDFs, despite the promulgation of the Urban Agriculture Policy, have undermined the long-term viability of maintaining this agricultural land.

Governance and management of these larger scale productive agricultural areas remains a constant challenge. Despite a very dated report on these challenges, from 2002, with deliberate policy and governance suggestions, very little has changed from the statement that

> Rural areas of a metropolitan region are complex areas to manage given the involvement of all spheres of government in rural affairs. The jurisdiction and responsibilities of the different parties is not always clearly defined ... The different spheres of government generally have adequate legislation and policies in place to regulate rural land usage ... [but] the problem experienced is a lack of consistency between different policies, a lack of capacity to enforce and implement, poor co-ordination between different authorities, and poor political commitment to the rural areas of Cape Town

(Setplan 2002: iv).

These issues remain in place today.

## Urban Agriculture and small scale growers

Research conducted in the Cape Flats, the densely populated area outside of the Cape Town inner city, mainly in Khayelitsha (one of the biggest township in South Africa) as well as Mitchells Plain show that urban growing is taking place but production is restrained as a result of a number of intersecting factors. This growing takes place in the context where high levels of food security are evident. The state of Food Insecurity in Cape Town's townships was described as "severe" where 89% of the households in Ward 34 in Khayelitsha are food insecure (Battersby 2011: 13) -These high levels of food insecurity were especially prevalent is female-centred households. To deal with this challenge UA is a strategy followed by the City of Cape Town (Urban Agriculture Policy 2007) as well as several NGOs as a countermeasure against Food and Nutrition Insecurity. As a result, UA is highly supported by NGOs and external donors, who contribute inputs for production and training (Paganini & Schelchen, 2018). External factors like poor soil quality, limited space, theft, economic dependence on NGO subsidies, and severe droughts impede the contributions of Urban Agriculture to food and nutrition security (Paganini & Schelchen, 2018). These factors raise critical questions as to why Urban Agriculture is promoted so heavily, and why, despite these severe challenges, the poor are still expected to solve their own issues through growing food. In addition, the poor and food insecure residents seldom see urban food growing as a solution. In the case of Cape Town in South Africa, research conducted in low-income areas of the city in 2008 found that less than 5% of poor residents were involved in any form of urban agriculture. In reality, those most active in urban agriculture were found to be wealthier people in low-income areas (Battersby, 2011).

However, despite the challenges around 4000 backyard and market gardeners in different townships in Cape Town have been trained by NGOs or the communal extension service to improve production and market access (Paganini & Schelchen, 2018). These backyard gardens are small-scale production sites (at an average 4-20 $m^2$) of vegetables, perennials, hedges and fruit trees around the home in soil or containers for self-consumption and partly for selling within the neighbourhood (Paganini & Schelchen, 2018). Market gardens are upscaled food gardens with mainly horticulture production selling directly in the community or with the support of dwellers or NGOs to other markets.

In another study, of the 60 survey participants, 93.3% were exclusively home gardeners as opposed to the rest who engaged in both home and community gardening (Kanosvamhira & Tevera, 2020). Most home gardeners farmed in the space available within a homeowner's private land area (on-plot), whereas urban community gardens are cultivation spaces under some form of collective organisation governing the conduct of activities to grow vegetables, crops, or flowers. Community gardening in Cape Town invariably occurs in spaces ranging from communally managed vacant plots, nursing home land, near shelters and on land not used on school premises (Kanosvamhira & Tevera, 2020). The major food crops grown by urban gardeners include tomatoes, carrots, spinach, butternuts, parsley, green pepper, brinjals and various medicinal herbs. Forty per cent of the participants were pensioners (Kanosvamhira & Tevera, 2020).

Research conducted within UFISAMO confirms the results of Battersby's research. A household survey of 120 urban farmers as well as in-depth research with 56 market gardeners showed that Urban Agriculture activities contribute to a source of food and in- come, but on a negligible scale. Four out of five market gardeners contribute to their house- hold income, but only for 11.6% of the farmers is UA their main income (Paganini & Schelchen, 2018). The economic benefits of urban agriculture in Cape Town remain modest (Haysom et al, 2017). One of the factors responsible for this has been identified as the limited coordination amongst supporting actors (Haysom& Battersby, 2016), but from a broader perspective equally important is the organisation of urban farmers (Voleníková & Opršal, 2016).

It is however incorrect to see food production for sale, or even household consumption as the only reasons for engagement in UA. Motivations for engaging in UA ranged from health reasons (49.6%), ecological reasons (17.4%) but only 7.4% of the growers researched in the UFIZAMO project practice UA as a strategy to generate income (Paganini & Schelchen, 2018).

Farmers are further hampered by access to inputs, the key challenge being that of water. In May 2017, 36.7% of Cape Town's urban farmers interviewed as part of the UFIZAMO project mentioned that water restriction decreased and hindered their production. From 2018 until early in 2020 (when lockdown restrictions prohibited movement of farms outside of one's home), the use of tap water for agriculture is forbidden. 30% of market gardens and 70% of backyard gardens use municipal tap water as main source (Paganini & Schelchen, 2018)

Other factors hinder urban farming practices. The success of urban agriculture is hindered by a lack of coordination between the state and non-state actors. Haysom and Battersby (2016) note that NGOs have viable urban agriculture projects, and the local government fails to work closely with this project, in so doing undermining their viability, but also limiting the possible benefits to the state led projects. There are in excess of 100 non-governmental organisations supporting urban agriculture in the city (Olivier & Heinecken, 2017). State led growing programmes are further hindered by an absence of monitoring and evaluation (Haysom & Battersby, 2016). Land tenure security presents a distinctive problem as this is a key determinant in the extent of investment put into the soil, and the wider investment in the land and property (Rogerson,2010:376). Schmidt et al. (2015) argue that urban farmers' spatial fragmentation presents a hindrance to self-organisation particularly at a local level, where the socio-economic, cultural and ethnic "diversity of the urban farmers makes it unlikely to have farmers unite and share the same interest" (Kanosvamhira, 2019).

## Is local best?

The winelands town of Stellenbosch, in the Western Cape of South Africa, represents an example of some of the potential governance pitfalls that emerging local governance bodies may encounter. In 2010, a collection of researchers and food system activists developed a local food system strategy for the town of Stellenbosch. The funding that drove this work included a distinct local, green, sustainable and food security orientation. At face value, these are all viable and laudable aspirations, contained in many similar North American and some European city-level food strategies. After a period of research, consultation and network development, in 2011, the Stellenbosch Sustainable Food System Strategy (SSFSS) was formally adopted by the town's mayoral committee, the highest decision making body in the town, receiving official endorsement. However, as of 2020, the plan is yet to be implemented (Haysom & Currie, 2022).

The Stellenbosch case demonstrates that government approval of a strategy does not equate to implementation. Given that the town had no formal food policy mandate, and as a result no budget, the Stellenbosch officials had assumed that the strategy would be implemented by civil society actors, enabled through their endorsement. On formal approval of the plan, the civil society cluster, one that had been enthusiastic about the plan, withdrew their support (Haysom & Currie, 2022). This was a strategic response to a wider political skirmish taking place at the time. There was concern that the SSFSS would be used to dictate how food relief and the local social protection and feeding scheme landscape would be governed. The civic groups' withdrawal meant that claims of representivity in the plan were lost. This bold response demonstrated how political food governance processes can be. At the same time, it showed nuanced political and strategic understanding by the civic bodies (Haysom & Currie, 2022).

Two factors require further consideration. The "local is best" vision of the SSFSS imagined the conversion of much of the vineyards to more food-type produce, often demanding higher water use, even if farmed in a sustainable manner (Haysom & Currie, 2022). While laudable and while the sustainability considerations could have mitigated some issues, this would have exposed the town to a number of stressors, undermining resilience, a factor that became abundantly clear during the Western Cape drought, which began in earnest in 2017, and lasted until 2019. Secondly, while the civic groups withdrew their support, they did not reject the plan itself. Recently due to increased food insecurity, due to Covid19, the civics have again convened around the plan, adopting a more cautious approach, using the plan as a guide to convene a wider grouping of food system actors, with the ultimate goal of developing a new plan, but avoiding the pitfalls of the SSFSS (Haysom & Currie, 2022).

Importantly however, the absent mandate meant that the Stellenbosch municipality needed to act on the food challenges in its municipality. In responding, the municipality endorsed the re-establishment and realignment of the Stellenbosch Food Security Initiative (the initiative that saw the establishment of the SSFSS). The Stellenbosch FSI (2.0) has been functional since 2020 and have been actively supported by and aligned to the Stellenbosch SCAN, which has a Food Security Working Group launched in 2020. To date the FSWG has worked on various Stellenbosch food system issues (food relief, food flows, mapping food actors and services, food systems research, etc), and is represented by NGOs, SU, Stellenbosch Municipality, Small Scale farmers, and businesses related to food systems. These more recent initiatives took place with little reference to the earlier SSFSS which is arguably a good thing, given the flaws in the SSFSS. However it does show the importance of pluralistic and cooperative food systems governance at a local scale.

This case study is used to reflect on the nature of the Cape Town food system and wider resilience considerations. Cape Town is celebrated for its unique biodiversity and its diverse food system, one borne out of its deeply violent and complex history.

South Africa is not an ideal agricultural environment and despite a productive agricultural economy, the sustainability considerations associated with this mean that a large number of foods should not be grown in the region. This presents an interesting dilemma, one which some argue that Capetonians need to shift their diets to more local and sustainable foods, but in effect, are asking City residents to limit their diet considerably as many foods are ill suited for production in the region. Drought, extreme heat, poor soils, winter rainfall that does not coincide with the growing cycles of most foods consumed, and other factors, all combine to limit the production options in the region. For this reason, a diverse diet, sourced from a variety of local regional and international sources is perhaps the most sustainable food system for Cape Town. See the reality as depicted in Figure 50, tracking the origins of three key foods consumed in Cape Town.

Currently this is a view taken by the City of Cape Town Resilience department. Here the view is one of first understanding the food system, then optimising this for the best possible social, environmental and governance outcomes. Concerns about the volatility of international trade are real and were encountered during the initial phases of the invasion of Ukraine. However, the City of Cape Town strategy is one of risk management and planning for such eventualities and engaging these challenges, and many others, in order to optimise food system outcomes.

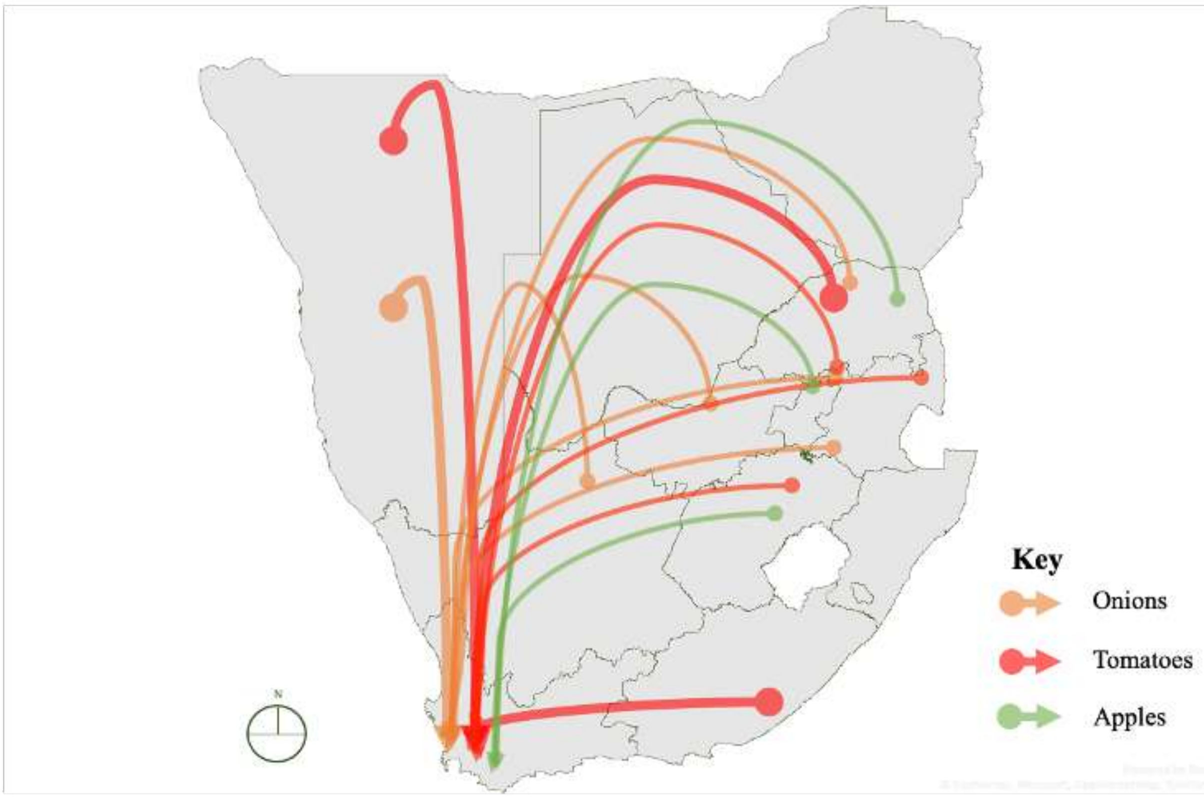



Figure 50: Map showing flow of onions, tomatoes and apples into the Cape Town Market between May 2021 and June 2022 (Source: Pulker, 2022 - Adapted from Cape Town Market Data from May 2021- June 2022)

Aerial view of one of the oldest market areas in Cape Town, Greenmarket Square (Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

## 6.4. Food diversity and staple foods

Despite the current absent urban food considerations, cities and the food system have always been connected. There is debate as to whether "modern" agriculture led to the development of cities or whether the desire to live in collective ways (early urban) led to the domestication of agriculture (see Pacione, 2009; Beall and Fox, 2009). However, while this debate may be productive from a historical perspective, in the context of a modern urban food system the reality is that this is a false debate. Whichever came first is less important than the overriding fact that it is the relationship between cities and food systems that has enabled some cities to grow and flourish, while others have not (Steel, 2008). Cities and the food system are connected. Reviews of texts such the "A Pattern Language" (Alexander, 1979) provide insight into these connections with early towns and cities serving as the marketplaces for produce arriving from the rural hinterland.[16] . These relationships had a direct impact on how the city grew and the shape and form of these cities. Cities are however always growing, changing and evolving. No place is ever in stasis. Cities grow and adapt to a variety of forces that shift the relationships between function and form. Changes to the changing food system precipitate significant changes in urban function and perhaps even form.

The processes of globalisation have altered the relationship between cities and food. The relationship between cities and the state has also changed. These changes are an important area of focus in the urban governance discourse (Healey 2004; Macleod and Goodwin, 1999; Jessop, 1998; 2002). With this shift being described as a "move from the Fordist-oriented approaches of the 1960s to forms of aligning to a liberalised ideology of entrepreneurialism" (Harvey, 1989: 4). The governance shift from a system where the state was seen as the enabler of access to items considered to be of the public good, such as food (see May 2017), to one where the private sector serves this function, is perhaps most evident in the urban food system.

[16] This quote is used with due appreciation of the critique of this text and the associated limitations (see: Dawes, and Ostwald 2017). It is used here for is historical reference and not as an endorsement of the positions argued in the text.

Increasingly private sector actors determine and construct the food systems of cities. The expansion of shopping malls in Cape Town is a prime example (Peyton et al, 2016; Battersby and Peyton, 2014). In the Cape Town case, city officials cannot account for the number of malls but rather only the planning applications received (See Battersby et al, 2014). The process of urbanisation has also played an important role in the changing relationship between food and cities.

In a time when the rural demographic environment dominated, there were clear and understood links between food security and agriculture. As society has urbanised, policies and governance mandates have not kept up with these changing demographics. This perspective is further reinforced by how policies emanating from such a department are birthed. Here food security related processes are strategically organised to reinforce the rural mandate. The ways in which food systems data are assessed perpetuate a rural and production oriented view of both the causes and drivers of food security that then cascade into governance-related actions (Drimie and Ruysenaar, 2010; Battersby, 2012). These processes reinforce a ruralised view of both the location of the food insecurity challenge, as well as the resultant response strategies.

Rural food security remains a concern. However the predominance of exclusively rural views of the food security challenge are inappropriate in a country that is over 65% urbanised (UN-DESA, 2018). Two additional systemic processes require that governance actors directly challenge the espoused and dominant rural and production oriented solutions to food insecurity: Firstly, despite imaginations of rural production by smallholders and notions of empowerment through land reform (REF), the colonial and apartheid era processes of dispossession and the destruction of a black farmer class means that the urban food system has in fact dominated the South African food landscape since the early 1900's (See Wolpe, 1972; Bundy, 1972). This was further reinforced as part of an industrial strategy, designed to keep urban wages low, through a system that saw cheap staple foods being accessible in these urban areas (Wolpe, 1972). Secondly, South Africa was an early adopter of the supermarket revolution (Weatherspoon and Reardon, 2003; das Nair, 2018). The resultant consolidation and downstream food system changes, across almost all value chains, was facilitated by the structural changes within the South African food system that stemmed from the combined industrial policy and later Apartheid state enabled (White) farmer support structures. These deliberate apartheid and colonial dispossession and spatial management processes enabled an accelerated industrial food system transition. Today, this means that the majority of South Africans (both urban and rural) are fed by large consolidated corporate entities (Greenberg, 2016). Ironically this process was accelerated following the transition to democracy through the liberalisation of the South African food system.

Central to this discussion is the notion that despite the private sector dominance of the current food system, this dominance has been enabled by a particular governance trajectory. This trajectory originated from a need for cheap labour, hence dispossession and associated laws and taxes to enable this (Bundy, 1972), but also a restructuring of the agricultural economy to privilege one class of farmer (Wolpe, 1972). These foundations then oiled the transition to the liberalised South African food system of today (Greenberg, 2017). Ironically, it is argued that despite the deeply unequal and unjust ideologies informing governance processes, the governance approach of the South African food system of the early 1900s was in fact dominated by an urban orientation. Examples of this remain present in today's cities, from municipal commonage areas, to fresh produce markets, to abattoirs, to bylaws around raw milk sales, etc.

Given this history it seems somewhat strange that the current food security, and wider food system governance, perspectives fixate on a rural orientation. This may be ideological but the consequence of ignoring the fact that South Africa is predominantly and urban country, that poverty is increasingly urbanised, that food security is as much of a challenge in cities as it is in rural areas, all demands a different approach to food security, one that engages in and responds to the everyday challenges of food access encountered by many urban residents in South African (Crush and Frayne, 2010; PMBEJD, 2019). For many South Africans "historical injustices of people in South Africa remain geographically, socially and economically isolated from the conversation the country is having about healthy food options." (Mbalati, 2019). These perspectives require further engagement in the state, location and nature of food security in South Africa.

It is this history that has meant that Capetonians have a very limited diet. The consumption of a limited number of key staples is a legacy of an industrial policy. Ironically maize, considered the staple by many today, was not originally part of the diet in Southern African indigenous groups, groups who had mastered the production of a number of millets, growing these to counter the vagaries of climate and rainfall in a region where only 3% of the land is suitable for production, and received adequate rainfall to support that production.

This history needs to be read in the reported dietary diversity findings from the different FANTA aligned surveys carried out in Cape Town. In the 2015 Hungry Cities Partnership survey it was found that there is considerable variation in the quality of diets across the city.. The mean Household Dietary Diversity Score (HDDS) in the surveyed households was 6.75 out of a possible 12 with a standard deviation of 2.63. Scores of six or less are considered a proxy for poor nutritional outcomes in a household. Fully 43% of households fall into this category and nearly one-third of households have scores of 5 or less. Around 20% of households have extremely poor nutrition (with HDDS scores of 4 or less) (Crush et al, 2018).

Overall, the Cape Town diet is high in calories and carbohydrates, as evidenced by the main food items consumed by households. Approximately 90% of households consumed foods within the grains category of which maize, pasta, bread, noodles and rice are key food items. The other food items in the top five food groups consumed were sugar or honey (most often sugar in tea and coffee), coffee and tea, and foods made from oil, fat or butter. This could misrepresent the actual nutritional quality of the diet even in households with a score of 5 or more. Many households supplement items cut from their diets with non-nutritive food categories like tea and coffee, and often increase sugar consumption to provide energy. As a result, a household with a HDDS score of 5 may, in fact, only be consuming three nutritionally adequate food types (Crush et al, 2018).

Sixty-seven percent of households consumed foods within the animal protein category. Only 56% of households ate vegetables and 45% ate fruit. Given the relationship between food access and nutrition, the low levels of consumption of legume crops raises interesting questions about the food system and its intersection with other systems. While legume-type foods are relatively affordable, they take a significant amount of energy and time to cook. the food system and its intersection with other systems (Crush et al, 2018).

It is likely that these items are being removed from the diets of poor households, not because of food price constraints but because of their costs to the household in terms of energy and time. Given that Cape Town is a coastal city, it might be expected that fish and other seafood would be affordable. However, these foods are generally the preserve of high-income groups (Crush et al, 2018).

## 6.5. Typical food basket for different income categories

The typical Household Food Basket is a methodology that has been designed together with women living in low income areas in some of the country's metros. The Household Food Basket is not a nutritionally complete basket, but it represents the basket of food that women try to secure each month, depending on affordability constraints. The Food Basket is also not *the* basket for every family living in a low income area of the city, but it is a useful proxy for what the most important or typical foods may be for a family.

The Household Food Basket consists of 44 different types of food, and 14 hygiene and domestic products.

In February 2024, the Household Food Basket cost R5 111, 05 in Cape Town. Given that the national minimum wage is R4 270, 56 per month, this shows that the majority of a low income family's monthly income would be spent on food, if they were to purchase the complete Household Food Basket. The so called "core food" of the food basket (which includes products such as maize meal, rice, cake flour, cooking oil, sugar, salt, potatoes, frozen chicken, bread, and tea), cost R2 810, 24 in February 2024, and is over R100 more expensive than in February 2023. The change in cost for the complete food basket is R348, 96, which shows a 7.1% increase in costs from February 2023 to 2024 (Figure 51).

| Summary of Household Affordability Data | |
|---|---|
| **National Minimum Wage Feb 2024 (21 working days)** | |
| *General workers at R25,42/hr* | **R4 270,56** |
| *General workers at 10% exemption at R22,88/hr* | R3 843,50 |
| Minimum underspend on food in Feb 2024 | **-54,3%** |

| **Cost of Household Food Basket in February 2024** | | |
|---|---|---|
| Cost of *Joburg* Household Food Basket | | R5 357,53 |
| Cost of *Durban* Household Food Basket | | R5 262,95 |
| Cost of *Cape Town* Household Food Basket | | R5 111,05 |
| Cost of *Springbok* Household Food Basket | | R5 573,89 |
| Cost of *Maritzburg* Household Food Basket | | R5 124,04 |
| Cost of *Mtubatuba* Household Food Basket | | R5 388,22 |
| ***Average cost of Household Food Basket (all areas).*** | | **R5 277,30** |
| ***Month-on-month change*** | **-R47,56** | **-0,9%** |
| ***Year-on-year change*** | **R348,96** | **7,1%** |

| **Cost of foods prioritised & bought first in Household Food Basket: year-on-year Feb 2023 to Feb 2024** | | |
|---|---|---|
| **Core foods** | **Feb_2023 cost** | **Feb_2024 cost** |
| Maize meal *(30kg)* | R 309,43 | R 289,17 |
| Rice *(10kg)* | R 134,06 | R 170,01 |
| Cake Flour *(10kg)* | R 122,42 | R 129,25 |
| White sugar *(10kg)* | R 179,75 | R 208,13 |
| Sugar beans *(5kg)* | R 171,53 | R 204,13 |
| Samp *(5kg)* | R 66,64 | R 62,97 |
| Cooking oil *(5L)* | R 178,88 | R 155,52 |
| Salt *(1kg)* | R 14,38 | R 15,75 |
| Potatoes *(10kg)* | R 89,56 | R 112,61 |
| Onions *(10kg)* | R 125,69 | R 89,85 |
| Frozen chicken pieces *(10kg)* | R 390,68 | R 410,12 |
| Curry powder *(200g)* | R 33,09 | R 37,69 |
| Stock cubes *(24 cubes x2)* | R 43,65 | R 47,55 |
| Soup *(400g x2)* | R 43,08 | R 48,39 |
| Tea *(250g)* | R 25,41 | R 29,52 |
| White bread *(25 loaves)* | R 408,73 | R 422,11 |
| Brown bread *(25 loaves)* | R 368,54 | R 377,47 |
| **Subtotal of core foods** | **R2 705,53** | **R 2 810,24** |

Figure 51: Summary of Household Affordability Data in February 2024, and the cost of prioritised food in Household Food Basket (PMBEJD, February 2024)

Drawing on the HCP 2015 survey, the mix of foods consumed is evident. As detailed above, Capetonians in general have a limited diet and even more limited dietary diversity. As stated, across the city 67% of households consumed foods within the animal protein category and 56% of households ate vegetables and 45% ate fruit (Crush et al, 2018). Grains make up the bulk of foods consumed. Grains as a category requires further analysis. Such detail is limited to small case study surveys. However, traditionally grains have been mostly maize but also processed foods such as bread or pastas. Increasingly though, the popularity of ultra-processed foods is evident, with two-minute noodles and instant porridges replacing more traditional foods, accelerating the nutrition transition. This transition is not solely driven by a desire for western diets or ignorance on the part of the consumer, but rather, as a result of the interplay between energy, specifically energy costs, but also reliability, time poverty and other infrastructural challenges (Frayne and McCordic, 2015). The Household Consumption of Foods from Different Food Groups offers insights into the dietary mix across the City as evident in Figure 52.

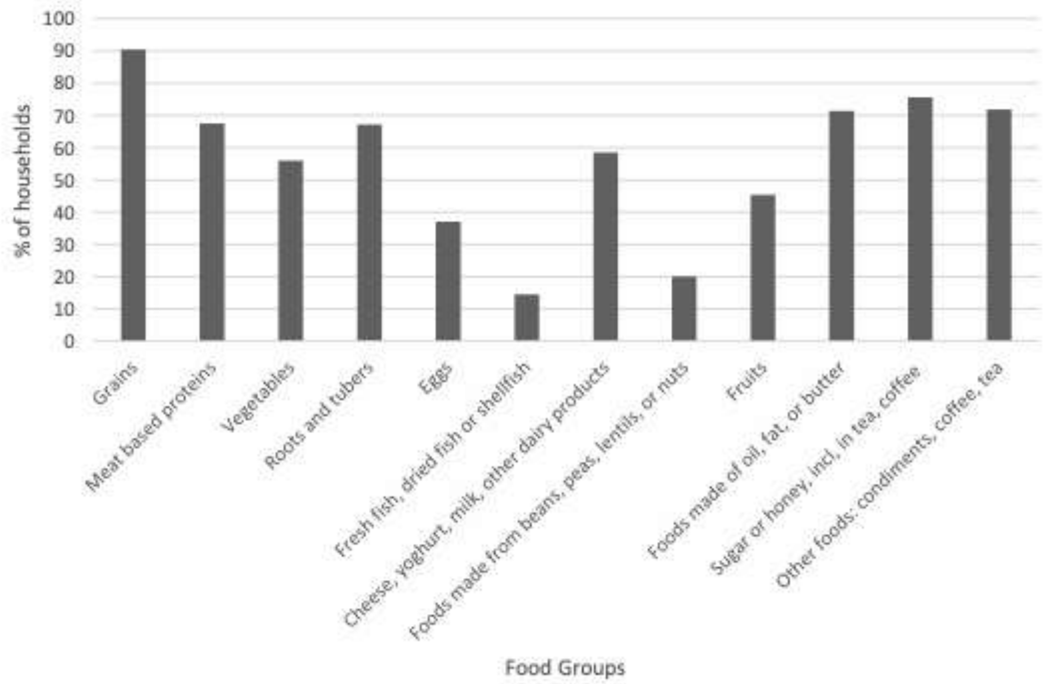


Figure 52: Household Consumption of Foods from Different Food Groups (Source: Crush et al, 2018: 29)

when tracking the different foods consumed, Swart noted that "the most significant changes in processed food retail have been observed in carbonated drinks. The consumption of soft drinks has increased over time, with the most notable changes being evident in the consumption of carbonated drinks (sweetened non-alcoholic drinks that contain carbon dioxide). Soft drinks sold increased from approximately 60.4 litres per capita per annum in 2006 to 91.2 litres per capita per annum in 2019 (63% increase). Consumption of cereals increased although shifts took place within the cereal range, with rice consumption decreasing from 11.2kg per capita to 9.1kg per capita, and pasta/instant noodles replacing rice. Bread consumption increased, with the most notable changes being in packaged bread" (Swart, 2023: ).

It is also worth noting that according to the National Nutrition Consumption Review, the list of top 10 household food expenditure items does not include any fruits and vegetables in all income decile households. When expenditure on the top 35 food items is considered, only tomatoes, onions, cabbages, apples and bananas appear on this list.

## 6.6. Nature of the food economy

The Western Cape is an established hub for food and beverage manufacturing, boasting some of the country's largest companies in the sector. It is the second largest producer of food and beverage products among South African provinces. The province has a vast and productive agricultural hinterland with distinctive yields, excellent transport infrastructure, and strong manufacturing capabilities. Proximity to Africa's growing consumer population makes this a very competitive location in which to base food and beverage manufacturing operations. Recent growth in food and beverage exports provides reason to believe that the sector is well-placed to realise the opportunities presented by growing demand for food and beverage products on the African continent (CCT:IVCT, 2021).

A number of large international companies have invested in agribusiness in Cape Town and the Western Cape, including Nestle, Burger King Corporation, DuPont, Lindt & Sprungli, and Spar. In 2019 Pepsico announced a takeover of Western Cape based Pioneer Foods for US$1.69 billion as part of their strategy to grow their presence in Africa. South Africa was the 3rd largest global outward investor into Africa's food, beverages and tobacco sector, with 69 investment projects between January 2003 and December 2019. At a provincial level, the Western Cape was the 3rd largest global province for FDI into Africa's food, beverages and tobacco sector, with 51 investment projects between January 2003 and December 2019 (CCT:IVCT, 2021)..

Agro-processing has been identified by the South African Government as one of the critical sectors earmarked for special attention. In particular, there is an emphasis on the need to grow the agricultural and agro-processing value chain as a key provider of labour-intensive growth. As a direct result of this, the US$75.11 million Agro-Processing Support Scheme was launched in 2017 to ramp up investment and value-addition across the sector (CCT:IVCT, 2021).


Figure 53: "Leading agribusiness companies in Cape Town and the Western Cape" (Source: CCT:IVCT, 2021).

At the provincial level, five sectors contracted during the second quarter of 2023. The mining sector recorded the largest sectoral contraction (-3,6% quarter-on-quarter); however, due to its minimal contribution to the Western Cape economy (0,2% share), this translated into only subtracting 0,01 of a percentage point from the total provincial growth rate. This was followed by the transport and communication sector, which recorded a contraction of 1,9% quarter-on-quarter, and subtracted the most from the total provincial growth rate with -0,2 of a percentage point. The electricity and water (-0,9%), trade and hospitality (-0,6%), and construction (-0,4%) sectors also recorded quarter -on-quarter contractions, and subtracted a combined 0,1 of a percentage point from the province's total growth rate in the second quarter (CCT:EPIC, 2023).

The second quarter performance by the manufacturing sector shows slight improvement with a second consecutive quarter of growth at a higher rate than the previous quarter. In contrast, after three consecutive quarters of positive growth, the construction sector recorded a contraction (CCT:EPIC, 2023).

Despite the economy still stumbling along its growth path, it is still useful to compare economic activity to pre-Covid-19 levels as a way of monitoring economic recovery since the pandemic. Overall economic activity in the Western Cape (shown as total GDP) continues to be higher than that of the fourth quarter of 2019. At the sectoral level, four sectors (finance and business services; community and social services; *agriculture*; and transport and communication) managed to maintain economic activity at levels higher than their respective pre-pandemic levels, with the addition of a fifth sector: general government. For the second quarter of 2023, the construction, trade and hospitality, manufacturing, electricity and water, and mining sectors' economic activity levels remained below their respective pre-pandemic output levels. In the quarter under review, all of these (five) sectors also recorded lower rand value output than in the previous quarter, with the exception of the manufacturing sector, which edged closer to its pre-pandemic level (CCT:EPIC, 2023).

Despite these economic gains, this has not translated into an improved household economic situation. This is most evident in food price inflation in Cape Town. Tracking and monitoring food price changes has become increasingly important as household incomes continue to face pressure, threatening access to affordable food for many families. Figure 54 tracks food price inflation in the Western Cape, which has been displaying an upward trend since the beginning of 2020. It appears that food price inflation in South Africa has now finally caught up with the global trend of declining food prices experienced since March 2022. In the second quarter of 2023, food price inflation was lower compared to the corresponding period a year ago, averaging 11,6% (compared to 12,8% previously) (CCT:EPIC, 2023).

For the second quarter of 2023, five of the nine food items that are tracked recorded increases when compared to the previous quarter. The food items that demonstrated the highest average inflation rates in the second quarter of 2023 were vegetables (21,2%, increasing from 16,8%), and breads and cereal (16,2%, decreasing from 18,1%). The oils and fats (0,6%), fruit (-1,6%), meat (7,4%) and bread and cereals (16,2%) sub-categories saw inflationary increases lower than their respective recordings in the previous quarter (CCT:EPIC, 2023).

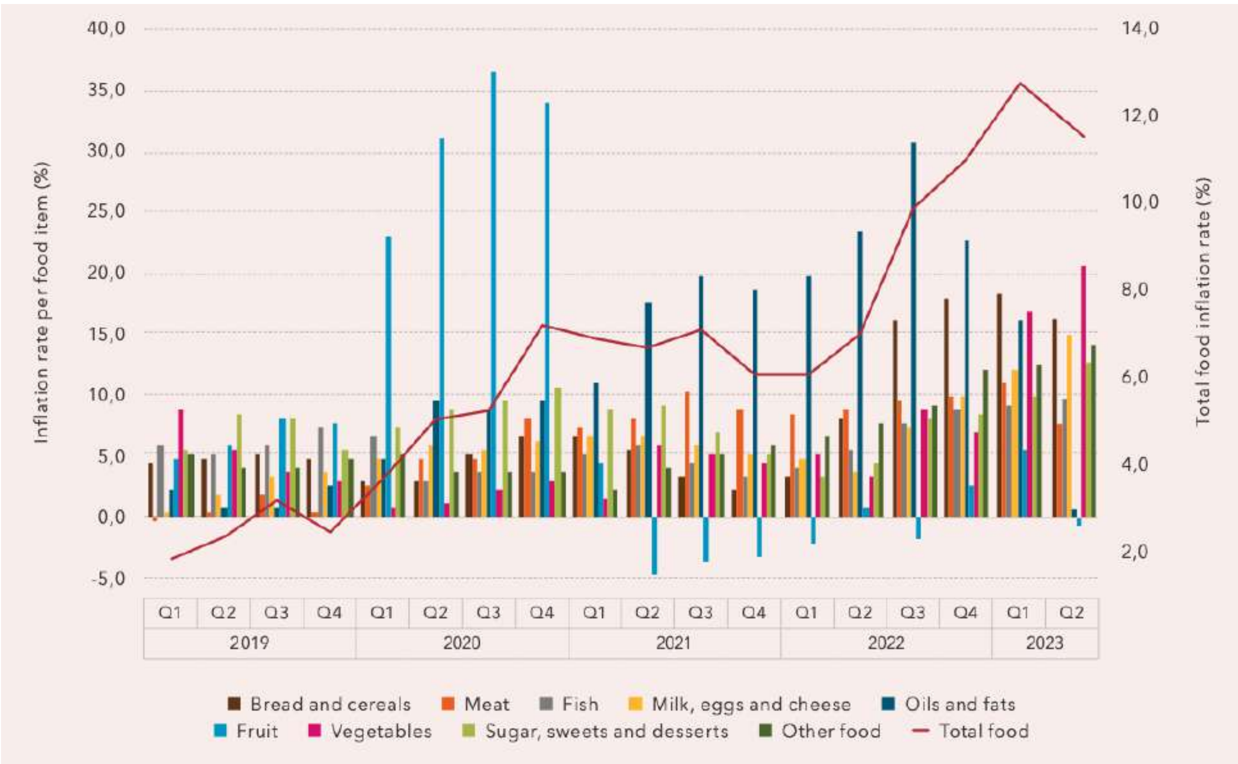



Figure 54: Western Cape Food Price Inflation, 2019 Q1 - 2023 Q3 (Source: CCT:EPIC, 2023)

According to the BFAPs statement for June 2023, a key factor influencing food prices was global energy and input costs reaching their peak and then moving lower. Further supporting the decrease in input prices was the strengthening of the rand compared to earlier in 2023. Additional factors that could influence future commodity prices include: currency volatility (upside or downside); the termination of the Black Sea Grain Initiative by Russia as of 17 July 2023 (upside); and the likelihood of an El Niño Southern Oscillation (upside). BFAP stated that, if consumers are not observing these declining price trends in the supermarkets, this could be as a result of the supermarkets' direct costs with their suppliers and/or the fact that they are "recovering some incurred costs before passing the applicable savings on to consumers". (Meyer et al, 2023). As is evident in the earlier Figures generated by the PMBEJD these price reductions are most certainly not being felt by the consumers, pointing out that year-on-year the cost of the average household food basket increased by R348,96 (7,1%) from R4 928,34 in February 2023 to R5 277,30 in February 2024 (PMBEJD, 2024). When measuring the cost of the basic nutritional food basket, other factors come into play. Here "year-on-year, the cost of a basic nutritional food basket for a family of 7 members increased by R507,79 (8,6%) from R5 922,97 in February 2023 to R6 430,76 in February 2024 (PMBEJD, 2024:6) and for Cape Town specifically, "year-on-year, the cost of the Cape Town household food basket increased by R168,60 (3,4%) from R4 942,45 in February 2023 to R5 111,05 in February 2024" (PMBEJD, 2024: 12). However, increases cannot be measured on food alone and again, the PMBEJD group recorded and report these issues where "year-on-year" the cost of the household domestic and personal hygiene products basket increased by R96,19 (10,4%) from R926,51 in February 2023 to R1 022,71 in February 2024 (PMBEJD, 2024: 5).

These figures sit within a wider food economy that intersects with multiple food system processes.

## Grocery Retail Sector Market Inquiry[17]

On the 30th of October 2015, the Competition Commission (CompCom) gave notice in the Government Gazette announcing the establishment of the Grocery Retail Sector Market Inquiry in terms of Section 43B(2) of the Competition Act no 89 of 1998. The Gazette set out the Terms of Reference which would guide the work of the Inquiry, the GRSM Inquiry. The CompCom initiated the Inquiry in order:

> to understand how the grocery retail sector operates because there was reason to believe that there existed features, or a combination of features, in the sector that prevented, distorted or restricted competition; and to achieve the purpose of the Act.

The Inquiry was conducted in four phases:

1. involved the publication of the ToR, initial background consultations, literature review and the publication of the Statement of Issues, Guidelines for Participation and Administrative Timelines;
2. involved information gathering through site visits and re- visits, surveys, targeted consultations, information requests and public hearings;
3. involved the processing and analysing of information, identifying information gaps, follow up consultations, targeted consultations, and information requests to address any identified gaps, culminating in the publication of the Preliminary Report; and
4. involved the formulation and testing of recommendations, drafting and publication of the Final Report.

The Statement of Issues contained the Inquiry's envisaged framework to assist the participants in the Inquiry to focus on issues that the Inquiry deemed to be the most relevant in answering questions arising from the ToR. In line with the scope of the Inquiry, and as set out in the Terms of Reference, the Statement of Issues proposed to assess competition in the grocery retail sector according to these stated objectives.

> Objective 1: The impact of the expansion, diversification and consolidation of national supermarket chains on small and independent retailers in townships, peri-urban and rural areas and the informal economy.
>
> Objective 2: The impact of long-term exclusive lease agreements entered into between property developers and national supermarket chains, and the role of financiers in these agreements on local competition in the grocery retail sector.

[17] This section on the Competition Grocery Retail Market inquiry has been pasted in full as the detail cannot be deleted for want of selective editing. As such, this entire section is verbatim from the Competition Commission Grocery Retail Market Inquiry report, with some minor edits in tense and numbering to align with the wider report. The reference is as follows: Competition Commission of South Africa (CompCom)(2019). The Grocery Retail Market Inquiry: Non-confidential Report, Competition Commision, Pretoria, 25 November 2019.

Objective 3: The impact of the dynamics of competition between local and foreign national operated small and independent retailers in townships, peri- urban and rural areas and the informal economy on competition.

Objective 4: The impact of regulations, including, among others, municipal town planning and by-laws on small and independent retailers in townships, peri- urban and rural areas and the informal economy.

Objective 5: The impact of buyer groups and buyer power of the national retail chains on small and independent retailers in townships, peri-urban and rural areas and the informal economy.

Objective 6: The impact of certain identified value chains on the operations of small and independent retailers in townships, peri-urban and rural areas and the informal economy.

The Inquiry reached out to numerous stakeholders operating at different levels of the grocery retail value chain across South Africa and received both written and oral submissions. The stakeholders that participated included the national supermarket chains, small and independent retailers, spaza shop owners, Fast Moving Consumer Goods (FMCG) suppliers, consumers, local authorities, provincial and national government departments, and industry regulators. The Inquiry received more than 500 submissions from the main parties, held over 80 round-table discussions as well as public hearings in the Western Cape, KwaZulu Natal, and Gauteng. These public hearings were supplemented with six mini-public hearings in Limpopo, Mpumalanga, the Northern Cape, the Eastern Cape and the North West, in the form of site revisits. In addition, the Inquiry also conducted site visits to spaza shop owners, grocery retailers, wholesalers and other stakeholders at a number of sites in towns and cities where local grocery retailing issues had been brought to its attention.

On the basis of these submissions, the Inquiry published its Preliminary Report on 29 May 2019 setting out its initial findings and proposed recommendations, and invited stakeholders to make submissions in response. Having considered the views and submissions from stakeholders arising from the Preliminary Report, the ConpCom's GRSM Inquiry was then duly completed with a Final GRSM Inquiry. Report.

Broadly, the Inquiry found that a combination of features in the grocery retail sector were deemed to potentially (may) prevent, distort or restrict competition and negatively impacted on the achievement of the purpose of the Competition Act. In particular, three principal areas of concern warrant remedial action:

1. Long-term exclusive lease agreements and buyer power;
2. Competitiveness of small and independent retailers; and
3. The regulatory landscape.

Market structure and the Inquiry's scope of analysis:

By way of context, the grocery retail sector is characterised by low levels of economic regulation and openness of markets.

*The openness of the sector has enabled the increased expansion of corporate retailers to the displacement of small and independent businesses.*

This displacement has been further exacerbated by the ease of entry in the informal segment, leading to the replacement of small and independent retailers, which were primarily family operated and mainly serviced rural and non-urban communities, before the boom of shopping malls in these areas. It is within this context that the Inquiry has considered the competitive dynamics in the grocery retail sector.

There are low barriers to starting survivalist informal spaza shops. However, there are significant challenges to building them into thriving, competitive businesses that can enter the higher value segments within grocery retail, such as tenancy in formal shopping malls. The ConpCom's GRSM Inquiry believes that there is a need to remove impediments to the increased and effective participation of SMMEs and operations owned by Historically Disadvantaged Individuals (HDI) in the grocery retail sector. Making markets more inclusive, as anticipated by the provisions on the purpose of the Competition Act, not only addresses social imperatives but also provides a platform for more competitive markets, which benefit consumers.

The ConpCom's GRSM Inquiry considered the market structure of the grocery retail sector, and found that it is complex, consisting of numerous players including manufacturers or suppliers of grocery retail products, buyer groups and distributors, wholesalers, hybrid wholesalers (i.e. wholesalers that also have retail supermarket offerings), national supermarket chains, speciality stores, emerging challenger retailers, independent retailers (formal and informal) and consumers.

At the supplier level, there are a number of firms who manufacture and supply various FMCG products to different retail platforms. These suppliers are of varying sizes, with a limited number of large multi-product firms. Similarly, the wholesale level comprises a number of formal players such as buyer groups and cash and carries, who primarily supply the independent and informal retailers such as spaza shops.

The retail level of the value chain is segmented between the formal and informal channels. The formal retail segment is characterised by the presence of the incumbent national supermarket chains, speciality stores and the emerging challenger retailers, while the informal segment mostly has an active presence of small and independent retailers including general dealers and spaza shops. The sale of grocery products takes place through both the formal and informal retail channels. The formal channel is the larger and more important distribution segment. Within the formal channel, a large proportion of grocery product sales (over 50%) takes place in shopping centres which are primarily occupied by national supermarket chains as the anchor tenants.

Following the publication of the Preliminary Report, stakeholders submitted that in order for the Inquiry to conduct a competition assessment and make findings, it must define relevant product and geographic markets, in accordance with international standards and previous decisions of the Competition Tribunal. Stakeholders also submitted that the ConpCom's GRSM Inquiry was inconsistent and contradictory in the use of its 'market definition' in that in some instances it considered a broad national grocery retail market, and in others a narrower segment, for formal retailers.

The ConpCom's GRSM Inquiry sets out below its responses to these stakeholder submissions and sets out a legal framework for the conduct of this ConpCom's GRSM Inquiry and the approach adopted in respect of market definition and the appropriate framework to consider in defining the grocery retail market.

All the stakeholders that raised concerns regarding the issue of market definition appear to have conflated Chapter 2 and Chapter 4A of the Competition Act. An aspect of importance in making a distinction between the Commission embarking on an investigation that is conducted under Chapter 2 of the Act and conducting a market inquiry, in terms of Chapter 4A, is noting that the ConpCom's GRSM Inquiry is much more widely focused. The former is only concerned with prohibited conduct by an individual firm (or group of firms) while the latter is much broader in its reach and is concerned with features of markets that may hinder competition, consumer choice or effective participation, often not ascribed to a single firm.

> Section 43B of the Act, which deals with the initiation of market inquiries, contemplates that some notion of a market is relevant in the conduct of a market inquiry. However, this is not in the context as may be envisaged in some of the Chapter 2 abuse of dominance cases of the Act. The purposes of the Act are also emphasized in the preamble to the Act which states that the Act exists to *"provide for markets in which consumers have access to, and can freely select, the quality and variety of goods and services they desire"*.

The ConpCom's GRSM Inquiry pointed out and made it clear that the point of defining markets is to allow for the identification of competitive constraints on specific firms, and to be able to estimate the size and position of a firm in a specific market. The market definition process is essentially an analytical tool which assists in identifying these constraints and thus is used where appropriate. The ConpCom's GRSM Inquiry further worked from the premise that what is more telling in the conduct of a competition analysis is the presence and level of competitive constraints that firms face. Developments in economic literature show that in instances of differentiated product and service markets, such as we have in retail markets, a strict and traditional approach to market definition is not always possible due to the difficulty of determining how close a potential substitute must be in order to be included in the market.

The broad grocery retail market is differentiated between supermarkets and convenience shopping which are differentiated by the type of shopping expedition they primarily seek to service or target, and which is reflected in the size, and range of products on offer. These are not necessarily perfect market boundaries and there will be a competitive overlap between the two. Large supermarkets, which are mainly in malls, may still be conveniently located, and shopping malls in general also attract daily shoppers. Convenience stores come in various sizes, with some having a fairly extensive range that caters for a larger weekly shop. Similarly, large weekly shopping may obviate the need for some top up convenience shopping, and competitive convenience store pricing may result in some items falling off the weekly list.

Alongside these two broad types are also specialist stores. These stores stock a single product range but typically with complementary products. These specialist stores will also interact competitively with the supermarket and convenience stores in various ways.

The ConpCom's GRSM Inquiry believes that what is most relevant is that there is likely to be a greater closeness of competition between stores located within the same shopping mall for the same product lines. It is less inconvenient for a consumer to purchase some products at one store then move to another store in the same mall for some additional items, than the alternative of visiting numerous different locations. In the same way, shops within a strip mall would also compete more closely if they sold the same product. The rationale here is also convenience. This conclusion has relevance to both grocery competition and to the interaction with speciality stores. The use of exclusivity provisions to keep out specialist stores which only compete with certain product lines, is a recognition that supermarkets do interact competitively with these in a mall and would impact on sales of their own product lines. In considering the importance of shopping malls as destinations for consumers, access to such malls also impacts on other objectives of the Competition Act such as participation in the economy.

From a geographic market perspective, the most common approach is to consider localised markets because consumers tend to shop within the vicinity of where they live or work, or on the route to and from work. This focus is reinforced by the fact that shopping malls and strip malls consider the catchment area around their location when determining what their likely footfall will be. However, as much as there is product differentiation, there is also spatial differentiation which impacts on the closeness of competition and competitive constraints imposed by different outlets.

The local nature of markets does not eliminate the fact that there are several competitive variables which may be set nationally due to head office purchasing deals. For example, products may be listed nationally, have common retail prices within the supermarket groups, and have coordinated promotions due to national advertising policy. However, some (if not most) aspects of competition are also determined locally. The size of the store, its product range, local promotions and range selection, and store layout are all likely to be impacted by local competition dynamics. While these may not always relate to price (except through promotions), they go to other demand-related variables which affect consumer welfare such as product range, variety and innovation, as well as the overall shopping experience.

The ConpCom's GRSM Inquiry adopted the position that both local and national competition is important. While many aspects of grocery retailing markets may be localised, the nature of the issues under consideration (such as exclusive leases and buyer power) are replicated across the country and thus create a national phenomenon which provides a further reason for the Inquiry's assessment to be conducted on the basis of the broader retailing of grocery products, taking into account the possible narrower markets that may exist. The adoption of such a broad approach to its assessment, allowed the ConpCom's GRSM Inquiry to assess the multifaceted nature of the competition dynamics that underscore the issues raised

### Market concentration

Following the publication of the Preliminary Report, the national supermarket chains submitted that the Inquiry had over-estimated their market shares and the resultant levels of concentration in the grocery retailing sector. They attributed this mistake to the inclusion of revenue realised from the sales of non-grocery products and out of country sales. The ConpCom's GRSM Inquiry accepted the submissions by the national supermarket chains and revised its concentration ratio estimate for grocery retailing. The ConpCom's GRSM Inquiry defended their view that the grocery retail sector is characterised by high levels of concentration, with the top five retailers accounting for approximately 64% of the market.

The levels of concentration in the formal retail channel are reinforced by the high levels of barriers to entry that seem to exist at this level of the value chain. It is common cause that entry at this level requires the acquisition of land and buildings which necessitates significant capital expenditure, the realisation of significant economies of scale and scope, the establishment of an extensive distribution network in order to be competitive, and compliance with stringent regulatory requirements in order to remain operational. The Inquiry also finds that the formal segment is characterised by high barriers to entry and expansion at the supplier level of the value chain.

The Inquiry established that the national supermarket chains were vertically integrated in that they act as both distributor and retailer of groceries. This vertical integration appears to confer some competitive advantage as there is recognition that such strategies yield efficiencies in the distribution system and savings for suppliers. This vertical integration does not appear unique to the national supermarket chains as some buyer groups have also adopted this strategy and established their own central distribution centres while some of the buyer groups have members who also own distribution centres.

The ConpCom's GRSM Inquiry found that the market structure of the grocery retail sector creates a conducive environment for a significantly altered bargaining framework between the national supermarket chains and their suppliers (whether suppliers of FMCG products or property developers). This altered bargaining framework leads to distortions in competition between the national supermarket chains, emerging challenger retailers, specialist stores and those firms that are serviced by the wholesalers and buyer groups, i.e. independent stores and spaza shops.

From a customer perspective, the purchasing decisions (underpinned by demand-side considerations) made by consumers across LSM groups tend to be informed by the same factors, namely price, availability, convenience and quality. Low income households, for example, appear to rely on both spaza shops and the national supermarket chains for their grocery needs. For customers that reside in non-urban areas, the national supermarket chains and spaza shops serve a useful substitutable and complementary purpose. It seems that consumers shop at spaza shops (where they generally spend less than 40% of their budget) for the convenience of location and trading hours, mostly for day-to-day items, whilst they shop at the national supermarket chains for weekly and monthly shopping where price, variety, quality and packaging size matter. In non-urban areas, spaza shops serve a useful convenience role (akin to that of convenience stores in the garages located in the urban areas).

Such a consumer dynamic was expected, and is the general norm, given that there is acknowledgement that asymmetrical competition dynamics exist between large national supermarket chains and independent grocery retailers in the informal retail channel. Consumers may find that large national supermarket chains are substitutes for independent grocery retailers under certain conditions, particularly where a large national supermarket chain is able to service the convenience aspect that spaza shops have traditionally filled.

## ConpCom's GRSM Inquiry Findings

### Long-term exclusive lease agreements, buyer power and their distortions on competition between grocery retailers

When viewed within a bargaining framework, there appears to be a sustained pattern of behaviour by the national supermarket chains and their counterparts (whether property developers or suppliers of FMCG products) that:

- enables or results in the exercise of market power by the national supermarket chains to the exclusion of smaller, independent stores as well as emerging challenger retailers such as OBC, Choppies, Fruit and Veg City and Food Lovers Market; and
- creates a conducive environment for the exercise of buyer power, with its concomitant distortion of competition between the national supermarket chains, wholesalers and independent retailers.

This pattern is demonstrated in long-term exclusive leases in shopping centres and the payment of rebates by suppliers to the national supermarket chains, both of which have the effect of:

- reinforcing the levels of concentration in the formal retail segment;
- entrenching incumbency by the national supermarket chains; and
- raising barriers to entry for small and independent retailers and thus removing a crucial element for competition in the retail ecosystem.

Cumulatively, the distortions to competition arising from this pattern resulted in restricted consumer choice.

### The impact of long-term exclusive lease agreements on competition in the grocery retail sector

- The bargaining power possessed by the national supermarket chains (as anchor tenants) manifests itself in the requirement for exclusivity in lease agreements. While some of the national supermarket chains alleged that the financiers of property developments required such exclusivity, the Inquiry established that this is not the case.
- The ConpCom's GRSM Inquiry established that financiers typically require property developers to secure national supermarket chains as anchor tenants that will remain operational in the development for the duration of the loan repayment period, which is usually ten years, before they are willing to finance a development.
- The ConpCom's GRSM Inquiry found that national supermarket chains (as anchor tenants) took advantage of this requirement by requiring exclusivity, claiming that this is to protect their investment and compensate them for accepting the risk of paying rent for ten years, irrespective of the success of the mall.
- The ConpCom's GRSM Inquiry established that there was a pattern of sustained use of long-term exclusive lease agreements by the national supermarket chains in shopping centres across South Africa. The pattern of these long-term exclusive lease agreements appears to have persisted over long periods with the initial lease period being generally 10 years. When regard is given to the renewal clauses in these lease agreements, some of these contracts could endure for at least 30 years.
- The ConpCom's GRSM Inquiry found that given the high levels of concentration in the formal retail channel, primarily through national supermarket chains, the foreclosure effects that arise as a result are significant. Whilst the historic focus of the effect of exclusive leases was on competition between the national chains, the Inquiry has focused on the effect of such leases on the entry and expansion of smaller challenger retail chains and independent stores, including specialist retailers. The Inquiry has found that exclusive leases have substantially hindered the emergence of challenger retail chains to the main four national retailers and has also served to prevent economic participation by small independent retailers, including specialist retailers.
- The ConpCom's GRSM Inquiry established that the vast majority of Shoprite and Spar leases, and a majority of Pick n Pay leases, contained exclusivity provisions. Woolworths leases do not contain explicit exclusivity provisions but have provisions which impact on letting and usage. The Inquiry finds that clauses which simply provide a limited exclusion on the zone area around the tenant in respect of certain businesses which pose a risk of undermining the maintenance of health and safety standards of a tenant are not objectionable. These clauses do not restrict the entry of competing rivals in shopping centres nor do they dictate where in the shopping centre a rival tenant can operate their business. However, the Inquiry is of the view that these clauses must have an objective justification and must be reasonably related to such justifications.

A number of small independent retailers and the emerging challenger retailers provided evidence of their inability to access shopping centres across the country as a result of the long-term exclusive lease agreements. Property developers also affirmed that these long-term exclusive lease agreements prevent the would-be entrants from entering the shopping centre environment in competition with the national supermarket chains.

Much has been made, by the national supermarket chains, of the fact that the emerging challenger retailers or small specialist stores could and are able to grow outside of the shopping centre environment. The Inquiry also established that these emerging challenger retailers and independent stores have been forced to seek alternative avenues in order to compete in the grocery retail sector. The Inquiry finds it concerning that their growth and competitive ability has been substantially limited because of exclusion from the shopping malls. Notably, the Inquiry established that consumers generally spend a significant portion of their grocery expenditure in shopping centres and that small and independent retailers and the emerging challenger retailers are deprived of this custom as a result of being excluded from shopping centres.

The ConpCom's GRSM Inquiry expressed concern that the observed pattern of the use of long-term exclusive lease agreements serves to sustain and entrench incumbency and the current levels of concentration in the grocery retail sector. In essence, the current exclusive leases prevent emerging chains from developing to the point where they can suitably play the anchor tenant role in new developments, which means that the same four retail chains are the only candidates, thereby perpetuating and entrenching their cumulatively dominant position. Furthermore, given the slightly different LSM or consumer targeting of these chains, there would typically only be a few that might be appropriate for any single new development given location and target market.

The ConpCom's GRSM Inquiry found that the distortion of competition arising from the use of exclusive long-term lease agreements are also aided and abetted by the presence of usage clauses stipulating the purpose of the space that is being leased and limitations on the landlord's right of letting the rental space. The Inquiry established that the usage clauses essentially stipulate not only current business activities but also those the national supermarket chains could potentially engage in at the shopping centre in future such as sale and hire of video recorders and accessories, electronics and communications.

The ConpCom's GRSM Inquiry stressed that this conduct is akin to the national supermarket chains carving out potential product markets that they may wish to enter in the future without explicitly prohibiting property developers from leasing out rental space to suppliers of these particular products. The Inquiry was provided with evidence of instances where retailers in these carved out potential product markets would be allowed to operate in the shopping centre environment. However, their tenancy would be immediately terminated by the property developers once the national supermarket chain decided to expand into these carved out product markets. Some of the limitations to the landlord's right to let included the requirement that property developers must consult the national supermarket chains on the tenant mix and any future developments. The usage clauses further stipulate the location and size of potentially competing stores that could be allowed in a shopping centre.

The national supermarket chains provided a number of reasons in justification of long- term exclusive lease agreements. These justifications ranged from the view that exclusivity is aimed at compensating the national supermarket chains for having committed to a long-term agreement with its concomitant risk factors, to compensation for the investments made.

The ConpCom's GRSM Inquiry argued that the justifications provided by the national supermarket chains were not compelling. Although historically the national supermarket chains did not possess sufficient information and the tools to gauge the economic viability of the areas which they were entering and thus relied on exclusivity as a means of protecting themselves, this is no longer the case. With the proliferation of information and the sophistication of research tools, national supermarket chains are able to assess realistically the viability of opening a store in a particular location. Evidence before the Inquiry indicated that a detailed and intensive viability assessment is made by these national supermarket chains before entering into a lease agreement. Further, risk is also reduced for these chains through negotiating low rental rates and transferring more of the development costs onto other tenants, thereby reducing the need for exclusivity clauses. Most importantly, all businesses take on investment risk as part of doing business and the ability of the national retail chains to transfer this risk to property developers and other tenants simply reflects their considerable market power. Other tenants are not able to mitigate such risks in the same manner.

In summary, the Inquiry finds that the pattern of the sustained use of exclusive long-term contracts has not only restricted competition and given rise to consumer harm, but that it also violates the purpose of the Act which seek, amongst others, to ensure that small and medium sized enterprises are afforded an equitable opportunity to participate in the economy. The Inquiry is particularly concerned that these practices have effectively excluded widespread participation in the retail sector where barriers to entry should be low, thus fundamentally undermining the objectives of the Act and broader national economic policies aimed at facilitating transformation and economic inclusion.

The ConpCom's GRSM Inquiry was made aware of allegations that line tenants are not only affected by exclusive lease agreement clauses but by other terms enforced by property developers such as high rental costs. It was argued that property developers are forced to transfer costs for managing the shopping centre onto the line tenants to appease the requirements of the anchor tenants for low rental rates. The Inquiry is concerned that the higher cost of rental for the smaller tenants limits their ability to effectively compete and to grow their businesses. This constraint applies to existing tenants that are not direct competitors to the national retail chains due to the exclusive leases but would also apply to smaller specialist stores or challenger chains in the event that they gain entry in future. The Inquiry is therefore concerned that simply eliminating exclusive leases may still not achieve greater levels of competition and economic participation if these businesses are faced with high rental costs relative to the national chains.

The ConpCom's GRSM Inquiry found that such conduct is generally widespread as part of the business model in the retail property leasing environment. The practice is premised on a number of justifications provided by the property developers which include market forces; size and position of the unit to be let; visibility of the unit to be let; footfall likely to be created by the tenant; depth of the store; the cost of installing the tenant; and trading densities. The Inquiry notes that the bargaining dynamics between landlords and the national supermarket chains do appear to have an influence on the differential treatment accorded to different customer groupings. The Inquiry finds that this conduct is akin to the waterbed effect.

### Buyer power and its impact on competition in the South African grocery retail sector

The ConpCom's GRSM Inquiry found that the presence of buyer groups in the grocery retail sector has beneficial competition outcomes for members (generally traditional and hybrid wholesalers as well as independent grocery retailers), who largely operate in the informal retail trade segment. In particular, buyer groups enable wholesalers and independent retailers that lack economies of scale to be able to pool their purchasing power in bargaining with suppliers of FMCG. The Inquiry established that buyer groups play a pivotal role in improving the competitiveness of wholesalers and independent retailers. It is against this finding that the ConpCom's GRSM Inquiry assessed the bargaining dynamics between the suppliers of FMCG and the national supermarket chains as well as the buyer groups. The Inquiry sought to determine whether the exercise of buyer power by the national supermarket chains, relative to that of buyer groups and wholesalers serving smaller retailers, had an effect on competition at the grocery retail level of the value chain.

The ConpCom's GRSM Inquiry found that the structure of the formal grocery retail segment is characterised by factors that are conducive to the existence of an unequal bargaining framework between the national supermarket chains and suppliers, especially relative to wholesalers and buyer groups. The Inquiry established that the national supermarket chains are a critical route to market for the suppliers of FMCG products, based both on revenue and volume contributions. With few exceptions, there was evidence of the inability of FMCG suppliers to walk away from negotiations with national supermarket chains and the rigidity of trading terms, particularly related to the composition and quantum of the terms. The national supermarket chains are able to extract more favourable trading terms than customers in the informal segment.

The findings of the ConpCom's GRSM Inquiry suggest that in some instances there is no clear rationale to explain the difference in the quantum of the rebates paid to the national supermarket chains and to those obtained by those customers in the informal segment, other than simply differential buyer power. In some instances, even where the national supermarket chains were not the largest customers, they were still able to extract better and more favourable trading terms than buyer groups, who were the larger customers. This differential treatment is indicative of the exercise of buyer power.

In particular, the national retail chains have moved to demanding rebates to cover the costs of certain retail store level activities, such as merchandising, store openings and refurbishment, advertising and promotion, access to shelf space and category management.

The primary discriminatory effect of these rebates is that they are by their very nature not made available to wholesalers and buying groups servicing the independent retailers, because the wholesalers do not serve the retail store function given their lack of vertical integration. The implication is that independent retailers, which also incur these self-same costs, do not benefit from similar rebate categories and, therefore, are placed at a material and competitive disadvantage to the national supermarket chains.

The ConpCom's GRSM Inquiry held the view that these rebates are more favourably offered to the national supermarket chains, which, as a result reduces their costs of offering FMCG products, maintains their market positions and provides an unfair competitive advantage over the independent retailers. The costs of the independent retailers, owing to their lack of vertical integration with wholesalers, are not reduced to the same extent. The independent retailers incur all of these costs with no rebates, even in instances where they qualify for the rebates as they conduct the same activities of ultimately placing products on shelf. This ultimately impedes these independent retailers' ability to compete and grow.

Furthermore, whilst some of these rebates paid by FMCG suppliers appeared to be underpinned by productive efficiencies (as in the case of distribution allowances), there were some which did not appear to have any efficiency or beneficial justification, they were simply a reflection of buyer power by the national chains. Further, the Inquiry found mixed evidence about the pass-through of rebates to the final prices paid by consumers. This is particularly concerning since some suppliers factor in the cost of these rebates to the price paid by the national supermarket chains for the products. This could potentially have a price- raising effect on the cost of products to the detriment of consumer welfare where such rebates are not passed through. Further, there is a lack of transparency regarding back-end margins.

The Inquiry has concluded that cumulatively, the grocery retail sector possesses features and characteristics that are conducive to the exercise of buyer power. The indicative evidence obtained through the rebate analysis attests to the exercise of such power to the detriment of independent retailers and smaller retail chains, and potentially also to consumers.

Following further engagements with stakeholders, the ConpCom's GRSM Inquiry did not receive any evidence that challenged the existence of buyer power by the national supermarket chains. However, the Inquiry noted the justifications proffered for the difference in treatment between the national supermarket chains and other customer segments such wholesalers and independent retailers, namely, the provision of efficient distribution services and valuable data on end-consumer purchases which suppliers can use to improve their business strategies. Wholesalers and independent retailers were said to be unable to offer these services due to their lack of vertical integration. The Inquiry also received submissions, particularly from the suppliers of FMCG products, indicating that there is a recognition of the need for a more balanced treatment of the different customer segments.

The Inquiry engaged with stakeholders to discuss possible recommendations to deal with those instances of unreasonable and unjustified differential treatment. The Inquiry decided that a code of conduct premised on the principles of fairness and transparency would be an appropriate and proportionate means of addressing the concerns raised. While the suppliers of FMCG had differing views regarding what should be contained within such a code, and to whom it should apply, the ConpCom's GRSM Inquiry found that, in the main, suppliers supported the principles of fairness and transparency.

The ConpCom's GRSM Inquiry noted the direct entry and diversification of Shoprite under its "Usave e-Kasi" brand into the spaza shop segment.

*Given the evidence and discussion of the buyer power possessed by the national supermarket chains, the Inquiry finds such direct entry and competition to spaza shops to be very concerning.*

Given the asymmetric competition that exists between the national supermarket chains and spaza shops, as well as the massive buyer power held by these retailers, such entry and diversification, if allowed, can only have the effect of obliterating ordinary spaza shops. This conduct warrants action by policy makers.

The ConpCom's GRSM Inquiry received submissions that indicate how the high levels of concentration in the formal grocery retail sector and the position of the national supermarket chains in the grocery value chain have created disadvantages for smaller suppliers (emergent, black and smallholder producers), and effectively acts to exclude these smaller producers from the agro-food value chain. The Inquiry received evidence indicating that the buyer power of national supermarket chains, exercised in the context of rebates, externalises the risks of national supermarket chains and passes them up the value chain towards farmers and producers and also limits the ability of smaller suppliers to access shelf space in the formal retail segment, as these smaller suppliers cannot afford the rebates required.

Some small suppliers believe that access into the formal retail channel can be promoted through supplier development funds. The Inquiry was made aware of the difficulties faced by small suppliers in terms of qualifying for the existing supplier development programmes and substantively benefitting from them.

The ConpCom's GRSM Inquiry noted that concern over unfair trading conditions in the food value chain, as well as the impact on prices paid to smaller and historically disadvantaged suppliers, has culminated in an amendment to the Act in the form of (a new) section 8(4) directed specifically at the abuse of buyer power by dominant firms in designated sectors.

The ConpCom's GRSM Inquiry noted that the national supermarket chains recognise the need to ensure and to increase access by smaller suppliers to shelf space in the formal retail segment. Each of the national supermarket chains have established a supplier development programme in which they have invested funds towards the development of a diversified supply base. This action is commendable and ought to be developed further in order to optimise the gains to competition that arise.

### Shifts in the competitive landscape and the impact on small and independent retailers

The ConpCom's GRSM Inquiry noted that spaza shops and independent retailers in peri-urban areas developed at a point in time where, as a result of the apartheid regime's spatial policies and construction of the economic landscape, there was no close competition whether from national supermarket chains or foreign nationals in the immediate vicinity. Since 1994, this economic landscape has changed dramatically.

The ConpCom's GRSM Inquiry found that the entry of the national supermarket chains into township areas has shifted the competitive landscape in those areas. The observed decline or exit of spaza shops and independent retailers, especially in the rural towns, can partly be attributed to this change. The ConpCom's GRSM Inquiry also found that as spaza shops and independent retailers in townships were grappling with this changing competitive dynamic, there was, simultaneously, increasing competitive pressure from foreign-owned spaza shops that have displaced, in some cases, local- owned spaza shops.

The ConpCom's GRSM Inquiry found that spaza shops and independent retailers serve a critical role in the grocery retail ecosystem, particularly for those residing in peri- and non-urban areas. Despite the lower prices offered by supermarket chains, spaza shops offer convenience in terms of longer trading hours, proximity of location and products in smaller quantities making them affordable to poor consumers who could not afford to purchase bulk products from supermarket chains. This convenience role is akin to the smaller convenience stores of the national chains and petrol station forecourts that have proliferated in wealthier areas. As a result, there continues to be a role for spaza shops despite the entry of supermarket chains into these peri-urban and non-urban areas. Further, and most importantly, the Inquiry has concluded that spaza shops and independent retailers are a crucial tool for the realisation of the objectives of the Competition Act. Specifically, spaza shops and independent retail operations are part of the suite of avenues available for the achievement of broader and inclusive economic participation given the lower entry barriers into these types of businesses, for example, offering the potential to build one's own business and accumulate capital rather than simply engage in salaried employment.

The ConpCom's GRSM Inquiry argued that the entry of national supermarket chains into townships and rural areas has had both negative and positive effects. From a consumer perspective, their entry has provided closer proximity to the source of weekly and monthly shopping activities and offered the range and lower pricing of larger supermarket chains. Historically consumers from township areas would have travelled greater distances to frequent these chains, incurring greater costs in terms of time and transport.

From a small and independent business perspective, the evidence is often mixed. The more convenient location of the national supermarket chains means that some convenience shopping which would have occurred at the spaza shops has now shifted to the larger retail chains, negatively affecting the spaza shops. The ConpCom's GRSM Inquiry established that, overall, there has been a decline in the number of small independent grocery retailers operating in non-urban areas following the entry of national supermarket chains. However, the shorter shopping hours, a single location on the periphery of the peri-urban areas and big box format means that these supermarket chains have not displaced all convenience shopping, especially for smaller daily top- up shopping by commuters that may leave and return outside of shopping hours or for those located further from the supermarket store.

This shift in the competitive landscape has required that local spaza shops respond by adapting their own business models and even locations within peri-urban areas in order to continue to be relevant to consumers in those areas. This adaption may include longer opening hours or a change in products stocked in order to fulfil the convenience role more appropriately. Location has also become more important. It may involve moving further from the new supermarket location, although the Inquiry also found that those spaza shops and independent retailers that are located closer to the shopping centres have sometimes benefitted from the increased foot traffic in the area.

The challenges for local spaza shops from a changed competitive environment due to large supermarket chains entering peri-urban areas are compounded by the additional challenge of new entry by foreign nationals into these same areas. The Inquiry found that local spaza shops face competition from a growing number of foreign-owned spaza shops and independent retailers that are generally perceived by consumers to be cheaper than most local-owned spaza shops. As a result, foreign-owned spaza shops often perform better in comparison to local-owned small businesses, especially in the context of the broadening footprint of national supermarket chain stores in areas where changes to business models are required.

The ConpCom's GRSM Inquiry found that there are numerous factors that are perceived to contribute to the success of foreign-owned spaza shops, based on consumer surveys, targeted engagements and public forum discussions. These factors included efficiencies in the procurement of goods from cooperative arrangements (both horizontal and vertical), greater convenience through longer trading hours, stock diversity and product packaging, but also greater price competition from trading in counterfeit goods.

The Inquiry established that foreign-owned spaza shops and independent retailers in many instances employ horizontal (operational ties) and vertical (spaza shops linked to wholesalers) co-operative strategies to compete. At a horizontal level, the Inquiry established that separate but allied retail outlets share opportunities for bulk purchasing and synergizing deliveries as well maintaining 'multiple retail outlets' under central control. From a vertical perspective, the ConpCom's GRSM Inquiry found that foreign-owned spaza shops may in some cases be linked to specific wholesalers, some of which are also foreign-owned, providing these spaza shops with the opportunity for preferential pricing. In contrast, most local-owned spaza shops and small grocery retailers are family owned and operate on a standalone basis. This approach to conducting business not only inhibits local-owned businesses from raising capital for expansion but also deprives them of the ability to realise economies of scale in respect of purchasing and transport costs.

In relation to stock diversity, product choice and packaging, the Inquiry found that foreign owned spaza shops offer customers a wider variety of products and volumes whilst local spaza shop owners admitted that their shops have less stock in comparison. This means that local-owned spaza shops are not able to fully cater to the demand from customers compared to the foreign- owned spaza shops.

The ConpCom's GRSM Inquiry found that trade in counterfeit goods confers some form of price advantage to those that engage in the sale of such goods. There are also broader negative ramifications for the fiscus in terms of lost tax revenue and the increased burden that is likely to be placed on the public healthcare sector. The ConpCom's GRSM Inquiry found that while local-owned spaza shops also traded in counterfeit products, the sale of such goods appeared to be more prevalent in foreign-owned spaza shops. This unfair competitive advantage was also confirmed by the observed trends in consumer preferences as they appear to prefer foreign-owned spaza shops due to, amongst others, lower prices.[18]

Having regard to the emerging competitive pressures, from both the national supermarket chains and foreign nationals, faced by small and independent retailers, the Inquiry noted that local spaza shops and independent retailers have struggled to adapt to these changes in competition dynamics. The Inquiry found that the challenges facing spaza shops in particular, and which are said to have contributed to their difficulty to adapt to changes in competition, include:

- an inability to tap into the economies of scale and scope in procurement offered by buyer groups and larger wholesalers due to the smaller and informal nature of these retailers, relative to even independent retail stores that make use of buyer groups, and a lack of co-operation amongst locally-owned spaza shops which prevents them from taking advantage of the opportunities for bulk buying at more competitive prices;
- an inability to tap into credit markets due to again the small and informal nature of these businesses. There is typically a lack of verifiable performance information and systems in place which result in information asymmetries with all potential providers of credit, thereby limiting the ability to ensure greater stock levels and variety to meet the convenience requirements of customers, which is reinforced by the lack of social networks of cooperation;
- the need for greater levels of professionalisation and improved business management skills in the context of more sophisticated competitors entering these areas of operation, and the need to adapt the businesses to such competition. In addition, the Inquiry found that the regulatory environment is not conducive to supporting the sustainable competitiveness of small and independent retailers, in competition to supermarket chains, and in many cases, actively undermines their ability to respond to the changing competitive environment.

*The ConpCom's GRSM Inquiry found that local authorities impose restrictive apartheid-era trading times that are at odds with the convenience role that spaza shops and independent traders are best positioned to play.*

This is especially important in the context of the entry of supermarket chains as the spaza shops need to position themselves firmly as convenience options in order to survive and thrive. It also creates an asymmetry between those shops willing to ignore the trading hours and to pay enforcement officials to ignore the lack of compliance. Such shops are able to gain an advantage in servicing consumer demand to the detriment of those that do comply, which also undermines their transition from informal to formal enterprises.

In addition, the ConpCom's GRSM Inquiry found that the regulatory processes for trading are burdensome for small traders, particularly in relation to zoning and land use. The ConpCom's GRSM Inquiry found that the cost and time constraints associated with rezoning of property, depending on the location of the land, are onerous for micro-enterprises and could have a negative impact on potential entrepreneurs. This is especially so in a context where shop owners may need to relocate in response to the entry of supermarket chains and would require new sites zoned for business use.

More generally on zoning and trading hours, submissions were made that some municipalities used these laws to push out informal traders in favour of the national supermarket chains and formal independent stores because these stores contribute to municipal taxes. However, the Inquiry notes that the informal

[18] The question of counterfeit goods is a contested debate. It should be noted that even the Competition Commission failed to effectively define what was meant by counterfeit. This has the potential to create significant harm and impact not just health, but also lives. The Competition Commission does need to differentiate and offer a more robust definition of counterfeit goods. The absence of such a definition makes the CompCom complicit in xenophobia discourse. For a debate on the terminology, see: https://health-e.org.za/2023/10/20/fake-food-in-south-africa-myths-misinformation-and-not-enough-data/

businesses also contribute to municipal development and the welfare of their residents in terms of providing economic participation for their owners and convenient shopping for their customers. In addition, these businesses can only be developed into formal tax-paying operations if they are provided with the necessary support from municipalities.

### Recommended remedial action

The ConpCom's GRSM Inquiry recommended a number of remedial actions designed to rectify the identified features that have the effect of preventing and distorting competition in the grocery retail sector and inhibiting the effective participation of South African spaza shops and independent retailers in this sector. Broadly, the required actions require a suite of interventions including (i) changes in firm behaviour in order to ameliorate the distortions in competition in relation to long-term exclusive lease agreements and buyer power; (ii) support mechanisms to bolster the sustainable competitiveness of small and independent retailers; and (iii) modernisation of the regulatory landscape in order to create a conducive environment for the optimal functioning of competition. The Inquiry recommended that as of the date of publication of this Final Report:

*Long-term exclusive lease agreements*

- National supermarket chains must, with immediate effect, cease from enforcing exclusivity provisions, or provisions that have a substantially similar effect, in their lease agreements against:
    - SMME's;
    - speciality stores; and
    - other grocery retailers (including the emerging challenger retailers) in shopping centres located in non-urban areas.
- No new leases or extensions to leases by grocery retailers may incorporate exclusivity clauses (or clauses that have substantially the same effect) or clauses that may serve to restrict the product lines, store size and location of other stores selling grocery items within the shopping centre; and
- Subject to 98.1, the enforcement of exclusivity by the national supermarket chains as against other grocery retailers must be phased out by the next extension of the lease or within five years from the date of the publication of this Final Report, whichever is earlier.

In order to continue the work of the ConpCom's GRSM Inquiry, the Commission must seek to secure voluntary compliance by the national supermarket chains within six months from the date of publication of this Final Report. If the national supermarket chains do not undertake to give effect to these recommendations, the Government should introduce legislation, in the form of a statute, regulations, or a code of practice to give effect to these recommendations.

Lastly, the above recommendations do not preclude the Commission from pursuing litigation in respect of the existing complaints and evidence gathered in this Inquiry. A final decision on a referral to the Tribunal should have regard to the response of each of the national supermarket chains to the efforts of the Commission in relation to the procurement of voluntary compliance with the above recommendations. The Inquiry is of the view that the evidence gathered in these proceedings may establish a prima facie case for a referral to the Tribunal. However, the Inquiry also accepts that litigation is a protracted process and the interests of consumers may be best served by an immediate and voluntary compliance by the national supermarket chains.

*Rental rates*

Property owners and managers of shop- ping centres must:

- use fair, transparent and commercially justifiable criteria in determining differences in rental rates across tenants;
- ensure that escalation rates across tenants are uniform unless there are fair, transparent and commercially justifiable reasons
  for them to differ; and

- ensure that lease deposits and shop fitting allowances are based on fair, transparent and commercially justifiable criteria.

In order to continue with the work done by the ConpCom's GRSM Inquiry, the Minister should appoint a facilitator to seek to secure voluntary compliance by landlords and managers of shopping centres. If the facilitator is unable to secure voluntary compliance within six months from the date of publication of this Final Report, the Government should introduce a legislative framework to give effect to these recommendations in the form of a code of good practice and the establishment of an industry Ombudsman to be financed by landlords.

*Buyer power*

Suppliers of fast-moving consumer goods must ensure -

- that trade terms are uniformly available to all retailers, wholesalers and buyer groups;
- that the trade terms offered have an objective justification based on cost savings, supply chain efficiencies, efficient risk- sharing or sales promotion. The supplier must clearly stipulate and communicate the link between the trade terms offered and the efficiencies to all retailers, wholesalers and buyer groups;
- that the available trade terms and the conditions required to qualify for those terms are clearly communicated to all retailers, wholesalers and buyer groups and applied in a fair and uniform manner;
- that the percentage value provided under each trade term to different customers is reasonably related to qualifying criteria and value provided in respect of the objective justification for the trade term; and
- that the volume purchased may not form the basis for qualification or relative percentage value offered for any trade term to the designated class of retailers or wholesalers.

In order to address the challenge faced by small suppliers in accessing the shelf space of the national supermarket chains and taking into account the recent amendments and retailer initiatives noted above, the Inquiry recommends the following actions:

- First, that the current draft regulations designating agro- processing and grocery whole-sale/retail, as well as the draft enforcement guidelines detailing specific practices as unfair be confirmed in the final regulations and guidelines. It is also re- commended that these are widely publicised in order to empower small and historically disadvantaged suppliers in negotiations with the large national retail chains. In addition, the Inquiry recommends that once the regulations and guidelines are finalised, the Commission must engage the large national retail chains on their procurement practices to ensure that their procurement practices are aligned with the final enforcement guide- lines, failing which, it should consider initiating an investigation of these firms' trading practices.
- Second, the enterprise development programmes of the national retail chains should be formalised and strengthened. Accordingly, the Inquiry recommends that the national supermarket chains commit to a formal ongoing programme to develop small and historically disadvantaged suppliers. Furthermore, that such a programme should establish binding industry targets for a proportion of turnover to be supplied by SMMEs and historically disadvantaged suppliers, as well as a proportion of turnover to be spent on the development of new SMME and historically disadvantaged suppliers. These may initially be set in line with current enterprise development spend in order to entrench such programmes. However, the formal commitments should also entail a gradual escalation of these binding commitments over time. This escalation should take into account what is realistic and achievable but should also be ambitious in its efforts to address concentration in the supply chain. Given that it is also the government department that oversees the B-BEEE codes of practice which incorporate an enterprise development component, this industry commitment may be facilitated by the DTIC.

In order to continue with the work of the ConpCom's GRSM Inquiry, the Minister should appoint a facilitator to seek to secure

voluntary compliance by suppliers of fast-moving consumer goods. If the facilitator is unable to secure voluntary compliance within six months from the date of publication of this Final Report, the Government should introduce a legislative framework to give effect to these recommendations in the form of a code of good practice and the establishment of an industry Ombudsman financed by suppliers of FMCG.

*Competitiveness support for spaza shops and small independent retailers*

Government should facilitate the establishment of distribution centres to be located in peri- and non-urban areas to service small and independent retailers and wholesalers;

Government should establish an incentive programme that will provide seed finance for innovative commercial models of private businesses that aim to offer the following support for small informal spaza shops:

- the effective incorporation of spaza shops into buyer groups and larger wholesale operations in order to assist them to realise economies of scale and scope in purchasing;
- the generation of key information on individual spaza shop operations such that the risks of extending credit finance to these shops can be more accurately assessed in order to facilitate credit access for the purchase of stock; and
- the development of consumer and business information to assist in the improvement of such businesses, including business and financial management training.

*Removal of regulatory obstacles to meeting competitive challenges*

All three spheres of government involved in the regulation of planning and trade should cooperate with one another to coordinate their activities and legislation in accordance with section 41(h)(iv) of the Constitution and coordinate their actions in terms of section 35 of the Intergovernmental Relations Framework Act, 13 of 2005 to give effect to the following recommendations:

- organised local government must seek to develop a common approach for local government in terms of section 3(3)(a) of the Local Government: Municipal Systems Act, 32 of 2000 to develop uniform guidelines for by-laws and regulations to give effect to these recommendations;
- provinces and municipalities must coordinate and streamline applications for liquor licenses with applications for the rezoning of premises;
- municipalities must review the trading times in by-laws and regulations in relation to spaza shops and street traders, with a view to amending or abolishing those by-laws and regulations in accordance with the uniform guidelines;
- municipalities must fast-track the processing of existing rezoning requests for spaza shops in township areas;
- municipalities must proactively rezone areas to enable them to carry on business in a more effective and formalised manner and in accordance with the uniform guidelines;
- municipalities must develop and implement preferred zoning processes and practices that facilitate ease of entry for SMMEs in non- urban areas including imposing conditions on the approval of shopping centre developments to secure the inclusion of SMME businesses in and around shop- ping centres; and
- municipalities must develop and implement a simplified framework for the registration of informal businesses, particularly spaza shops.

In so far as counterfeit goods are concerned, it is recommended that-

- law enforcement officers appointed by municipalities are given powers to enforce the Counterfeit Goods Act, 37 of 1997 either under section 22 of that Act or by way of declaration in terms of section 334(1) of the Criminal Procedure Act, 51 of 1977; and
- there must be increased co- ordination between the South African Revenue Services, South African Police Services and municipalities to facilitate proactive policing of counterfeit goods.

Given the multiplicity of issues that appear to distort and impede competition in the South African grocery retail sector, the Inquiry recommends that government should develop a legislative framework with a statutory industry body for the regulation of the retail sector in South Africa, taking into account, among others, the findings and recommendations of this Inquiry.

### 6.6.1. Formal food economy

In 2003 Weatherspoon and Reardon pointed out that;

> The rise of supermarkets in Africa since the mid-1990s is transforming the food retail sector. Supermarkets have spread fast in Southern and Eastern Africa, already proliferating beyond middle-class big-city markets into smaller towns and poorer areas.
>
> (Weatherspoon and Reardon, 2003: 333)

Speaking in 2003 the same authors continue to point out that;

> There has been a rapid transformation of the African food retail sector over the past decade, with a very decided acceleration – take-off – in the past 3-4 years [since 1998], the latter due to the rapid rise in supermarkets. These retail formats are displacing more traditional retailers such as small shops and public markets. The fastest transformation is occurring in South Africa and Kenya, also among the larger and relatively richer and more urbanised markets, as is predictable.
>
> (Weatherspoon and Reardon, 2003: 335)

This categorisation of South Africa being part of the first wave of supermarketisation reflects the reality that requires some further enquiry. The first supermarket in South Africa was launched in the late 1960s in South Africa.

The two leading supermarket chains in South Africa reflect some of the earlier origins of the development of these stores. This is useful because both originated in Cape Town, Pick n Pay (PnP) started by the Ackerman family in the later part of the 1960s and Shoprite/Checkers (Shoprite) started as a collection of family stores in the Northern suburbs of Cape Town and still have their head office in Brackenfell. In their 2003 article Weatherspoon and Reardon offer further detail of these stores and their origins, as reported in 2003. This is detailed in Box 2 for information only.

| |
|---|
| Shoprite is South Africa's (and therefore Africa's) largest food retailer. It started with 8 stores in 1979, with a turnover of 10 million rand. Today it has a turnover of R22 billion (US$2.6 billion as of January 2003) and serves more than 39 million customers per month. Besides its furniture stores, house & home stores, financial services, and 41 fast- food outlets (Hungry Lion), it has 294 Shoprite supermarkets (targeting the mass market, lower-middle- and middle-class consumers) and 79 Checkers Supermarkets and 19 Checkers Hypermarkets (targeting upper-middle-class and upper-class consumers) (Shoprite, 2002). |

Box 2: Detail on the origins of Shoprite stores in South Africa (Source: Weatherspoon and Reardon, 2003)

According to Pick n Pay, "Pick n Pay was established in 1967 by Raymond Ackerman. It is a company which is listed on the South African Stock Exchange. Pick n Pay has approximately 1 000 stores country-wide, which are both corporate owned and franchised stores. It employs over 50 000 employees in its corporate stores and operations throughout South Africa. Pick n Pay stores have a number of formats including hypermarkets, supermarkets, convenience stores and more recently, Pick n Pay Express Franchise stores in collaboration with BP Southern Africa. Pick n Pay was at one stage the largest retail grocer in South Africa, but is currently the second largest retail grocer in the country behind Shoprite Checkers" (Nortons, 2016: 5).

The above detail on the Competition Commission enquiry findings prompted detailed submissions which offered useful insight into the nature of the South African formal supermarket system. These are presented here as they serve as a backdrop to the later discussion on the formal food economy in Cape Town.

The formal retail grocery sector is differentiated by store size, by the range and quality of products which are offered, by the store opening and closing hours and whether the stores cater predominantly for convenience shopping (i.e. at forecourt grocery stores) or for more mainstream shopping outings. In addition, the formal retail trade tends to have formal lease agreements in place with shopping centre owners or other outlet owners (Nortons, 2016). This breakdown and spread across income categories is detailed in Figure 55

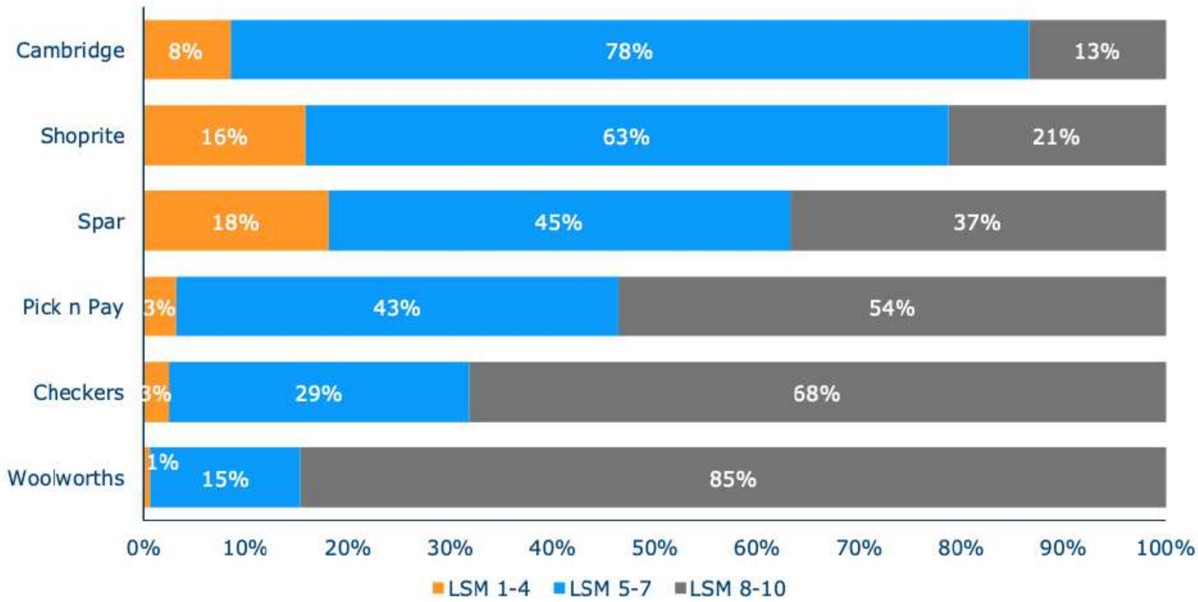



Figure 55: Breakdown of store formats and the split in targeted income categories (LSMs) per supermarket chain (Source: Nortons, 2016: 9).

When viewing this differentiation slightly differently, the growth of the different store formats and that of the different supermarket chains also offers interesting insights as to their market position, but also the revenues earned. This is detailed in Figure 56.

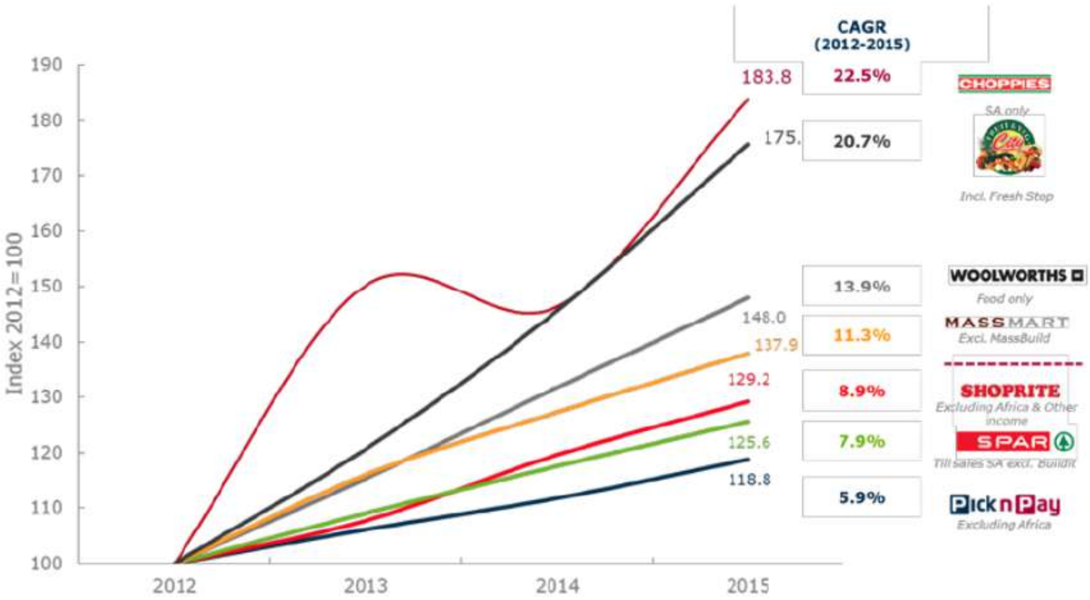



Figure 56: Supermarket chain sales revenue growth 2012 - 2015 (Source Nortons, 2016; 13)

This growth in revenue reflects a fundamental change in the South African food retail landscape and while the percentage growth of some of the new entrants, such as Choppies, was significant this is off a low base. The larger five retailers, Shoprite, Pick n Pay, Spar, Massmart and Woolworths hold a significant market share and so while percentage growth offers interesting insights, particularly how some chains are growing faster than others, the revenues earned offers a greater sense of the scale and nature of this significant economic sector in South Africa. This is detailed in Figure 57, capturing the financial year data from 2013 - 2015.

| Company reported Turnover (Financial year) | | | | Comparable sales period (Jan'14 –Dec'14) | |
|---|---|---|---|---|---|
| **Pick n Pay** | **FY13** (Mar12-Feb13) | **FY14** (Mar13-Feb14) | **FY15** (Mar14-Feb15) | | |
| Pick n Pay Group | R59.3bn | R63.1bn | R66.9bn | | |
| **Pick n Pay Excl. Africa** | R56.7bn | **R60.4bn** | **R63.9bn** | (10/12)*FY'14 +(2/12)* FY15 | **R61bn** |
| **Shoprite** | **FY13** (Jul12-Jun13) | **FY14** (Jul13-Jun14) | **FY15** (Jul14-Jun15) | | |
| Shoprite Group | R92.5bn | R101.2bn | R113.7bn | | |
| **Shoprite Excl. Africa** | R70.7bn | **R76.9bn** | **R83.3bn** | H2 FY'14 +H1 FY15 | **R83bn** |
| **Spar** | **FY13** (Oct12-Sep13) | **FY14** (Oct13-Sep14) | **FY15** (Oct14-Sep15) | | |
| Spar Wholesale excl. Ireland | R47.4bn | R51.7bn | R56.4bn | | |
| Spar Till sales excl. Ireland & BuildIt | R50.2bn | **R53.9bn** | **R57.5** | (9/12)*FY'14 +(3/12)* FY15 | **R55bn** |
| **Woolworths** | **FY13** (Jul12-Jun13) | **FY14** (Jul13-Jun14) | **FY15** (Jul14-Jun15) | | |
| Woolworths Food | R17.4bn | R19.7bn | R22.4bn | H2 FY'14 +H1 FY15 | **R21bn** |
| | | | | **Top 4 retailer sales** | **R 220bn** |

Figure 57: Reported Grocery Retail Sales per leading retail stores with sales converted to comparable period (Source: Nortons, 2016: 20)

It is worth pausing to reflect on why South Africa, and by virtue the initial development of stores in Cape Town, was seen as an early adopter of the supermarket model and why expansion took place at the rate that it did in the South African context. Across Africa authors such as Reardon, Jayne, Weatherspoon and others list one of the key drivers of supermarket expansion being foreign direct investment (FDI). Often this is assumed to be the case in South Africa. However, this is not the case. This may have been the case since the 2000s, specifically with the Massmart purchase of certain stores, but the foundational processes that lead to the early development of and expansion of supermarkets in South Africa has a direct link to Apartheid and the trade embargoes placed on global finance prohibiting them from investing in South Africa, and prohibiting from capital earned in South Africa circulating into global capital flows.

Mark Swilling in his review of the riots and unrest that took place in 2021 in KwaZulu Natal and Gauteng he made the somewhat tongue in cheek comment that "If we [as South Africans} have one thing in common, it is the fact that we are all "mall rats" now. Sure, the few spend a lot, while the rest wish they could spend something. But what we all need can now be found at the local mall." (Swilling, 2021). This somewhat sarcastic comment has a long history.

Battersby (2017) has pointed out that in 1992 less than 10% of all food was sold via the large supermarket chains in South Africa, 10 years later, 60% of our food was supplied via the supermarkets. and by 2010, 68% of all food was sold via the supermarkets (the highest in the world) and by 2017 75% of all groceries were sold via the supermarkets – the rest was distributed via the informal sector. However, without "mallification" this would not have been possible (Battersby ,2017). Retail space in 1970 was only 207,000m$^2$. By 2002 it was more than five million square metres, and by 2010 a staggering 18.5 million square metres of retail space had been constructed (Battersby, 2017). The proliferation of shopping centres after 1994 resulted in 1,053 by 2007, and then nearly doubling to 1,942 by 2015 (Battersby, 2017).Despite the low numbers in the period prior to democratic transition, it is in this period where the dual foundations of mall development and supermarket expansion was seeded.

During apartheid trade embargoes meant that capital generated in South Africa had little place to go. While this undoubtedly led to business having positive impacts and was an active driver that encouraged South African white business leaders to call on the apartheid state to accelerate transformation to democracy, the cash in the system had no place to go. Insurance and banking systems needed their cash to generate interest and needed appreciation. One way to do this was to invest in real estate, and specifically shopping malls. As an example, in Johannesburg, one of the largest malls was Sandton City. Sandton City is a large shopping centre situated in Sandton, Johannesburg, South Africa. It was built and owned by property development company Rapp and Maister, in partnership with brothers Hilliard and Eli Leibowitz, and was later taken over by Liberty Life (now part of Liberty Holdings Limited).

Convenience was a key tool to shift the retail patterns of middle class South Africans, to attract them to shopping malls through a number of key anchor tenants. Supermarkets were such a tenant. As such, the proliferation of malls served as a trojan horse driving the proliferation of supermarkets and the expansion of these.

In Cape Town, supermarket expansion has coincided with rapid urbanization and food insecurity. In this context, retail modernization has become a powerful market-driven process impacting food access for the poor. The introduction of formal food retail formats is viewed simultaneously as a driver of food accessibility and as a detriment to informal food economies established in lower income neighbourhoods (Peyton et al, 2015).

Studies done on food deserts have consistently emphasized the correlation between poverty, hunger, and food access. Often expressed through the lens of social exclusion, poverty is understood as a 'process of marginalization and deprivation' (Laderchi, Saith, & Stewart, 2003) that excludes people from the socially defined communities in which they live. This means that people who are impoverished not only lack the financial materials necessary for an adequate, comfortable lifestyle, but lack access to the basic social interactions and exchanges which ground them in a community. An approach to understanding poverty should therefore recognize the systemic linkages which reinforce spatially defined patterns of access. The traditional focus on individual households is, while effective for quantifying insecurity, limiting in its reductionism and inflexibility. A large number of definitions for food deserts exist. One definition utilized by the United States Department of Agriculture sees them as 'low-income census tract[s] where either a substantial number or share of residents has low access to a supermarket or large grocery store (ver Ploeg et al., 2009).

In their study of the supermarket expansion in Cape Town, Peyton et al (2015: 41) found that

> the distribution of supermarkets was compared with average annual household income to determine whether a relationship exists between the two variables. The number of supermarkets per square kilometre and also per 1000 households was calculated per income category. The income categories were: R1,454.62 to R43,197.89, R43,261.85 to R78,504.71, R78,521.88 to R122,188.25, R122,418.13 to R188,895.03, and R188,914.92 to R350,711.77, listed from 1 to 5 ascending in value.

The Peyton study found that the distribution of supermarkets followed uneven spatial patterns throughout the city (Peyton, 2015). The Peyton study found that the majority of supermarkets were located in the southern suburbs, northern suburbs, City Bowl, and Atlantic Seaboard, the wealthier areas of the City (Peyton et al, 2015). Those areas with fewer supermarkets are in the poorer Cape Flats townships as well as the spectrum of low-density rural to peri-urban landscapes f(Peyton et al, 2015)

The Peyton study found that "supermarkets were most common in middle-class neighbourhoods, with income group 4 having .338 supermarkets per square kilometre. This value declined in income group 5 to a rate of .164 supermarkets per kilometre. However, it is the lower three income groups, and particularly group 1, encompassing the lowest income range that faces the lowest ratios of supermarkets per square kilometre. Income group 1 contained .021 supermarkets per kilometre, followed by a rate of .096 supermarkets per kilometre" (Peyton et al, 2015: 41). This representation is detailed in Figure 58.

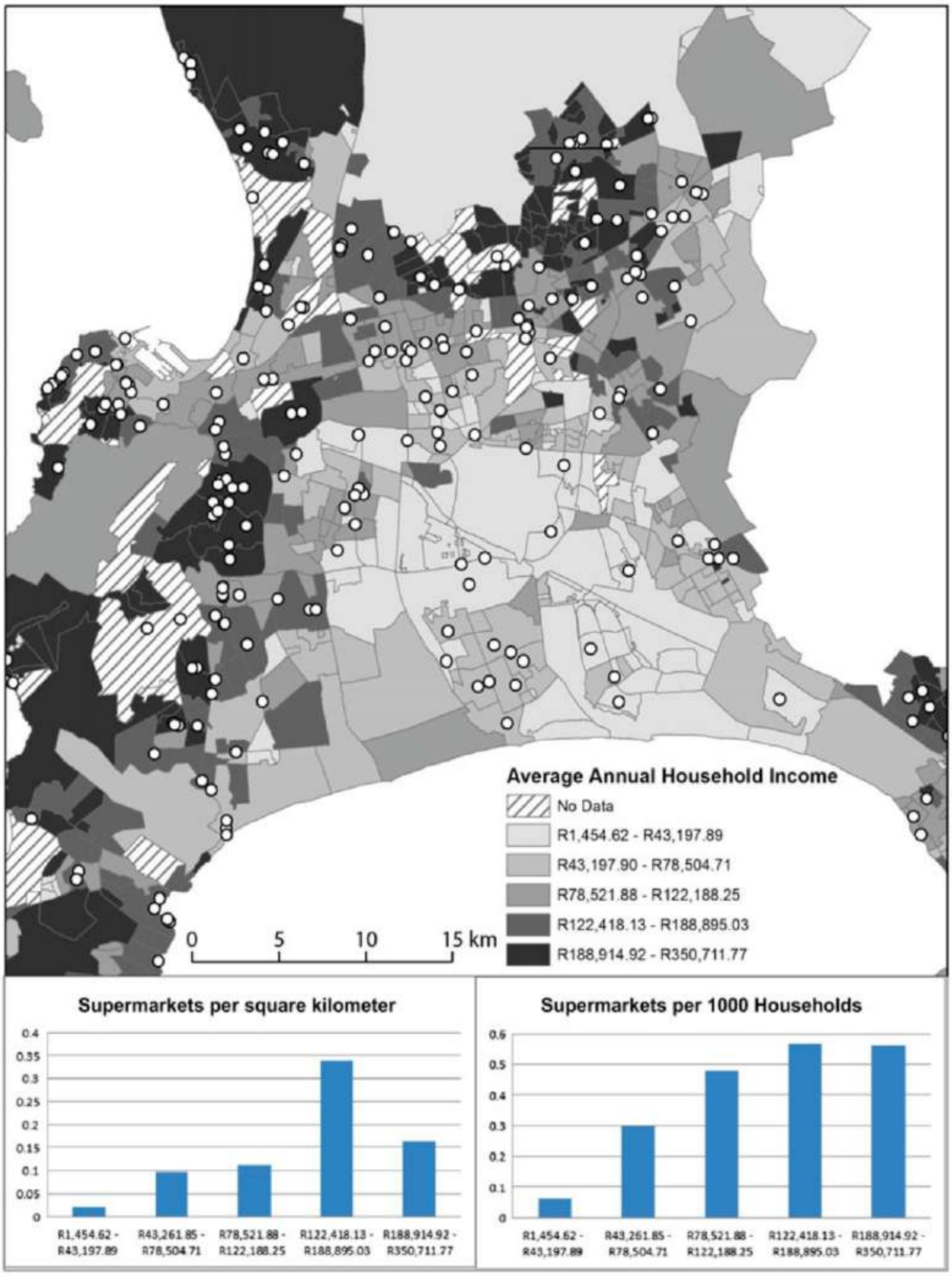



Figure 58: Supermarket distribution in Cape Town: Map of supermarket locations (points) in relation to average annual household income (choropleth map), with corresponding graphs representing density measurements of supermarkets by area and number of households. (Source: Peyton et al, 2015: 42 with cartography by Peyton, data from South African 2001 census)

Importantly what the Peyton et al (2015) study found was that despite claims and a general discourse, per the food desserts framing, that neighbourhoods without access to supermarkets represented food deserts, where corner stores and related outlets served obesogenic food, this was countered by the evidence noted. In the case of Cape Town's food system, Peyton et al (2015) found that not only did supermarkets offer less healthy and nutritious foods in the poorer areas, their prices were also higher than the local informal shops, or spaza shops (Peyton et al, 2015) (Figure 59). The point made is that "In the African context, the food deserts concept requires a much more sophisticated understanding of overlapping market and non-market food sources, of the nature and dynamism of the informal food economy, of the inter-household differences that lead to different experiences of food insecurity and of the Africa-specific conditions that lead to compromised diets, undernutrition and social exclusion" (Battersby and Crush, 2014: 143).

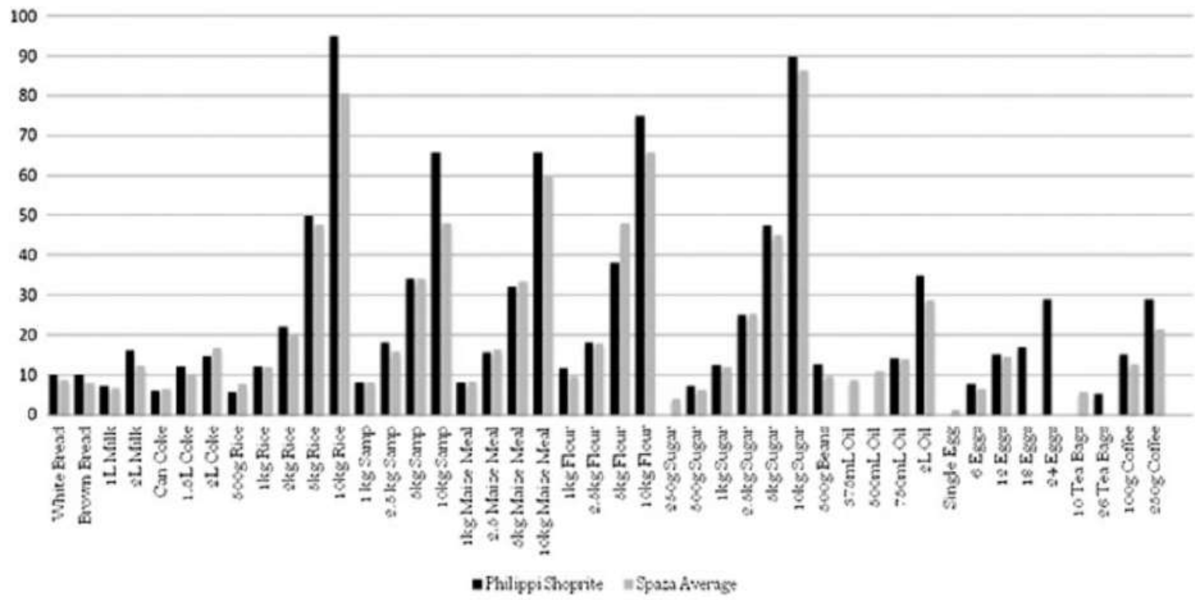



Figure 59: Difference in pricing of key foods comparing spaza shops and supermarket prices in Philippi, Cape Town (Source: Peyton et al, 2015)

It is also necessary to engage the expansion of supermarkets in Cape Town in order to document that pace and scale, but also the location of this expansion. As per the detail provided in the Peyton et al (2015) article, much of the expansion has taken place in the wealthier neighbourhoods in Cape Town. This is detailed in Figure 60. The implications of this expansion for the informal sector in Cape Town is significant. Not only does the informal sector offer a key site of food access for most poor Capetonians, it is also a site through which affordable, nutritional foods are accessed.

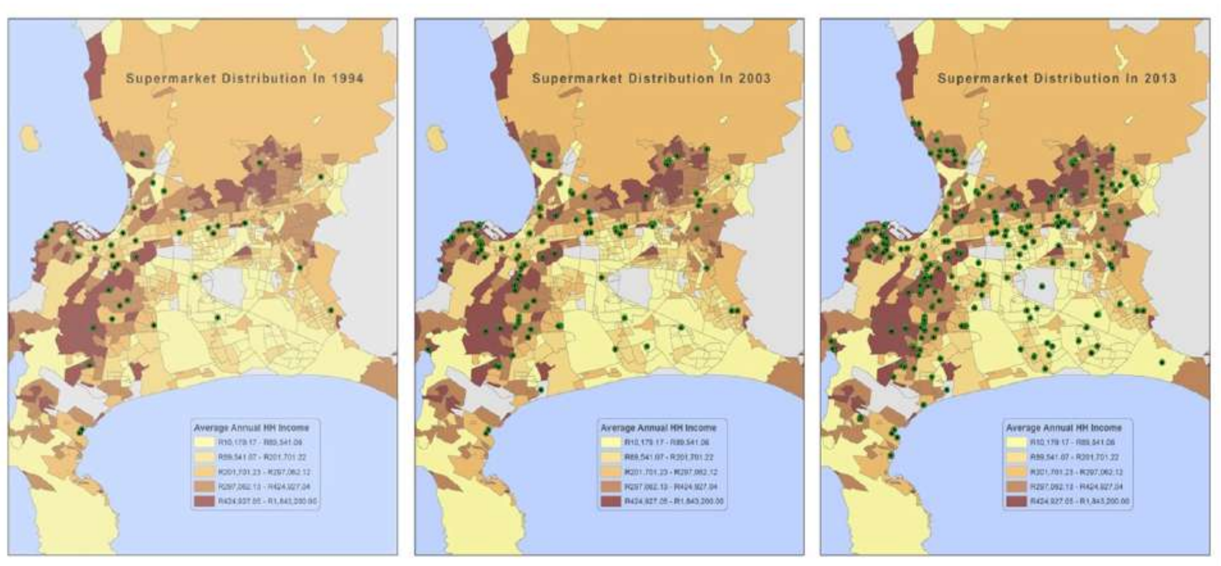



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Figure 60: Supermarket expansion in Cape Town 1994, 2003, 2013 - Detailed showing supermarkets as green dots overlaid on Census 2011 map where darker areas are wealthier areas (Source: From Battersby, 2014)

The next section will offer detail on the scale and nature of the informal food economy and the role that this plays as a source of food access for many in Cape Town.

Local produce on sale at the Oranjezicht Market
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

## 6.6.2. Informal food economy

The informal food sector also represents an "urban laboratory" for examining whether and how inclusive growth strategies can have a positive impact in encouraging entrepreneurship, raising incomes, alleviating poverty, and mitigating the crisis of food insecurity. Fast-growing cities in Africa, Asia, Latin America, and the Caribbean are characterized by expanding degrees of informality. The definition of informality and the informal economy has been a source of debate since the 1970s. Broadly understood, informality has become the defining feature of the landscape, politics, and economy of the contemporary city in the South. As a result, efforts to secure livelihoods depend heavily on informalized activity. The Organization for Economic Cooperation and Development (OECD) has noted that "it would be misleading to address food security without taking into account a large part of the economy that provides jobs, incomes and essential services for the urban population. Despite its important role, the informal economy is still poorly defined, poorly measured and consequently poorly taken into account in food security policies" (Hitimana et al, 2011: 1).

The literature on informal sector activity generally takes one of two positions. The first is a survivalist position, which suggests that unemployed individuals are pushed into the sector because they are desperate to provide for themselves and their dependents (Berner et al 2012). The corollary is that they will leave the sector as soon as formal employment opportunities are available. A second, opportunistic, position is that informal sector vendors are motivated more by choice than necessity and see opportunities for economic and social advancement in the sector (Williams and Gurtoo 2012). An inclusive growth perspective on the informal food sector asks how opportunists can maximize their outcomes and how survivalists can be supported to become more opportunistic. This perspective requires a focus on the enterprise rather than the individual and on entrepreneurship, innovation, and job creation.

National, regional, and municipal policies towards informality and informal entrepreneurship are highly variable (Young and Crush 2019). Policies towards the informal food economy span the spectrum from complete non-interventionism to draconian attempts to control and even eliminate informality (Young and Crush 2019). The pathologizing and criminalization of the informal food sector is especially common at municipal level. Regulation through various legal and policy instruments is also a pervasive response to informality. If the informal food sector is to grow and thrive, and to provide opportunities for innovation and entrepreneurship, then an enabling policy environment is essential.

Some efforts are being made to support this but the general trend is that these are overly prescriptive, attempt to formalise the informal sector as opposed to working with the specific benefits offered to consumers, particularly poor consumers, to support the informal food sector and allow it to expand, becoming a greater contributor to the current food system.

The informal economy plays a vital role in meeting many of the food security needs of low income residents in Cape Town, and other cities in the Global South. This interaction is an important aspect of the consumption strategies of the urban poor. Previous research has shown that the informal economy plays a role in providing livelihoods for the urban poor; however, it is also necessary to understand the role of the informal economy in relation to the consumer (Battersby et al, 2014).

Before explaining the role of the informal economy in more detail, it is important to discuss the duality of the 'formal' and 'informal' economies. There are common generalisations and simplifications of the informal sector which reduces the informal economy to a single element. The informal economy is a diverse sector which encompasses different contexts, business modes, products and trades (Park-Ross, 2018). By recognising the role of the informal economy in the broader urban food system, the interconnected nature of the formal and informal systems becomes clear (Battersby et al, 2016). When the informal sector is reduced simply to street trade, reinforces the conceptualisation of the formal and informal as being part of a dual economy, and implies an "illegality'" of the informal economy (SERI, 2015; Park-Ross, 2008). Furthermore, this conceptualisation disregards the complex linkages between the formal and informal economy, and reinforces the assumption that the informal economy should "formalise". This artificial conceptualisation of the informal and formal economy, ignores the historical context in which the informal economy is embedded - a context of systemic challenges and unequal access to the economy (SERI, 2015). In their work in secondary African cities, Haysom and Fuseini engage the food retail continuum, calling for far greater nuance in terms of how informality is depicted. The variations in food retail outlets across the food retail continuum are often place-specific and are diverse. Figure 61 reflects the different names given to different food retail actors across the retail continuum.

| Kitwe | Epworth | Kisumu |
|---|---|---|
| House shop | House shop | Home-based operator |
| *Ka* table | Table at intersection | Street vendor |
| Street vendor | Street vendor | |
| Mobile vendor | Mobile vendor | Mobile vendor |
| Market stand | Market stand or market stall vendor *Musika* | Market stall |
| *Kantemba* | Tuck shop | Independent kiosk |
| *Ka* shop | | |
| General dealer/shop | Grocery/general dealer | Small shop/grocery |
| Wholesaler | Wholesaler | Wholesaler |
| Mini-market/small supermarket | Superette | Mini-market/small supermarket |
| Supermarket (national chain) | Large supermarket – independent | Supermarket – local |
| Supermarket (international chain) | Large supermarket – chain store outlets | Supermarket – international |
| Butchery | Butchery/*ku* butcher | Butcher |
| Hammer mill | Grinding mill/*chigayo* | Grinding mill/*posho* mill |
| Shebeen | Bottle store (with on-site consumption) | Liquor sales outlet/bar |

Figure 61: Food retail typologies in three secondary African cities (Source: Haysom and Fuseini, 2019: 16)

Each of these different food retail typologies engage the state in different ways, but at the same time, have different governance needs (or may avoid governance if needs be), are governed differently and have very different food environment impacts and relationships ( Haysom and Fuseini, 2019).

In Cape Town, the informal economy plays a vital role in enabling access to affordable food for many low income residents (Tawodzera, 2019). Some of the most significant ways that the informal economy is able to do this, is through offering alternatives to the bulk stock that supermarkets often offer for consumers (Peyton, Moseley & Battersby, 2015). These alternatives include selling single eggs or half loaves of bread, which while being more expensive per unit, are more responsive to the needs of low income residents and households (Peyton, Moseley & Battersby, 2015). Often, in low income households, there is insufficient storage space for large bulk purchases, which results in the urban poor being compelled to make smaller purchases more frequently (Battersby, 2011). This dynamic further emphasises the systemic socio-spatial and economic inequality that exists in Cape Town, as wealthier households are not only able to purchase in bulk if necessary due to having sufficient storage space, preparation space and refrigeration facilities.

Another significant way in which the informal food economy is able to respond to the needs of the urban poor, is through the availability of credit (Battersby, 2011; Battersby et al, 2014; Peyton & Moseley, 2015). This credit plays a vital role in enabling low income residents to meet their food needs during times of the month when they have run out of money (Battersby et al, 2014; Battersby, 2011). This credit is often based on social contracts and trust based on the relationship between the informal trader and the consumer (Battersby, 2011). However, while this credit is a valuable contribution of the informal economy, this process further highlights the systemic socio-spatial and economic disparities that persist in Cape Town. Other researchers have found that vendors did not offer credit (Piper, Charman & Petersen, 2019). This research however failed to engage foreign migrant traders and the notion of no credit has been disputed and countered in a number of other studies conducted in Cape Town (Battersby, 2011; Battersby et al, 2014; Peyton, Moseley & Battersby, 2015; Haysom Crush and Caesar, 2017; Tawodzera, 2019a; Tawodzera, 2019b). Furthermore, many who rely on the informal economy are also located on the periphery of the city, far away from employment opportunities (Turok & Watson, 2001). This results in the urban poor having to spend significant amounts of their income on transport fees, leaving little money available for food (Battersby & McLachlan, 2013). The legacy of South Africa's racialized planning history continues to impact residents across various spheres of their daily lives, with access to food being one lens through which to view these impacts (Turok, Visagie & Scheba 2021).

During the Covid-19 pandemic and lockdown regulations, the role of the informal economy in providing food access to the urban poor, as well as the state's disregard of the role of the informal economy was made visible. When lockdown regulations came into effect in March 2020, informal food traders were not included in the list of approved businesses that could operate during lockdown (Battersby, 2020; Skinner. & Haysom, 2020). As a result, many people who relied on the informal economy for access to food went hungry, as well as the traders themselves who were not able to make an income (Battersby, 2020). Following a process of lobbying the state to permit informal traders to operate during lockdown, the ban was lifted and traders were able to operate; however, the impact of this regulation still lingers.

A determining factor of the informal economy and its intersection with food environment considerations in Cape Town relates specifically to the nature of lived informality in Cape Town. Social and spatial inequities in Cape Town are extreme with many living in informality on the peripheries of the city (Turok, Visagie, & Scheba, 2021).

This informality plays a significant role in the food environments of Cape Town. For residents living in areas with no access to energy or water, food choice varied greatly. In many instances, informal vendors become the stove, store room or refrigerator for these households (Haysom, Battersby & Park-Ross, 2018). The negotiations, trade-offs and compromises made when accessing food in such environments, and in the context of absent, or even partial infrastructure access poses significant questions about the framing of food environments and if the binary between retail outlet and consumer is appropriate? This question and the role of infrastructure is encapsulated in the following by Battersby et al (2023: 3):

> *Infrastructure assemblages include the material (physical and technological), as well as the political and systemic factors that 'govern' how infrastructure is developed and used. Urban food systems are made up of public and private actors, and market and governance processes that shape the cost and availability of food in different urban contexts. At the intersection of urban food systems and infrastructure assemblages lies the food and nutrition security of urban dwellers.*

These assemblages and the associated intersections between lived reality and everyday navigations of both the city and the urban food system mean that multiple systems intersect with and inform the food system. Battersby, Marshak and Mngqibisa (2016) reflect on a number of these intersecting systems, specifically transport, the relationship with formal retail and informal retail, not from a pricing perspective, but from a perspective of need - staple shelf stable goods are purchased at supermarkets but bulk broken, fresh produce is purchased daily from food vendors, informed by time, energy and incomes determinants. These food environment processes and relationships are depicted in Figure 62 and Figure 63, showing the different food retail and spatial relationships in different areas of Cape Town. Equally, the figures reflect the different food types sold by the different vendor typologies. For example, spaza shops (local permanent kiosks selling household goods that include food, toiletries, general groceries, even tools and other such essentials) through a small opening at the front of the store), are generally located within neighbourhoods. Fresh food and prepared food vendors are often located near transport interchanges and places where busy urban residents are passing on route home at the end of the day. Equally, fresh produce vendors are located outside supermarkets, meat sellers and braai vendors (barbeque, njama choma) are located in sites where foot traffic, mostly in evenings, is prevalent.

Figure 62 is a more formally built up neighbourhood but still with areas of informality and a number of residents living in more informal homes renting backyard space from formal residents. The relationships between the station and food vending and the associated food environment reflects a number of aspects that are seldom detailed in urban food literatures (Haysom, Battersby and Park-Ross, 2018). Additionally, this raises critical questions about urban design and the food environment relationships with other urban systems. Ironically in Figure 62, the city did construct a market site, but planners assumed residents travelled in formal cars along major roads and so built the market in the blank space at the label of the main arterial road. As is evident in the mapping, there are no vendors operating at this market.

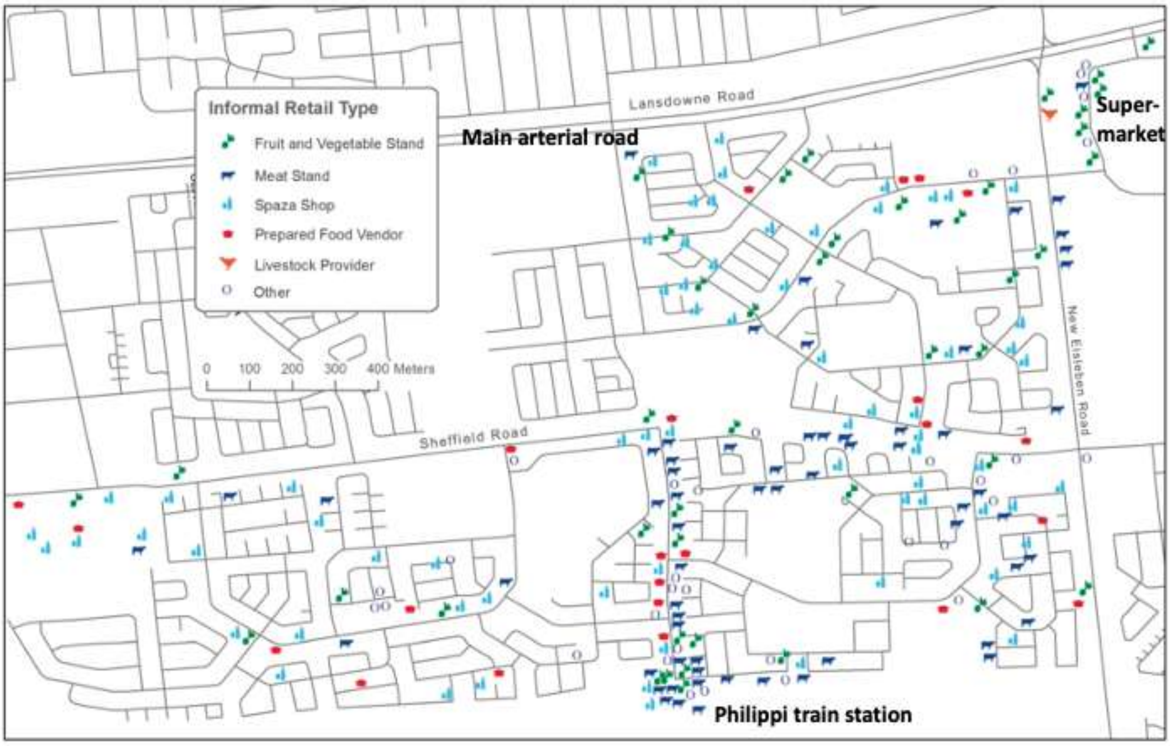


Figure 62: Neighbourhood food environments depicting food retail typologies and relationships with spatial layout of the neighbourhood (Source: Battersby, Marshak and Mngqibisa, 2016: 6)

Figure 63 is a mapping of a site on the very outskirts of the city. This area is seeing some construction of formal housing but as evident in the road layout, there are a number of areas that remain very informal, with no services, not even roads. The food environment of these areas is very different even to that depicted in Figure 62. While similar trends are observed, such as the clustering of food vendors near the entry points to the settlement, sites where public (trains and subsidised bus services) and para-public (minibus taxis) transport drop commuters, are sites of intense trade. Additionally, the location of spaza shops, peppered through the settlement is a further similarity. However, the number of spaza shops and fresh fruit and vegetable vendors is far greater in Figure 63, aligned perhaps to the far lower levels of infrastructure and the high proportion of informal dwellings in this area. These aspects pose important questions about the nature of the food environment, and even how the nutrition transition is articulated.

Further, the maps from both areas can be roughly described as the areas of Palm Peak and Hannover Park, areas depicted in Figure 60 as food deserts. Yes, there is only one supermarket (in Figure 62), but there is certainly a high volume of fresh food being sold here. As per the analysis of Peyton, Moseley and Battersby (2015), the volume of fresh produce sold in the supermarkets is negligible.

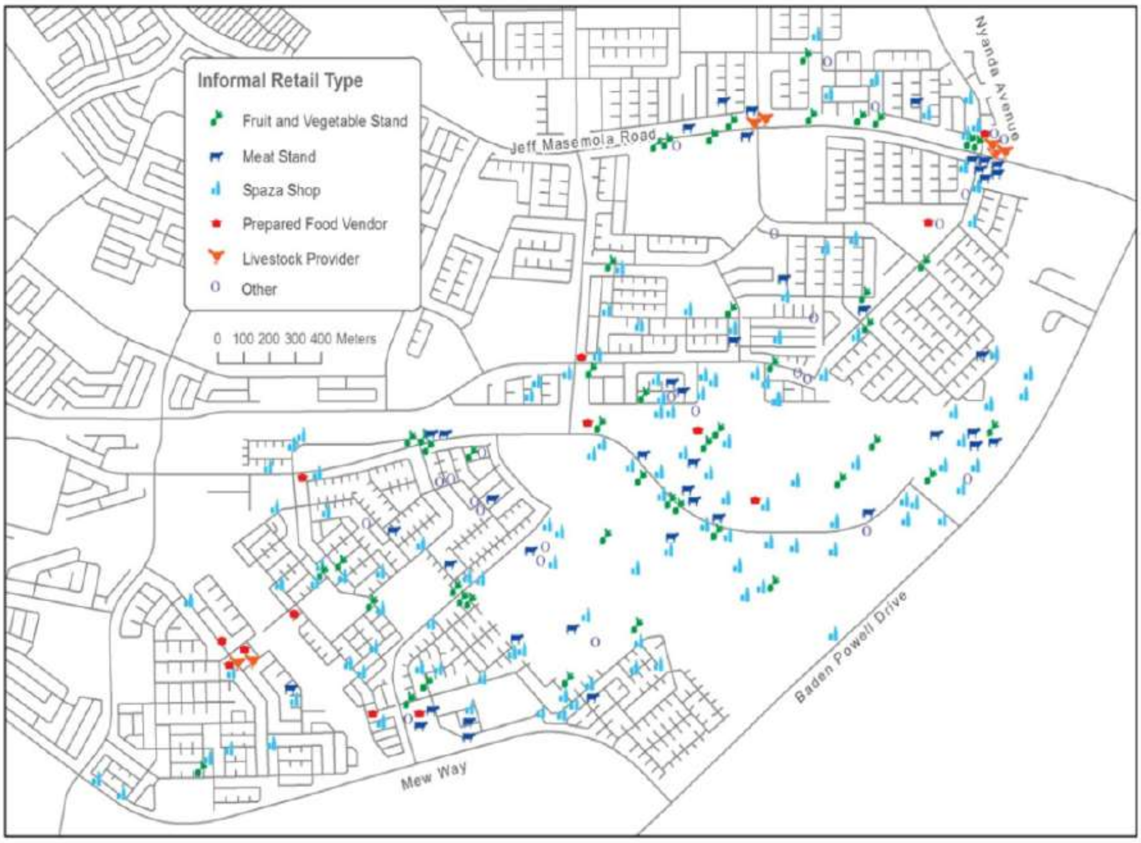


Figure 63: Distribution of Informal Food Vendors in Ward 95, Khayelitsha (Source Battersby, Marshak and Mngqibisa, 2016: 7).

These aspects all play into the issues associated with the nutrition transition in cities and asks different questions about the relationship between food environments and the wider urban environment. This has important health and development implications. These implications are even greater for vulnerable groups such as the elderly, those with HIV Aids and TB, as well as young children and infants.

In a Cape Town survey carried out by the Hungry Cities Partnership, (See: Tawodzera & Crush, 2019)[19], the motivational factors with higher means were economic and survivalist in nature: the need for money to survive (4.07), giving greater financial security to family (3.99), inability to find a job (3.16), and the need to make money to send to family (3.02) (Tawodzera & Crush, 2019). Having an unsuitable job or a job that did not pay enough were relatively unimportant, as were motivations related to a desire to provide a service, product or employment to others (all less than 2.3) (Tawodzera & Crush, 2019). Although these results suggest that most vendors are survivalists, who enter the informal food sector because they have no other choices, various entrepreneurial motivations also scored relatively highly (Tawodzera & Crush, 2019). These included having always wanted to run their own business (3.22) or wanting to be their own boss (3.13). Also, some felt that they were well-suited to the activity in terms of having the right personality (3.23), liking to learn new skills (2.92), and wanting to do something new and challenging (2.83)(Tawodzera & Crush, 2019). These results suggest that the sector comprises both survivalists and opportunists, or even that some vendors can be both at the same time.

There are diverse barriers to entry and different vendor typologies face different types of barriers. For food vendors, permitting and compliance can be a barrier. However, start-up capital is an important consideration but not always a barrier to entry. Brixiova and Kangoye (2016) argue that the amount of start-up capital is an important determinant of micro-enterprise success. Those with higher capital amounts are better able to survive and later become formal enterprises. Most of the sampled food vendors (82%) had started their vending business on their own or purchased it (Tawodzera & Crush, 2019). Only

[19] See: https://hungrycities.net/wp-content/uploads/2019/08/HCP16.pdf

18% inherited the business, suggesting that a family tradition of food vending is not particularly significant in Cape Town (Tawodzera & Crush, 2019). Only 782 of the 1,018 food vendors interviewed were able to indicate how much start-up capital they had had. Of these, just over one-third (37%) started with very limited capital of ZAR500 or less (Tawodzera & Crush, 2019). Close to two-thirds had start-up capital of ZAR2,000 or less. Only 5% of the vendors started with significant capital of more than ZAR30,000 and less than 1% started with more than ZAR100,000 (Tawodzera & Crush, 2019).

The financial barriers to entry in the informal food vending business in Cape Town were found to be low, particularly where there is no rent to be paid and only small amounts of stock are needed for start-up (Tawodzera & Crush, 2019). While the low start-up threshold makes the informal food sector an attractive proposition, it is no guarantee of success. In South Africa, a seemingly impenetrable collection of national and municipal laws, rules, and regulations applies to those operating informal businesses (Tawodzera & Crush, 2019). These are diverse and range from spaces to trade from, type of trading activity permitted in certain localities, business hours, and any other issue that the authorities deem fit to regulate (Tawodzera & Crush, 2019). In 2013, the South African government attempted to introduce new legislation making it compulsory for all businesses, both formal and informal, to obtain a licence from the relevant municipality (Rogerson 2015). The legislation was primarily targeted at unlicensed informal operators but aroused such an outcry from business and civil society that it was withdrawn for revision and has not been reintroduced.

Permitting is a critical factor in the operations of an informal vendor. IN many cities, permit access is made increasingly challenging in the drive to achieve world class city status and to "clean the streets of vendors (Skinner and Haysom, 2016). In Cape Town, informal traders are required to apply for an informal traders' permit issued by the city's Area Economic Development Branch. All unemployed South Africans are qualified to apply for this permit, while foreign nationals have to prove their legal status in order to qualify (Tawodzera & Crush, 2019). In 2018, these fees for the permits ranged from ZAR69 to ZAR1,500 per month depending on location and demand for trading spaces (City of Cape Town 2019a). In market areas classified as Category A, where economic activity is envisaged to be high, traders on hard-surface bays pay ZAR577 per month, while those on semi-enclosed structures pay ZAR718 (City of Cape Town 2019b). Mobile street traders pay ZAR104 per month, while vehicle-based vendors pay ZAR158 per month (City of Cape Town 2019b). In addition to these permit charges, traders who sell food are required to apply for a certificate of acceptability, which verifies that food is being traded from a place that meets safety and cleanliness standards. Only 5% of the surveyed food vendors had paid for any form of licence to operate their businesses, however (Tawodzera & Crush, 2019).

In terms of products offered and foods sold, the vendors in the Hungry Cities Partnership survey sold a wide variety of fresh, cooked, and processed foods. Fresh produce and processed foods were sold by the greatest number of vendors. Of the former, fruit (28%) and vegetables (23%) predominated. Of the latter, snacks or "junk food" were most common (sold by 28%), followed by sweets/chocolates (23%), and tea/coffee (21%) (Tawodzera & Crush, 2019). Maize meal and rice were the only other foods sold by more than 10% of the vendors. Fresh meat was sold by 10% and cooked meat by 9% (Tawodzera & Crush, 2019). Other cooked foods included pies, samosas, vetkoek and chicken. Just under 20% sold white and brown bread. The predominance of junk food can be explained by the fact that it is cheaper to stock and does not have to be sold immediately. Fresh fruit, on the other hand, is an every- day purchase whether the customer is at home or commuting to work. Most food vendors see fruit as a fast-moving product that brings in money regularly. Few vendors had refrigeration facilities and tended to shy away from frozen produce (Tawodzera & Crush, 2019).

Vendor sourcing is a critical consideration and vendors are highly strategic in terms of where foods are sourced, the quality of those foods and price considerations. Informal food vendors in Cape Town are integrated into supply chains and acquire their stock from a variety of sources (Tawodzera & Crush, 2019). Most of their product sources are in the formal sector, indicating that the informal and informal economies are closely integrated. Fresh produce is sourced primarily from wholesalers, supermarkets, markets, and commercial farms (Tawodzera & Crush, 2019). The primary source for fruit (42%) and vegetables (43%) is Cape Town's Fresh Produce Market, which is a major collection and distribution point for commercial farm and agribusiness produce from within and outside the city. Some of the vegetables originate from farms in the Philippi Horticultural Area (PHA) in Cape Town that sell to the Fresh Produce Market (Tawodzera & Crush, 2019). The PHA covers 3,232 hectares of land, with about 1,245 hectares under production

(Hoffmann and Harrison 2018). Theron (2016) reports that this area produces 84,000 tons of vegetables annually, or approximately 20% of Cape Town's vegetables. Over 50 different horticultural crops are produced in this area (Battersby-Lennard and Haysom 2012). Around 20% of vegetable vendors obtain their produce directly from commercial farms, probably in the PHA. Other important sources for fruit and vegetables are wholesalers and, to a lesser extent, supermarkets. Wholesalers are the major source of red meat and products (kidney, tripe, offal, liver), fish and chicken, although one-third of vendors source chicken directly from chicken farms. While supermarkets are a secondary source for red meat, chicken, and fish, many vendors source offal and fish from other informal sector producers (Tawodzera & Crush, 2019).

Most vendors selling cereal staples obtain their supplies from wholesalers, with a smaller number buying from supermarkets. Some bread retailers buy directly from factories (Tawodzera & Crush, 2019). Frozen foods and processed foods are also sourced primarily from wholesalers. Although supermarkets sell food at retail prices, which reduces profit margins for food vendors, a number of food vendors source some of their stock from supermarkets. These include meat (24%), pasta (22%), fish (19%), fruit (18%), and chicken (16%) (Tawodzera & Crush, 2019).

While some African city vendors make use of supermarkets as sources of food, this was not a discerning factor in the Cape Town Hungry Cities study. Supermarkets also tended to be used as sources by vendors when they run out of stock and have no time to restock from wholesalers or factories that are far away (Tawodzera & Crush, 2019). In some cases, supermarkets are patronized when they have promotions or sales. In general, supermarkets do not appear to be major suppliers of produce for the informal sector, as other suppliers such as wholesalers and the Fresh Produce Market are cheaper (Tawodzera & Crush, 2019). Few vendors reported sourcing their foods from small shops/retailers, primarily because their profit margins are lower. Some foods are sourced from informal suppliers, especially frozen fish (20%), fresh fish (19%), canned meat (14%), and kidney/liver/tripe/offal (12%) (Tawodzera & Crush, 2019).

Infrastructure and the wider drivers of the food environment are critical considerations for informal vendors. Most vendors surveyed (84%) said they positioned themselves to access the greatest number of customers. Because food vending thrives on "walk-in" or "walk-by" customers, their catchment area tries to capture as many customers as possible (Tawodzera & Crush, 2019). Many reported that they positioned themselves close to transport routes (45%). First, they need to be able to transport their stock easily. Second, and more important, access to transport guarantees access to customers who utilize the transport system. Optimal locations are therefore close to road and rail systems and transport interchanges where commuters switch from one form of transport to another, e.g. taxi to bus, taxi to train, train to bus, and vice-versa. One-third of the vendors said they were at their current location to access passing traffic, which would include people passing on their way to and from work. Other reasons for business location included safety (30%), cheaper rents (19%), closer to home (17%), and access to services such as water (16%) (Tawodzera & Crush, 2019).

## 6.7. Food Systems Assets

One of the key assets to Cape Town is the Cape Town Fresh Produce Market (CTFPM). The Cape Town Market is a commission fresh produce market regulated by statute. The commission is set at 12½% for all produce except potatoes, which attract a lower commission. Cape Town Market has many competitors, none of which are regulated. The Cape Town Market, or CTFPM, is one of the oldest and largest fresh produce markets in South Africa. Our market is over 50 years old and services over 5500 producers delivering fresh produce to our market agents, who in turn sell the fresh produce to over 8000 registered buyers.

Unlike many of the other municipal markets, while still a tenant on City of Cape Town land and using City infrastructure, the CTFPM commission-based market is unique and pioneering from an ownership perspective. The market operation was acquired in 2004 from the City of Cape Town, the Cape Town Market is the only privatized fresh produce market operating in the country and the first to include agents and buyers as shareholders. The market has a broad ownership base, with a 26% share of the business held by producers and market agents since 2007.

From a service and operational integrity perspective, CTFPM entered into a series of agreements with the different actors in the market and in 2010, introduced service level agreements in 2010, between a market and market agents.

The agreement is enshrined within a wider Customer Covenant which ensures service delivery and operational integrity to the principal clients, the producers who supply their fresh produce to the Cape Town Market. The produce buyers are equally important and range from large retail chains, wholesalers and food processors, to informal traders, hawkers and individuals.

### 6.7.1. Food processing firms

Food processing is an important component of the food system, with 70% of South Africa's agricultural output undergoing some form of processing or packaging (Battersby et al, 2014). Food processing is predominantly an urban activity. Cape Town is a food processing hub due in part to its port city status. Agro-processing is dominated by large companies, with the 10 largest producing 52% of all packaged food sold in South Africa. This concentration is far greater than the global average of 26% (Battersby et al, 2014). Large agro-processing businesses (annual turnover of more than R51m) account for 91% of all income and 75% of all employment in the sector. Micro-industries (less than R5m per year) account for 1.4% of all income, but 6% of all employment (Battersby et al, 2014). The Industrial Policy Action Plan #2 (IPAP2) identifies food as a sector with high employment multipliers. In line with concerns raised in the NDP, DAFF's (2012) Agro-Processing Strategy "limited participation of small and medium agro-processing enterprises in agro-food value chains" (Battersby et al, 2014).

In a review of food processing in 2014, it was noted that Cape Town had over 600 food producers licensed to sell to retailers (Battersby et al, 2014). There are around 10 000 retailers and restaurants licensed to sell food (Battersby et al, 2014). The food sector is therefore an important source of employment in the city. The major food companies have factories in the city. There are concerns about the ability of smaller producers, particularly in sectors like bread, to gain entry to the market (Battersby et al, 2014). There are distinct geographic clusters of food processing, usually centred on industrial parks. The CTFPM's presence in the Epping Industrial Estate is argued to support the presence of a range of other processors and logistics firms (Battersby et al, 2014).

The clustering around key nodes offers useful strategic planning and wider food systems support opportunities for the city. An aerial view of the Epping Industrial Estate shows how connection to key infrastructures such as rail and road were connected and aligned to the establishment of the Epping Market (today the CTFPM) which in itself served the city in terms of food access. However, in industrial sites adjacent to the market, significant other food system assists were established, such as packaging suppliers, dairies, etc. The activation of the area as a key and arguably strategic food node within the city was driven by planning approaches and a food specific planning approach adopted by the city, who at the time were the market operators.

The type of food produced reflects a substantial spice and condiment sector, which may be attributed to the City's cultural heritage. It is also attributable to the increased export market for such products (Battersby et al, 2014). The Western Cape Department of Agriculture notes that the export of spices increased by 705% between 1996 and 2007 (DoA WC 2010, 17). It is also clear that many of the businesses are producing foodstuffs that are not core products of the major producers. For example, there are few bakeries producing bread, perhaps the result of the dominance of Pioneer (Sasko, Duens), Tiger (Albany) and Premier (Blue Ribbon) in the bread market. In the Epping Industrial Estate there is a road that contains Sasko Grains, Duens Bakery, Bokomo Oats and Cadora Crumbs, all of which are Pioneer food brands (Battersby et al, 2014).

The major food producing companies play a large role in providing basic foodstuffs to residents of Cape Town, but the City of Cape Town dataset suggests that there is a vibrant food-processing sector which provides a wide variety of foods to retailers within the city and beyond (Battersby et al, 2014). The high number of licensed food producers, and the additional estimated 10 000 food retailers and restaurants indicate that the food system is a major employer in the city(Battersby et al, 2014).

From the available data it is apparent that although Cape Town has a large and varied food-processing sector, many of the core foods consumed in the City are produced by large national and multinational companies. While this may have apparent economic efficiencies, concerns have been raised about the power and agency within the food system (Battersby et al, 2014). The case of bread-price fixing in South Africa is illustrative of the problem of having a highly concentrated food production system. It is therefore pertinent to ask whether the City might have a role to play in supporting smaller producers of key basket of goods items. In particular, there is scope for the incentivisation of the production of healthier processed foods (Battersby et al, 2014).

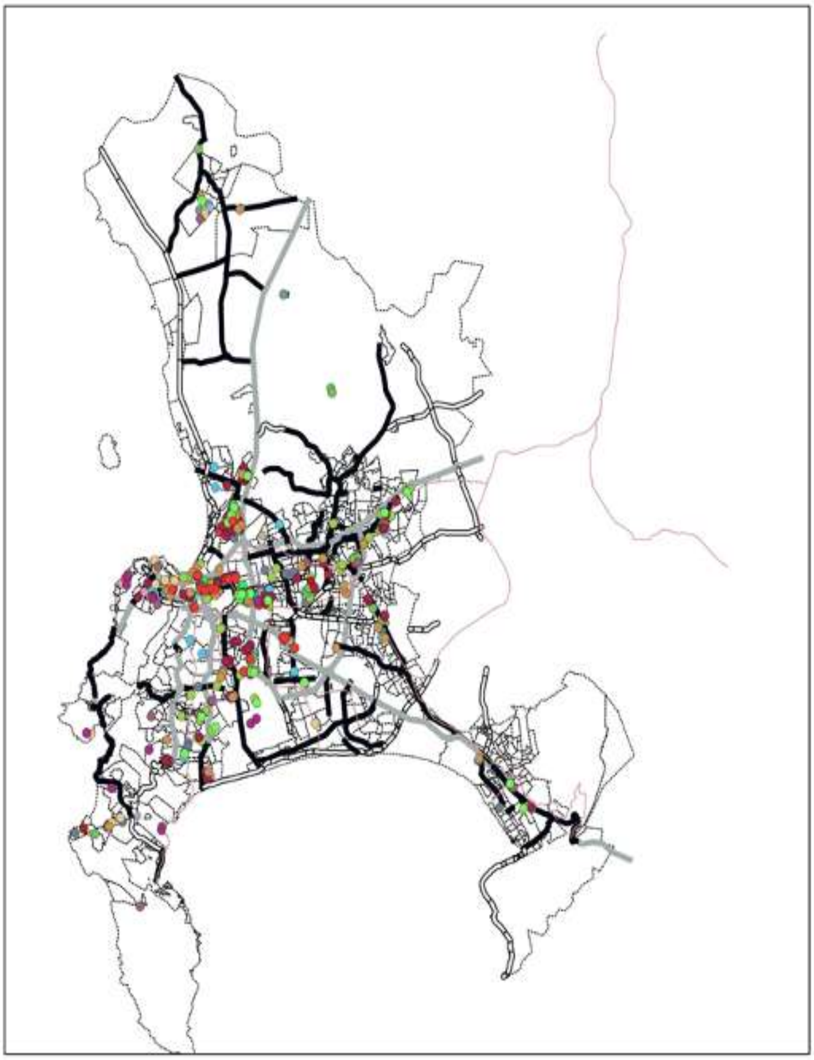

Figure 64: The location of the food producers. The food producers are clustered in a number of key nodes: Montague Gardens, Killarney, Epping Industrial, Cape Town Harbour, and to a lesser extent Industrial and Business Parks in Westlake, Brackenfell, Athlone and along the Voortrekker Road. These are areas that were created with infrastructure for these kinds of small to medium sized businesses to operate and are well connected to major road networks (Source: Battersby et al, 2014).

Local facilities - Khayelitsha (Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

"Although a principle of economic growth-enabling spatial policy is that new development is desirable and investment in development should be facilitated, land speculation goes against this principle by creating inactive areas in the urban fabric, resulting in economic decline and rising service delivery costs. Furthermore, the weight of evidence suggests that rather than being constrained by the lack of developable land, Cape Town has entered a period of spatial consolidation that is confirmed by a slowing rate of land consumption" (CCT, 2023: 99).

# 7. The state of Multi-Stakeholder food governance and processes

## 7.1. Modes and practices of food governance

In the last twenty years there has been an increased focus on the role played by local government in food systems governance. Globally, cities are attempting to develop new approaches to urban food governance with concepts such as food policy councils (FPCs) and other localized multistakeholder governance processes emerging as possible options to connect cities to their food systems (MacRae and Donahue 2013; Haysom 2015). A global trend seeks to decentralize food governance, a trend that sees urban actors attempting to reclaim control of the city food system (Ilieva 2017; Raja, Morgan, and Hall 2017; MacRae and Donahue 2013). These emerging trends are largely confined to the Global North (Haysom 2015). Urban food governance trends are varied, including processes linked to devolution of food governance that are seen as part of a wider reclaiming of the urban food space.

While simplified, current urban food governance processes can be divided into three categories: city-led food governance interventions, pluralistic governance processes, and issue-specific actions.

First, cities innovate and initiate direct food system actions such as Belo Horizonte in Brazil (Rocha and Lessa, 2009). Second, there is a broad category of efforts whereby diverse actors come together in a democratic and egalitarian manner to co-create a food governance agenda, though, for example, food policy councils (FPCs) or other multistakeholder processes. These efforts encompass pluralistic local food governance structures, seeking to engage food governance that adopt different food system governance roles at scale (per Koc and Bas 2012). Third, there are distinct issue-oriented processes whereby activities focus on a specific problem or an aligned collection of issues and champion these under the banner of urban-scale processes; in this third category, interventions fall under the mandate of a single governance actor or related urban government department, rather than the wider urban governance domain. Examples of this might include urban food growing, waste management processes, or engagement in school feeding and nutrition for early childhood centres, to name but a few.

When viewed through a more critical lens, as a result of the convening authority and the increasing importance placed on local or city governments by devolution aspirations, many donor- and INGO-funded programs target local governments as the key agents of change. Some of these nascent city-level food systems governance processes are often presented as inclusive and participatory. Yet, as Moragues-Faus (2020) points out, many urban actors, particularly the poor and those disaffected by under-performing urban food systems, are not part of these processes. As such, while the depiction of the activating and authorising environments might appear universal, it is essential that the limitations of such depictions are noted, that actors who do not fall within the specific activating environment groups or representations may be silenced, and may be occluded, and as such, may not find voice in such processes. This issue is further compounded by the fact that in a number of regions, and particularly in South Africa, many in society have been subjected to generations of food system exclusion, through both land access and food system access more broadly. This inter-generational marginalisation has in some instances resulted in a form of slow violence (per Nixon, 2011), where current food system related issues, such as stunting or diet related non communicable diseases are embodied and carried by the poor, where food system challenges are internalised, constitute shame, are accretive and suffered in private (Haysom, 2020). Additionally, these processes have further normalised hunger (Devereux et al, 2022). This has depoliticised failures in the food system. These processes also mean that the marginalised, those peripheralized by the food system don't act as the issue is seen as being of their making, their fault, or that attempting to correct this is seen as fruitless (Cabal and Devereux, 2022).

What then does this mean for multi-stakeholder processes in Cape Town? This review considers a number of emerging multi-stakeholder processes that have either been present in Cape Town for some time, or that emerged as a result of divergent related processes, or emerged out of necessity – in this case as a result of the COVID-19 pandemic. The review documents these, with the addition of one other, from Stellenbosch, the neighbouring municipality, to engage in a discussion on the diversity of such processes, but also, to build out the notion of the three modes of governance.

## 7.2. Cape Town and environs multi-stakeholder governance processes

In this next section we discuss five multi-stakeholder processes; the Centre of Excellence in Food Security Community of Practice (CoP), the City of Cape Town Food Systems Working Group (CTFSWG), and the Economic Development Partnerships Food Forum (FF). In addition to this we also discuss the Provincial Government of the Western Cape Food Systems Working Group (FSWG) and reflect on an earlier attempt at multi-stakeholder governance from Stellenbosch, the Stellenbosch Food Systems Strategy (SFSS).

These processes are detailed here as these reflect the dominant governance engagements within the food system of Cape Town. However, it is important to acknowledge that these are not the only processes taking place in the City. There are other stakeholder processes focusing on specific issues and needs. These processes take the form of interest group processes. Here groups are convened and engage in the interests of a diversity of groups. These groupings include informal traders, migrant business networks, environmental groups, water user groups, business networks and associations. In addition to these groups operating across scales in the city, there are also neighbourhood and context specific groupings such as neighbourhood networks, property owner associations, context relevant faith based groups and many others. These are all groups that have legitimacy to speak into the wider multi-stakeholder processes. However their collective voice in the multi-stakeholder processes are often limited to their context or constituency. For this reason, while the international literature refers to multi-stakeholder platforms or multi-stakeholder governance groups, in this paper we prefer to avoid using stakeholder and rather use the term actor. As such, through the remainder of this paper we will refer to these groups as multi-actor governance groups. The use of the term multi-actor governance groups  is also deliberate as it acknowledges that not all participants in these groupings can be deemed stakeholders as they may not hold the legitimate mandate to speak on behalf of certain groups or bodies, but also, they may represent an area but other voices from such areas are at times either absent, or have chosen not to speak, for diverse reasons outside the scope of this paper. The term multi-actor governance groups is deemed more appropriate to our context.

In addition to the multi-actor governance processes there is another level of engagement taking place. This takes the form of dialogues or conversations. While one such process, the Western Cape Community of Practice (WCCoP) forms part of a process that actively assumes agency to drive change in the system (see below), other conversations seek to share knowledge, encourage uncomfortable conversations and bring diverse food systems actors together. Two such processes will be discussed here, the Food Dialogues, which will change name to the Food Indaba in 2024, and the FACT Dialogues. These are by no means the only conversations taking place but are two processes that take place regularly, that are seeking to bring diverse actors together, and specifically discuss the challenges in the Cape Town food system.

### 7.2.1. Cape Town localised food governance

Traditionally governance of food and nutrition systems in Cape Town has in general been assumed to be the mandate of national and provincial government spheres, or given the absent governance on the part of local government, apart from some minor project interventions, delegated to the private sector.

However, as food systems issues have escalated, as specific crises have highlighted the extent of food systems challenges, but also highlighted the need for responses beyond crisis response, and at the same time, demonstrated the need for more systemic engagement, different multi-actor processes have developed.

Such processes are not fixed, their focus is not always clearly delineated. These processes evolve in response to energies to convene around a specific or food system struggle and as a result, energies are seldom uniform or consistent but move with the perceived, or actual, extent of the food system struggle engaged.

## 7.2.2. Integration of food into Cape Town food systems governance.

In the early 2000s, city officials, after engagements with the Toronto Food Policy Council staff, and on realising a local need, began the internal city-level development of an Urban Agriculture Policy. After a number of internal processes, the policy was adopted in 2007 (CCT, 2007). The impetus for the development of this policy was threefold. The first reason was to provide a legislative framework in which various grower groups could gain a measure of policy protection. Second, the policy formed part of an economic development strategy aimed at capacitating small-scale producers, and, third, to channel social and agricultural development services through a mandated city department. This formed the foundation of a collection of processes, led by the Urban Agriculture Unit, through engagement with some growing groups and urban food system researchers that precipitated an important change in food system engagement at the urban scale. Processes evolved slowly, despite at times openly hostile views of urban food governance from certain politicians (See Olver 2019). However, given the location of this work, within the economic development cluster in the City, and coupled with limited funding and a need to avoid "mandate creep" – a process where energies around a specific focus encroach into areas mandated to other city departments, departments not yet ready to engage food system issues, work remained confined within certain programmatic and project silos.

The City's limited, albeit pragmatic, focus meant that there was a need to both expand the urban food system governance, conceptualisation, problem identification and widen the conversations and approaches to urban food in Cape Town. This challenge presented fertile ground for the establishment of a multi-actor platform to hold these conversations.

### Centre of Excellence in Food Security Community of Practice (CoP)

The Western Cape Food Systems Community of Practice (CoP) was established in . The CoP carried the Western Cape denomination for a variety of reasons. At the time there was some hostility to urban food governance within the City of Cape Town (See Olver, 2019 for further detail). There was a need to engage across city and provincial domains. This was due to the fact that many actors still saw production as the key need in a food system. The wider peri-urban and rural domain of Province provided this space. Finally, speaking at the provincial scale enabled conversations between a far wider collection of officials, but also food system actors across the region.

A Community of Practice is a group of people who share a common interest or concern and who deepen their knowledge and expertise in this area by interacting on an ongoing basis (Wenger et al., 2002). The concept of a WCCoP involves a collective of competing "experts" and the organizations and institutions through which they bring their knowledge and experience into the deliberative spaces that constitute the CoP while also providing a space for "jostling publics" (Nowotny, 2003). The Western Cape Food Systems CoP is precisely that: a group that seeks to bring diverse voices and political views into a space that enables collective conversation, discourse, dialogue, and debate.

The diversity of officials was particularly strategic as officials at the provincial scale had an explicit mandate to engage food related issues, while unless a secondary component of their work, City officials were constrained in such engagements. Having these diverse voices present in the WCCoP enables significant cross learning and debate. The WCCoP was convened by the Centre of Excellence in Food Security at the University of the Western Cape. As the name denotes, the CoP was structured as an open space where multiple perspectives and viewpoints about the food system, often contested and passionately defended, can be shared in a neutral space (Adelle et al, 2021a).

Consensus is not the aim of the WCCoP. Rather, the aim is to conscientize a wide variety of food system actors on the positionality, politics, and needs of other food system actors (Adelle et al, 2021b). Through the initiatives associated with the development of the Nourish to Flourish strategy, the WCCoP also deepened actors' knowledge and supported Nourish to Flourish through the commissioning of research to align with and further develop concepts that emerged over the course of the Nourish to Flourish processes(Adelle et al, 2021b). Moreover, the curation of the WCCoP enabled officials from different spheres of government, different governmental silos that intersected with food (but might not have had an explicit food mandate), to engage in a "safe space." The concept of the WCCoP meant that participants were present in their personal capacity, not representing departments (Adelle et al, 2021a). This gave the City of Cape Town and a diverse group of Provincial officials, as well as civil society actors the freedom to participate and build knowledge about regional food system processes "without working on food" (Adelle et al, 2021a; Adelle and Haywood, 2021). Inputs, conversations, and tensions that arose through the WCCoP and its processes further fed into ongoing emergent regional food and nutrition system discussions.

It is important to note that in early 2023 a detailed review of both the mandate and focus of the WCCoP was carried out. The WCCoP had served as an essential convening body at the start of COVID-19 and the facilitated dialogues, and "mussels built" during the active engagements were essential in the engagements between multiple actors strategizing to respond to food system related issues associated with COVID-19. However the move to the digital realm, as needed during COVID-19, amplified a challenge associated with the WCCoP, one known to the convenors of the WCCCoP, who had sought to remedy this, but one that required action. As a broad summary, the WCCoP realised that the focus and leadership of the WCCoP needed to devolve to the community level with active processes being instituted to ensure that these voices became part of the conversation. As a result of this, the WCCoP devolved their work and delegated convening roles, with support funding, to a community organisation, Food Agency Cape Town (FACT).

## City of Cape Town Food Systems Actions

Despite the development and formal adoption of the City of Cape Town Urban Agriculture Policy in 2007 (UAP), wider and more systemic engagement in the food system, through multiple city and civic actors was not something that emerged in Cape Town. Instead, and perhaps as a result of the UAP, the food system focus in Cape Town remained secondary and stuck within a project orientation, specifically focusing on urban agriculture projects. City officials realised that this was a limiting factor and in collaboration with the Western Cape Department of Agriculture, commissioned a City of Cape Town Food Systems Strategy[20]

In 2015, the City approved the strategy but as a result of specific local politics at the time, chose not to activate the recommendations included in the strategy (Olver, 2019).

One of the recommendations in the strategy was to develop a City of Cape Town Food Charter. As the strategy development was co-funded through the Western Cape Government, the Western Cape Government, through the WCCoP, in 2017, investigated the development of. City of Cape Town Food Charter.

## Cape Town Food Charter – "Rather not"

The imagined charter was deemed essential in two areas. The first is in descaling food system actions closer to "the people" to the local or provincial scale. In so doing, the second ideal is more profound; the enactment of food democracy with the charter used to create a roadmap for the emergence of a more just, health providing, equitable and democratic food system. This resonates with Jaquith's (2011) assertion that the "the primary role of a food charter" is to act as a guide or map towards a "better" food system. These aspirations for the charter reflect dissatisfaction with the nature and power evident in the current food system. More generally a charter is also intended to use both the process and food as a vehicle to address other, at times even more substantive, issues including transformation, land restitution and land reform,

[20] See: https://scholars.wlu.ca/cgi/viewcontent.cgi?article=1027&context=afsun

inclusion, to name but a few. These hopes and aspirations segue into the nature and form of a food charter in the region (Evan Zahav et al, 2019: 34).

> Based on the findings of the report, a number of key recommendations are made to help the City to build and maintain momentum in developing a Food System and Food Security Strategy. The key recommendations are: 1) Establish the conditions for food system governance. This should be through the development of a Food System and Food Security Working Group. This is essential if the City is to develop coherent, effective strategies to address food insecurity and to work towards a pro-poor food system. It is also essential to build collaborative partnerships with civil society, the private sector, academia and other groups. Critical elements within this first phase is a) Internal City training on food systems and food security to build a common understanding of the issue and agreement on strategic response, b) Development of a Food System and Food Security Charter that can guide the City's long term planning for food security and develop agreement with external partners, c) Development of a Food System and Food Security Strategy. This is essential, as it will prevent the responses being project-by-project and department-by-department.
>
> (Battersby *et al*. 2014: c-d).

Food charters "do not hold any formal power, but have been used as a powerful tool to instigate and legitimate longer-term food engagements" (Battersby et al. 2015: 66). However, more broadly it is important to be clear about what a charter is and how this might differ from other pluralistic governance processes, such as food policy councils or other multi actor platforms. A Charter, was originally a grant made by the sovereign either to the whole people or to a portion of them, securing to them the enjoyment of certain rights. Of the former kind is the present charter of France, which extends to the whole country; the charters which were granted to the different American colonies by the British government were charters of the latter species. A charter differs from a constitution in that the former is granted by the sovereign while the latter is established by the people themselves: both are fundamental to the law of the land… [Emphasis added]. (Bouvier's A Law Dictionary (1839:172). Considering both the term's particularly rich history locally in South Africa (e.g. Women's Charter 1954, Freedom Charter 1955 and Land Charter 1994) and globally (e.g. the landmark UN Charter 1945) and the prominence assumed by the proposed 'food charter' in several of these documents, it seems worthwhile begin by addressing this omission to ensure conceptual precision. (Evan Zahav et al, 2019: 1).

The term 'food charter' had been raised several times in debates around food in the Western Cape since a team of researchers from the University of Cape Town (UCT) highlighted its potential in a commissioned City of Cape Town report that engaged strategic options for the metro to address the complexity of the food system (Battersby et al, 2014).

There is little doubt that with the transition of society to a predominantly urban world, traditional, largely agrarian approaches to the food system are failing, not just urban consumers, but society as a whole. The urban transition, however, is embedded within a set of other, mutually reinforcing and converging transitions (Swilling and Annecke, 2012). The result is "the reconfiguration of the institutional and organisational structures and systems of society" (Swilling and Annecke, 2012: xvi). The more formal structural political economy, by its very design, is generally unable to keep pace with such transitions. Often more novel approaches to governance (and not government) are the test beds for changes in praxis. These changes range from bottom up organisation to new allegiances and politics. Reflecting critically on this, the emergence of a discourse calling for the formation of a food charter is an indicator of the frustration of many demanding change, particularly in the urban context, in society writ large and in the food system, changes that the current policy architecture is unable to address (Evan Zahav et al, 2019: 36). Here Suttner's (2005: 6) notion that a charter is a political document while a constitution is a legal one, is instructive (Evan Zahav et al, 2019: 36).

And in the instance of the Western Cape/City of Cape Town Food Charter demonstrated the active politics aligned to such processes.

The idea of a charter was raised on several occasions in facilitated dialogues known as T-Labs convened by the Southern Africa Food Lab (see Pereira et al. forthcoming). Participants of these T-Labs suggested that building a legitimate food charter "from the ground up" would provide a powerful way to guide future engagement with policy processes and guide the implementation of practical action on the ground. It was argued that this food charter should be based on the South African constitution and include issues such as land and water rights. The charter would be a means to hold government and other actors to account and would not be owned by any organisation. In essence, it was argued that a charter would ensure that the inclusion of grassroots organisations, such as themselves, in discussions and decisions about the Cape Town food system (Evan Zahav et al, 2019: 1).

However, civil society activists argued that a charter would set the terms of engagement about any discussions about food, based on agreed principles that would guide all decision-making – including how agricultural land should be used in a context where housing delivery and mall development were seen as imperatives (Evan Zahav et al, 2019: 1). This reflected the tension between a political document and a legal document where civil society saw the Charter as a counter to the existing legislative arrangements. This was not a stance that government was comfortable taking, but at the same time, demonstrated a key flaw in the emerging process. The idea of the Food Charter for the Western Cape was to enable a more democratic process, one where civic and state actors collaborated and agreed on the foundational principles of the food system of the region. However, some civics saw this as a means to hold the state accountable. Given the fractious nature of politics, with different political parties controlling budgets specific to agriculture and health, with aligned differences in authority, the state could never agree to such a position.

Subsequently, the Provincial cabinet rejected the idea of a charter, which had been included in an early draft of the Provincial Food and Nutrition Security Strategy, as it was deemed 'impractical' and unlikely to achieve the outcomes required in the Strategy's 'legacy phase'. The province wanted to be seen to be pursuing action and not principles (Evan Zahav et al, 2019: 1). What emerged were the different working groups that spoke to specific mandates and enabled a less formalised form of engagement with food systems issues. These did exclude certain food systems actors, but were critical assets during the COVID-19 crises, convening diverse actors and actively programming responses.

This reflected the challenges associated with the formation of such pluralistic structures.

## City of Cape Town Food Systems Working Group (CTFSWG)

The lack of uptake in food systems governance in Cape Town and the reluctance to actively form a food charter, work on the City's food system did not stop. In reality, the City of Cape Food Strategy sowed a useful seed to enable conversations around food and the food system in the City. It is somewhat ironic that despite the reluctance to authorise food systems related activities, the same political leadership joined a number of global city networks, many of whom included food as part of their wider remit. One, the joining of the Milan Urban Food Policy Pact, highlighted the leadership contradictions as this was explicitly a food network.

The City of Cape Town is a member of a number of international networks, including ICLEI Africa, the Milan Urban Food Policy Pact (MUFPP), 100 Resilient Cities[21] and the C40 network. Signature to these processes was led by the city mayor at the time (Olver, 2019).

Cape Town Food Systems Working Group is a multi-actor group but as opposed to some global framings of Multi Stakeholder Platforms, this is led by the City of Cape Town to support the City's work in and around the food system.

However, a central premise of this work is embedded within a Resilience approach to the food system. Cape Town's food system operates within multiple contexts that extend from the City scale to the global. Throughout the scales, it is directly and indirectly affected by resource availability, price fluctuations and trade agreements, amongst others. As an example, because South Africa is a nett importer of wheat and agriculture is largely commercial and dependent upon imported production inputs, it is vulnerable to global processes, where the conflict between Russia and the Ukraine, highlights these challenges.

[21] See: https://www.rockefellerfoundation.org/100-resilient-cities/

Households that depend upon bread and pasta for their staples are affected by resultant price increases, agriculture and logistics costs of other foods. For this reason, food insecurity increased in Cape Town with concomitant health and nutrition affects. For these reasons, it is necessary to understand the broad parameters and investigate the impacts more deeply to better anticipate food systems changes in the near, mid and long term and importantly – establish mitigation measures to lessen the impact.

The above example reflects a challenge identified by the City who then activated the working group to engage such an anticipated challenge. The food systems working group is led by the City Resilience Officer, under whom the responsibility for the Food Strategy vests within both the Resilience Strategy (specifically 1.4.1 - Establish a food systems programme to improve access to affordable and nutritious food)[22] and the Integrated Development Plan (specifically 14.3 Integrated urban health programme).[23]

While this is not a direct output from the CTFSWG, the convening processes of the different actors has meant that other city officials could better see their role in the urban food and nutrition system. The Resilience Department has actively worked to demonstrate the diversity of city officials that impact the food system, this is detailed further in the comment for the Principal Resilience Officer at the City of Cape Town.

> Instrumental to the development of the Food System Programme, the City not only carried out a food flow mapping and vulnerability analysis but also conducted a mandates audit across local, provincial and national governments to understand where it has capacity to address food security and food systems issues. Despite the missing direct food mandate, the City acknowledged that they play a significant role in the food system through spatial planning, infrastructure and the management of the informal economy.[24]

However, this mandate from key City level governance documents has enabled the convening of multiple and diverse stakeholders who actively participate in and engage the City in their ongoing engagement in food systems related activities. Partners in this process include city officials with a direct food related mandate, city officials with an aligned mandated but not a direct food responsibility (such as transport, sanitation, etc.), provincial officials from the Department of Agriculture, other policy, planning and strategy related provincial officials, academics and food and rights based civics. There are three key streams of work that align to this. These include research and knowledge systems around food and urban food and nutrition systems, anticipatory and strategic planning around urban food and related systems crises, responses to specific internal city and provincial actions that impact food and nutrition system outcomes. Effectively those present in this process reflect members of the authorising, activating and facilitating environment.

While this may not conform with the various multi-stakeholder platform work given that it was led and initiated by the City of Cape Town, it offered multiple positive aspects often ascribed to MSPs.

A key benefit of the CTFSWG is its anticipatory potential and ability to convene multiple actors and knowledge partners during times of crises. African cities are often described as being in a constant state of crises. Cape Town is no different. Crises have different temporal components and as a result, groups such as the CTFSWG are essential in engaging in response to these crises, in offering diverse and at times contentious suggestions, all offered in a "safe" and respectful mode. As an example the CTFSWG has played an active role through emergency convening processes led by the City, to engage the 2016-2019 drought, the COVID pandemic, riots and labour unrest in other parts of South Africa, taxi strikes, food distribution disruptions due to labour disputes, the Ukraine/Russia crises and even the Suez blockage. These convenings were at a time of crisis and multiple actors participated actively. As an example, at one meeting during COVID, one participant questions why food parcels were being distributed and asked if relief efforts

[22] https://resource.capetown.gov.za/documentcentre/Documents/City%20strategies%2C%20plans%20and%20frameworks/Resilience_Strategy.pdf
[23] https://resource.capetown.gov.za/documentcentre/Documents/City%20strategies%2c%20plans%20and%20frameworks/IDP_2022-2027.pdf
[24] See: https://www.fao.org/in-action/food-for-cities-programme/news/detail/ru/c/1472942/

could not be don via vouchers, thus enabling the households greater agency. This had not been done previously but offered households the opportunity to receive relief in a form that suited their own needs and lived realities.

The CTFSWG also holds more regular meetings which serve as knowledge sharing but this different from other processes where city officials are provided with a platform to share their work and thinking and test these ideas with "critical friends" before expanding on this work.

A further defining feature of the CTFSWG is that the City is playing two roles when compared to the environments depicted in Figure 2. Effectively, in the convening role that is played, the city is in fact playing the role of the facilitating environment, while other city and provincial officials retain their role as the authorising environment.

However, the key role that the CTFSWG plays is in testing thinking and alignment through different city actors, using the CTFSWG as a sounding board, refining plans and actions and then embedding these in official city processes. It is a key strategic tool of the Resilience Department, whose mandate is a resilient urban food system, in the integration of food and nutrition related strategies in the City.  In so doing, this aligns with some of the different modes of MSP, specifically those detailed by Haysom (2014) as being directly aligned to formal government structures. These structures hold as a mode of practice a participatory and open ethos, but do not claim to be fully democratic. The City of Cape Town is after all the convenor and is bound by their legal responsibilities and political dictates.

## Provincial Government of the Western Cape Food Systems Working Group (FSWG)

The Western Cape Government's draft Household Food and Nutrition Security Strategy (commonly referred to as "Nourish to Flourish"), published in 2016, was developed to address the multiple dimensions of hunger, food insecurity, and malnutrition in the region. As a strategic framework document, Nourish to Flourish aims to improve food system governance by bringing stakeholders in communities together to address interconnected issues relating to food, ensure effective coordination of State and non-State actors, leverage existing programmes to identify ways to capitalize on positive outcomes, and promote greater efficiencies and synergies for stakeholders actively supporting the reduction of food insecurity.

On a policy level, despite claims of integrated policy approaches, the reality is that South African food security governance remains deeply embedded in a production-as-solution approach, which overlooks the fact that South Africa is over 65% urbanized. This rural- and production-oriented approach to food security not only misunderstands the challenge, but it also draws fiscal resources into redundant programmes.

The Nourish to Flourish strategy represented a dramatic departure from South African food security policy and programming, calling for explicitly transversal governance approaches to address food security through food system interventions (Box 10.1). Not only was the approach within the document novel, but so was the approach to the development of the framework. The strategic framework was extensively workshopped within government and beyond, and even the terms of reference were altered as information emerged from the engagement processes and as participants responded to the developing framework approach (Durno, 2020).

The Western Cape Government Strategic Framework on Household Food and Nutrition Security (Strategic Framework) adopts a food systems approach to analysing, interpreting, and responding to the features of the wider food system that create and contribute to food insecurity.

As the name denotes, the Western Cape Household Food and Nutrition Security Strategic Framework, or Nourish to Flourish, focused on food and nutrition security in the Western Cape province of South Africa. Some background into the state of food and nutrition security in South Africa and the Western Cape is provided here to highlight the importance of such a strategy.

> The food system is intricate and characterised by interaction and interdependence with other systems such as health, social security, resources, economic opportunity, spatial planning, the state of agriculture and the environment. The operation of this dynamic system determines the availability, access, utilisation and stability of the supply of food. Therefore, by taking a proactive food systems approach, the Western Cape Government (WCG) seeks to identify and promote sustainable household food security solutions and improve the nutrition of people living in the province. (WCG, 2016, p. 1)

Through this consultation process, drawing on concepts and needs identified in the earlier stakeholder processes, initial key intervention areas were identified. These processes brought together diverse and influential stakeholders with interest in and knowledge of the regional food system. It also aimed to creatively inspire change in how the Province, as well as other food system governance spheres, could address complex challenges pertaining to food and nutrition security.

The reflection that took place as part of this process led to the formulation of six project ideas that were presented to a group of political stakeholders, who endorsed a process to take these projects to the design stage (SAFL, 2017b):

1. Securing wider consensus and political buy-in for the sale of nutritious food on informal markets
2. Early Childhood Development (ECD) support services in the Western Cape
3. Piloting a local smallholder farmer-focused agri-hub
4. The potential of school food gardens as community hubs
5. Promoting breastfeeding through workplace interventions
6. Realizing the social and economic potential of food waste in WCP

Following these processes, some of which had more success than others, it was agreed that N2F would rather refocus and take a site specific approach. This meant engaging in three key sites within the Province. The final agreed sites included Worcester in the Cape Winelands district, Langa in Cape Town and Knysna in the Southern Cape. Given the site specific nature, in order to activate these processes, wider by-in and alignment was necessary. For this reason, the Western Cape Food Systems Working Group was convened.

The FSWG was co-led by two senior provincial officials, the director of policy in the Department of the Premier, and the head of the provincial Department of Agriculture. This combined two specific mandates, strategy and food security.

Importantly, while this specific multi-actor platform is detailed here as part of the basket of food system MAPs in the region, it was a closed platform. Only government officials were invited to, and formed part of, this group. This may exclude this group from this summary of MAP actions, but it is included here for two reasons. Firstly, there is frequently a flawed assumption that there is coherence within government departments. This is frequently not the case. This is complicated further when different departments are asked to share budgets and resources, specifically personnel, to support a non-mandate process. As such, significant work needs to be done to build coherence, trust and a proactive mode of working where the different government actors see benefit for their work, and performance management assessments through collaborating, in such a process. As such, coordination across the activating environment is an essential process in all MAP processes. Secondly, and aligned, frequently officials are diligently focused on their own work and as such, often fail to see their role in such a process, particularly when their work is not food or nutrition related. Such processes make the food and nutrition system connections evident.

Importantly, when seeking to enable a robust system of actions and engagement across the beneficial "environments" per Figure 2, a lack of coherence within the authorising environment provides fertile ground for capture and the entry of the disrupting environment actors. This may be activating environment actors seeking to create special dispensations for themselves or their specific constituents (for example middle class and anti-poor interests), or it might be external actors noting the discord within the state and being opportunist and exploiting that discord for their own purposes (as private sector developers have done in the past, per Olver, 2019).

For the FSWG there was also an important structuring component that enabled different key departments to appreciate their direct role. The lens through which these conversations were enacted was the N2F strategy. N2F did influence who was expected to play a greater role in the FSWG, but this also enabled greater clarity about roles and the reasons for being present. In this instance, the priority partners that needed active relationship building were the department of health and department of social development, the spatial planning department and the department of education.

Importantly, the FSWG energies are also dictated by political priorities. As a result the officials that lead these processes play a critical role in reading the political landscape and assessing the need and risks when seeking to engage both across mandates and project foci as well as political priorities. In the case of the FSWG, this was not specific petty politics, but rather the political strategies being applied and the different areas of focus that ebbed and flowed in accordance with political processes. For example, the nutrition needs during COVID, and the links to wellness enabled a specific FSWG focus, while at the same time, built a sense of the importance of the FSWG on the part of political leadership. When priorities shift, to for example employment or crime, the immediate alignment with political imperatives is less clear. Reading of the political landscape is considered an essential part of the governance processes associated with such MAPs. This is in part detailed in Figure 65. Figure 65 charts the evolution of the Nourish to Flourish strategy, which then served as the entry point to commence with the work of the 65.

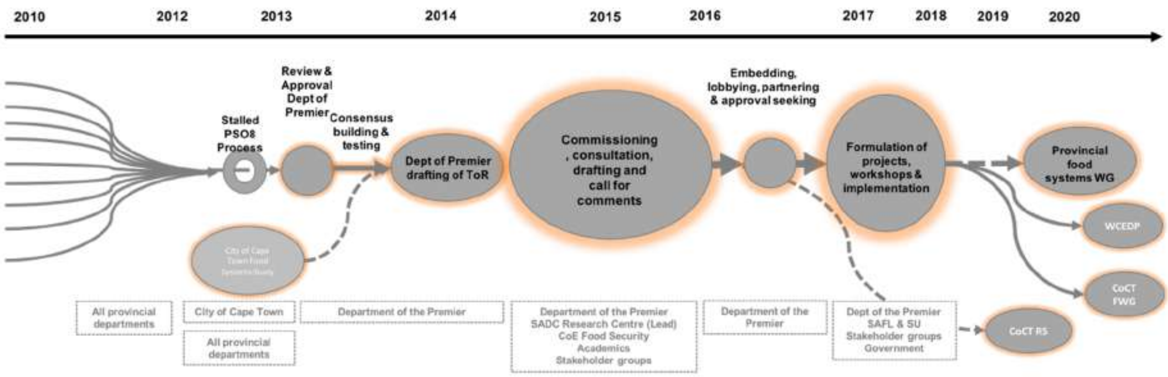


Figure 65: Evolution of the development of the Nourish to Flourish Strategy and location of the FSWG within (Source: Haysom and Battersby, 2023: 202)

The other factor that Figure 65 demonstrates is that very few MAPs emerge without a very robust history. Many different actions have come before and the MAP formation is often as a result of alignment in these preceding actions. Further, the interconnections with other processes also means that the MAP is seldom isolated and can at times be influenced by, or even influence, other processes, projects or activities.

This historicising of such processes, coupled with the alignment around a specific needs requires further reflection on the work done to activate such MAPs. Here the role of constant network building and the associated communication, concessions, engagement and compromise often all form part of the processes that proceed and continue with MAPs. While these activities might differ slightly in the context of the FSWG given that state actors also have a mandate to engage others, the network building component cannot be under-stated. For some such MAPs the network itself is the core element of the MAP.

A further feature of the FSWG was that it aligned with the CTFSWG but mandates, roles and areas of responsibility differed. However, while some actors in the CTFSWG might have been considered non-governmental actors, this was still a state led and state driven process. Absent from these two working groups were civil society and small scale disaster relief and support groups. The alignment, or overlap, between the City of Cape Town and Provincial Working groups is depicted in Figure 66. Missing from this is where these civic groups might be located in the wider MAP processes.

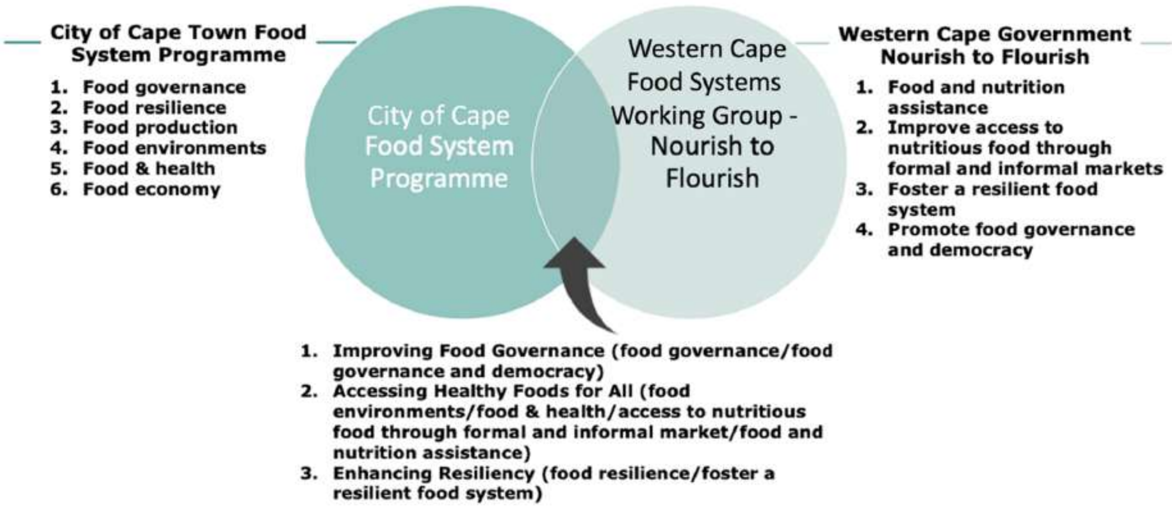


Figure 66: Alignment and differentiated roles of state led MAPs in Cape Town (Source: Adapted from WCEDP[25]

## Economic Development Partnerships Food Forum (FF)

In April 2020, the Western Cape Economic Development Partnership (EDP) facilitated the formation of the Western Cape NGO-Government Food Relief Forum, in response to the urgent need for coordinated food relief in response to the COVID-19 pandemic and lockdown imposed by the state at the time. Subsequent to lockdown, and as some were able to return to work, the social and economic consequences of COVID-19 continued to be felt. While the need for immediate food relief had abated, there was still a compelling case to be made for restructuring the food system to help address the inequities exposed during the pandemic.[26]

The impact of the Forum included foregrounding the role of civil society during the pandemic, and highlighting the vulnerability of the food system in the Western Cape prior to COVID-19. The disruptions caused by the Covid-19 crisis forced changes in assumptions, attitudes, behaviours and relationships in both civil society and government, leading to new ways of doing things.[27]

Shortly after its inception, the EDP FF conducted a rapid assessment of the Cape Town food and nutrition system through a desktop review, survey with the Forum members, and engagements with various stakeholders including the Western Cape Government and the City of Cape Town. The aim of the assessment was to:

- Understand who is doing what in the food and nutrition system,
- What the existing gaps and needs are, and
- Beyond coordinating food relief efforts, how best can the Forum bridge the gap and address the needs of the actors without duplicating efforts.

From this a food system actor map was developed. This is detailed in Figure 67.

[25] See: https://wcedp.co.za/wp-content/uploads/2020/12/Western-Cape-Food-Forum-Report-22-October-2020.pdf (Page 5)
[26] See: https://wcedp.co.za/western-cape-food-forum/
[27] See: https://wcedp.co.za/wp-content/uploads/2020/12/Western-Cape-Food-Forum-Report-22-October-2020.pdf

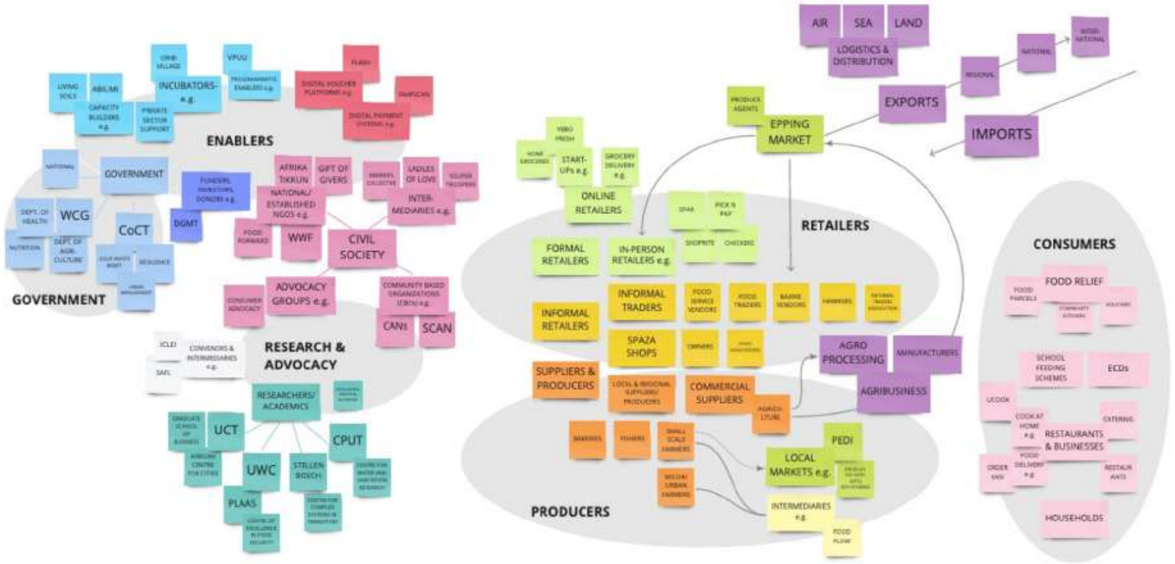


Figure 67: Western Cape Food System Actor Map (Source WC EDP)[28]

At the inception of the FF it was agreed that the FF would focus on promoting joint action and implementation between sectors by enhancing interaction, problem-framing, and solutions finding, while at the same time, bridging the gap between diverse stakeholders operating in different parts of the food and nutrition system. A further role was that of prioritizing relationships with government departments around policies, projects, and budgets. Given the urgency around food relief at the time of formation, a final objective was to continue the food relief coordination role aimed at vulnerable populations. However, there was a clear focus from the forum on seeking out ways, while continuing with food relief coordination, to transform beyond humanitarian efforts and adopt a systems view.

The proposed WC Food Forum approach included:

- Avoiding overlap and competition with existing activities and networks
- Avoiding becoming a centralised 'gatekeeper' but rather promote a 'network of networks' concept of coordination
- Continued commitment to learning, adaptation, and knowledge sharing
- Continued commitment to data sharing

In August 2021, after almost a year of FF activities, a strategy session was held to assess and agree on the next phase of the FF work. The initial brief and mandate of the FF had been the coordination of disaster relief efforts. As lockdowns were lifted and the perceived immediate need receded, alternative approaches were deemed necessary. This was also prompted by a second factor: Lockdown had meant that many food forum members were in their homes, observing lockdown regulations, or acting as essential service operators. However, as FF members returned to work, or were able to return to their homes, for international actors, the composition and ability to engage in the FF changed. At this session, the evolution of the FF was documented and used to reflect on the evolution of the FF and its forward trajectory. This is detailed in Figure 68 below:

[28] See: https://wcedp.co.za/wp-content/uploads/2020/12/Western-Cape-Food-Forum-Report-22-October-2020.pdf (Page 2)

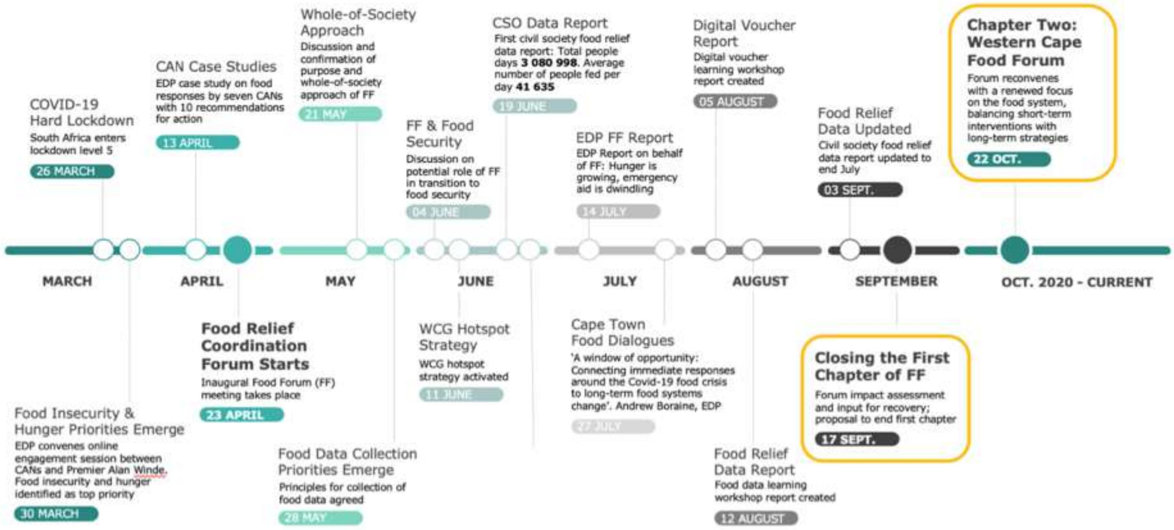


Figure 68: The evolution of the Western Cape Food Forum in phase 1, from March 2020 until September 2020 (Source WCEDP 19 August 2021)[29]

For the third phase of the FF work it was agreed that focus would be directed to local production for local consumption. This was seen as one of the ways to move from food relief to food security in the short to medium term.

The premise of this needed approach, and the associated catch phrase was that local production for local consumption meant promoting short food supply chains. It was argued that local supply chains involved fewer intermediaries, reflected an enhanced commitment to cooperation, enabled local economic development, and maintained close geographical and social relations between food producers, processors and consumers. The logic argued was that a short food supply chain is based on geographic proximity (shorter physical distances), social proximity (direct connections between producers and consumers, connection with local food traditions and identities), and economic proximity (exchanges through different types of markets, money circulation, local governance), and can generate social, environmental, and economic benefits.

While these were lofty and notable aspirations, they were only assumptions. There was no evidence to support these claims. These views were nothing more than dogma. In fact multiple local and international reports and assessments had challenged the localisation dogma (Born and Purcell, 2006; McClintock, 2014; Battersby and Watson, 2019; Haysom, 2018; Haysom and Battersby, 2023), and in the case of Cape Town, it had been previously found that such localisation approaches can in fact increase vulnerability, not reduce it (Battersby, 2014).

While the assumption that in the wake of COVID-19, stimulating growing and local production might offer a possible pathway to relief, the approach reflected a significant misread of the structural systemic challenges faced in the food system. This was clearly evident prior to COVID-19 but seldom actively engaged. These systemic fractures needed engagement, across multiple scales, not just local, if positive food systems actions were to be achieved, the focus could not just be on local issues.

As a consequence of this positioning pivot, many food systems actors who had been active and energetic FF members retained an interest but withdrew their active participation in FF activities. The resultant restructuring led to an enclavism of special interest actors, many of whom self-affirmed their importance,

[29] See: https://wcedp.co.za/wp-content/uploads/2022/03/Report-WC-Food-forum-Strategy-Session-19-Aug-2021.pdf (page 2)

disregarding the many other essential voices. Even more problematically, this pivot, transferred the responsibility for solving food systems issues from the state (the authorising environment) – effectively those bound to address the evident systemic challenges through both legal and ethical prescripts – to the most vulnerable, small scale producers, any of whom farming on insecure, infertile land, with limited extension and resource support. The irony of transferring the responsibility for fixing the food system to the poor majority, the same majority whose need prompted the formation of the FF seemed lost on those driving the FF. similar hubris is evident in other such processes.

### 7.2.3. Governance of MAPs and other modes of engagement

Given the development challenge in Africa, and specifically in African cities, a different approach to urban food systems governance. Governance models active in African cities have not necessarily paid due attention to entrenched power and processes of exclusion (as highlighted by Moragues-Faus et al. 2023). As Moragues-Faus et al. (2023: 14) caution, "despite wide acknowledgement of the importance of considering and engaging with multiple stakeholders in urban food governance transformation, there is an increasing critique that multistakeholderism does not clearly contend with power." It is essential that governance processes avoid creating the democratic deficit described by Swyngedouw (2005) and enable greater participation, embracing the politics of urban food.

In part as a result of the drivers that prompted the decision to reject developing a food charter in Cape Town and the Western Cape region, but also the legacies of exclusion (on many levels), but also related exclusionary processes, such as language, class, education and spatial and economic exclusion, other actors have worked to create other modes of multi-actor processes. These are not processes that seek to drive immediate change but more processes aimed at sharing knowledge, skills, insights and possibilities within the food system. These processes are convened by actors with a specific, but clearly articulated positionality, but at the same time, are intended to be inclusionary. Importantly, they all also seek to move away from the "sage on the stage" approach to knowledge sharing, espousing a more conversational approach. These are not MAPs as generally framed, they are not multi-stakeholder governance groups. These are platforms for food systems conversations.

### 7.2.4. Cape Town food system conversations

#### Food Imbizo

Emerging from a reflective critique of the Western Cape Community of Practice, a new platform the Food Imbizo was launched in November 2023.

The Food Imbizo aims to grow connections, share and generate knowledge that can support more democratic, just, and transparent decision-making about food in South Africa.

Given that food concerns us all and is fundamental to health, it expresses our sense of identity and belonging, its production, processing, distribution, retail and consumption has significant environmental impacts and provides jobs for thousands, the Food Imbizo seeks to bring excluded voices into conversations about the food system.

The decisions which shape food systems and food environments are generally made behind closed doors in corporate boardrooms, food science laboratories, or government offices. This allows powerful stakeholders in the food system to benefit at the expense of the vulnerable and marginal. The consequences include widespread food insecurity, malnutrition, economic exclusion, and environmental destruction.

The premise of the Food Imbizo is that everyone who eats is entitled to a voice in governing food together towards more desirable futures. This means that the approach adopted by the Food Imbizo is based on participatory food democracy and knowledge co-production.

Membership is open to anyone who participates in our gatherings.

The focus is mainly on the local and provincial level of governance in South Africa as we believe that at the currently time this is where the most room for manoeuvre, in terms of innovative and adaptive solutions, can be found.

The approach applied by the Food Imbizo is to pursue its broad aim of contributing a transition to a more just and sustainable food system in South Africa through improved food system governance, the Food Imbizo has the following objectives:

- Build a collaborative stakeholder network
- Promote, exchange and connect different types of knowledge and action for policy change
- Create awareness of food system failures
- Build a coalition for action
- Understand broader food system challenges
- Draw on different perspectives
- Inform decision-making
- Identify research gaps
- Align with national and local priorities and policies

These actions are driven by a conversations approach where engagements are facilitated and open.

## FACT Food Dialogues

Poverty, social and economic inequality are the structural reasons for the prevalence of hunger and malnutrition. Exclusive decision-making processes contribute to the persistence of inequalities. To progressively realise the right to food, urban food system transformation must enhance accountability and transparency of governments and decision-making processes. Increasing accountability cannot be achieved by working at the grassroots level or with government authorities in isolation of each other. The FACT strategy is to enhance accountability by empowering grassroot actors to become participants in food governance decision-making processes, rather than remaining passive recipients. As a principled position, governments' capacity to collaborate with grassroots actors needs to be enhanced (Paganini and Weigelt, 2023).[30]

In the South African context, hunger is related to shame. Hence, a struggle against hunger cannot emerge until hunger is destigmatised for those who experience food insecurity (Paganini et al., 2021b). This means empowering local communities to participate in decision making and enhancing their ability to hold their local government accountable to its obligations. FACT's food dialogues are designed with this aim in mind. Their food dialogues concluded that a deeper understanding of food systems and food insecurity enables citizens to assert and claim their rights (Buthelezi, 2022). This represents a critical shift from government programmes that treat people as recipients of food aid as charitable gifts to a consideration of people as actors in the food system and recognising their legal rights. Further, dialogues led to building community agency to actively contribute to realising that right, rather than silently waiting for state relief. Further, building people's agency through communal action, such as community kitchen work, also encourages people to take direct responsibility for their livelihoods so that they rely on state assistance only when absolutely necessary (Paganini et al., 2021a). In the scoping research, FACT argued that communities remain in the bubble of their own being and doing when undertaking small actions, without addressing systemic challenges, their linkages, and their drivers for change (Paganini and Weigelt, 2023).[31]

The theory of change of the FACT food Dialogues and related processes includes four elements:[32]

[30] See: https://downloads.ctfassets.net/rrirl83ijfda/6jVEsBShRq8tykTr0wSF9l/7bf59b814b7a4bff3608d171ea100aa5/Scoping_report_REV_17apr.pdf (Page 16)
[31] See: https://downloads.ctfassets.net/rrirl83ijfda/6jVEsBShRq8tykTr0wSF9l/7bf59b814b7a4bff3608d171ea100aa5/Scoping_report_REV_17apr.pdf
[32] See: https://downloads.ctfassets.net/rrirl83ijfda/6jVEsBShRq8tykTr0wSF9l/7bf59b814b7a4bff3608d171ea100aa5/Scoping_report_REV_17apr.pdf

1. Rights literacy: To increase accountability, communities must be aware of their rights and possible redress mechanisms. Transparency is equally key. Understanding rights and access to information are preconditions for holding the state accountable.
2. Supporting spaces for communities to articulate their voice:
3. Mapping responsibilities: The state is often perceived by community members as incoherent. Between the different spheres of government, there are conflicting policies, ideologies, and agendas that hamper short-term solutions and long-term commitments. In addition to targeted community empowerment and process design, enhancing accountability necessitates a detailed understanding of the different departmental responsibilities, at city, provincial, and national levels.
4. A dialogue process that links communities' voices with the relevant government bodies: Accountability requires a process to enable communication between communities and the state. Through this process, governments will benefit from a structured exchange with communities to whom they often lack access (Mathekga & Buttus, 2007). This was particularly expressed during the pandemic, when government officials expressed challenges coordinating food relief in informal settlements (van Wyk & Reddy, 2022). Connecting communities with government is a process that requires careful facilitation and well-designed approaches that take the following considerations into account:

Representation: Our approach encourages people's meaningful participation in food governance processes and addresses accountability of both citizens and governments in a targeted and carefully facilitated actor engagement process. Here, we move away from stand-alone multistakeholder workshops and build a three-year process that is grounded in an engagement strategy on the city level in Nairobi and Cape Town.

> Language: The use of "policy speak" in governance processes often inhibits the active involvement of the very people that such processes intend to serve. If food governance processes intend to address the root causes of vulnerability and hunger, they must make efforts "to speak the local language", both literally and conceptually. The state is often perceived by community members as incoherent. Between the different spheres of government, communities expressed that they need a detailed understanding of different departmental responsibilities, at the city, provincial, and national levels to properly engage the state and identify entry points for accountability. Understanding the state, its mandates and roles is one of the key objectives of our accountability work.

(Paganini and Weigelt, 2023)

## Food Dialogues (now Food Indaba)

The Food Indaba (formerly Food Dialogues) is an annual programme of talks and events that focus on the local food system. The Food Indaba brings together a wide range of speakers involved in shaping the food system, providing an opportunity for food growers, academics, activists, writers, nutritionists, policy makers, food lovers and anyone interested in sustainable approaches, to engage in key issues intimately connected to the food we eat, and the future of food. The goal is to foster a healthier, more resilient, and just food system.[33]

The Food Indaba run in 2023 ran three platforms around which curated conversations were engaged:

- Dialogues Through Food: An eating part of the programme, with a range of chef-lead culinary adventures, where the focus is on food stories and the why and the where of our food choices, as opposed to the how.

[33] See: https://fooddialogues.info

- Polycrisis and the Food System: We are barely out of a global pandemic, and are now dealing with load shedding, a pending water crisis, the impacts of climate change and potential natural system shocks. How do we strengthen our food systems to face these challenges?
- Pan African Online Conference: Food Dialogues 2023 introduced an online only conference event, as well as laying the foundation for Food Dialogues events in other African urban centres, thus creating both Pan-African and global connections around our food systems.

While each of the above three engagement processes formulate their approach and curate engagements around specific identified areas of action and need, all three offer platforms for engagement. These processes avoid actively driving any specific agenda but are all enmeshed in a wide process of governance and food systems change. Whether these are MAPs is a question open for discussion. However, the clear ideological stance, albeit slightly broader than other MAPs, does resonate with participants in these processes, who participate because they feel the need to engage and that these positions resonate with their own. Additionally, these platforms are curated to enable engagement with the identified participants and stakeholders in these processes.

Importantly however, is that these platforms, while actively engaging governance, do not attempt to adopt a governance position.

### 7.2.5. The Right to Food and obligations of different spheres of government

Despite being enshrined in the South African Constitution as a Right, as others have argued (De Visser, 2019), food is also a public good (See May, 2017). Such a description invokes notions of a duty of care and state centred obligations that require action from all state actors, coupled with processes within policy and governance that enable the fulfilment of this right and access to the public good.

In a time when the rural demographic environment dominated, there were clear and understood links between food security and agriculture. As society has urbanised, policies and governance mandates have not kept up with these changing demographics. South Africa is a particular case in point where the national Department of Agriculture, Land Reform and Rural Development (DALRRD) still retains the overall mandate for food security. Policy located within a department, whose primary mandate is food production, results in a particular view of food security needs, but also a predominant perception of where the food insecure may reside, the rural areas of the country. This maintains the centralised, national government governance mandate. Problematically, this perspective of the location and governance of food insecurity drives fiscal allocations, or budgeting, that facilitates action, and governance authority.

Rights to Food and Nutrition are enshrined within the South African Constitution, in Section 27.1.b and 28.1.c.The South African constitution obligates all state entities to ensure the progressive realisation of the right to food (RSA, 1996). This obligation does not rest solely on national and provincial governments, it also applies to, and binds local government. This food security, and by extension food system, obligation is further reinforced by the food system related obligations placed on urban areas, or local government, through Schedules 4 and 5 of the same constitution (see De Visser, 2019; RSA, 1996). However, despite this broader and encompassing obligation, the absence of both a policy mandate (as opposed to a legal mandate derived from the Constitution), and a fiscal mandate, through state provided funding to programme food security responses, means that food security remains a so called “unfunded mandate” in the eyes of most local government actors (see Battersby et al, 2014).

Importantly, however, even without specific food security programmatic funding, the South African policy landscape offers city managers, politicians and bureaucrats opportunities to engage urban food questions far more deliberately than they do at present. As De Visser (2019: 25) suggests:

> the Constitution allocates many functions to local government that offer points of leverage for municipalities to make meaningful contributions to the realisation of the right of access to food.

Central to De Visser's argument is the role of planning in creating an environment in which local government can enact proactive food system related responses pointing out that:

> 'Municipal planning' is one of the most critical local government powers. It is the power of municipalities to plan and manage the use of land, which is commonly referred to as 'town planning'.

(De Visser, 2019: 14)

Drawing on De Visser's (2019) argument and links to specific jurisprudence, specifically those relating to judgements made in the context of the realisation of specific entitlements enshrined within the South African Bill or Rights, a key tool that cities hold is through its planning regulations. This is important for two reasons, the first is that planning is a direct local government competence, secondly given the integrated vision of the current planning processes (SPLUMA, 2013). A number of overriding principles serve to frame how the integration between planning and urban food system governance would locate within the planning agenda. A central consideration is the need for planners and urban governance actors planning of settlements and food systems ensure that:

- Residents have to access an adequate, healthy and appropriate diet
- Settlements are socially inclusive
- Settlements are equitable
- Settlements are more resource efficient
- Settlements are sustainable
- Cater to cultural difference

(Park Ross, 2019: 5)

South African cities have strategic tools and mechanisms which include amongst other things, the Integrated Development Plans and Spatial Development Frameworks, both of which need to engage with the urban food system in significantly more detail. A scan of many of these notes that city scale strategic engagement in the food system is largely absent, bar some mention of urban agriculture projects or the "formalisation" of hawkers and traders. In South Africa, planning is both implicated in the emergence of unsustainable and unhealthy urban food system patterns and need for adequate and comprehensive responses (Battersby, 2017). However, it remains largely ignorant of its deep impacts on the food system (Battersby, 2017). The absence of a definitive, pro-active, integrated and pro-poor strategy focusing explicitly on the informal sector in Cape Town is a key example of the absence of deliberated food system planning (Skinner and Haysom, 2016). It is through planning that opportunities for a more inclusive food system lie, where the integration of direct food system interventions and the embedding of food considerations into planning decisions are most evident. These needs are essential because "improved access to and utilisation of food is essential to current and future generations. With cities at the centre of our civilisation, it will become increasingly critical for food to be centrally reflected in the planning of urban areas" (Stamoulis et al., 2018: vi).

### 7.2.6. Conclusion

While Northern and European urban food governance structures might well reflect the activating authorising environment positions detailed in Figure 2, we argue that the power dynamics, systemic slow violence (Nixon, 2011) of colonial and later structural adjustment or structural austerity, has ensured that significant rifts exist within society. These rifts are both class based and power based.

Internationally, there is a trend that seeks to decentralise food governance, a trend that sees cities, be this government, society or both, taking back control of their food systems (Raja, Morgan and Hall, 2017). Increasingly these processes are seeking ways to expand urban governance mandates, at times even seeking change beyond the urban food system (Moragues-Faus and Morgan, 2015; Harper et al., 2009;

Schiff, 2008). These processes carry significant hope for changes in the food system. Often Multistakeholder processes are seen as the vehicles through which this change should be enabled.

Urban spaces in Africa remain disputed spaces, spaces where politics, histories and the contestation over scarce resources often silence voice and agency (Haysom and Currie, 2023). Cape Town is no exception.

Should urban food system governance in Africa focus on establishing urban ministries of food?

Should urban food system governance in Africa focus on establishing a further layer of contested and politically fraught governance through pluralistic approaches?

What is required is for food to become central to all facets of city governance in Africa's urban transition. Food access cannot be left to the vagaries of market forces and globalised food systems. However, those responsible for protection society from these challenges, the state, is falling short in their obligation of a duty of care. Global food systems are increasingly dictating not only the look and feel of many African cities, but also the health outcomes of many urban residents (Haysom, 2018).

An alternative urban food governance paradigm needs to adopt a more people-centred, pro-poor approach to city planning and infrastructure which sees food as a public good and enacts planning and governance processes to ensure access to this good. This paradigm is about food but also moves far beyond it. What structures are most suited to facilitate such paradigmatic shifts? The MAPs described here offer insights into a number of key approaches.

Firstly, MAPs do not need to be led by diverse actors and in fact, given the absence of systemic engagement in urban food systems related issues, an approach to MAPs that focuses exclusively on state actors may well be more suited in the African context.

Secondly, as the dialogue processes described demonstrate, assuming that MAPs need to be governance oriented may also not always be ideally suited to food systems transformation in Africa. MAP activities that build conversations, create dialogue might offer alternatives given the contested nature of African cities, enabling more active and diverse participation, with reduced risk to participants.

Thirdly, overly ideological positions, while resonating with some actors, might prove to be a trap, one that ultimately undermines the intended outcomes. This is particularly important when the modes of practice and key areas of action and focus are determined by actors outside the contextual boundaries of the emerging MAP. This does not mean that these actors have no value, but ensuring contextual relevance, relevance that highlights the intersecting processes that drive food systems actions and risks in a specific context is key.

For African cities, ensuring that "food is on the table" is an urgent need and one that cannot be overstated. Governance of urban food systems is a key challenge. As such, urban areas need to engage in urban food related questions. Equally African cities need to reframe urban food systems governance. However, the approaches to engaging in these issues remain contested and require critical engagement. MAPs offer opportunity but the drivers, positions and approaches applied when formulating MAPs require far greater interrogation and discourse before action is taken.

Finally, the need for slow building of networks that enable trust and mutuality are an essential aspect of MAP processes. In the MAP case studies discussed, the absence of such a network in both the FF and the Stellenbosch case highlighted the hubris of a core group assuming the answers were simple. The enduring opportunities offered by the CTFSWG is largely built and maintained by the network building, and maintaining, skills of the actors involved in this process. This also applies to the trust and mutuality built during dialogue processes. These are critical aspects that ensure the success of a MAP, but seldom recognised.


A collection of spices at a market in Muizenberg
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

# 8. Urban Agri-food Systems entrepreneurial and trade contexts

In the South African context, there are multiple drivers that curtail innovation and the opportunities for wide reaching and robust innovation processes. This is perhaps most evident in the food system. Despite efforts by the state, and post-apartheid government policies to diversify (from a racial, gendered and class perspective) the food system, little has been achieved. There are a few "black swans" that counter the existing narrative but the reasons for these innovators succeeding in the food system are complex and further reflect the exclusionary and hostile environment faced by those wishing to innovate in, and counter the current domination of a few actors in the South African Food System.

To review the state of innovation in the food system in Cape Town and South Africa requires significant engagement across multiple food system entry points. There is innovation in the waste and recycling space. A case in point is the innovations around Black Soldier Fly and food waste (GreenCape, ND)[34] or the diversion of household waste to urban growers (Ladles of Love, ND).[35] There is innovation in the telecoms and related platform economy space. Here examples of online purchasing and platform based delivery offer useful insights into trend lines and investment sites. Platform industries are seen in the so-called sharing economy, often phrased as platform capitalism. These industries emerge and are best seen in firms such as Uber and Airbnb who monetize, through specific technologies of mediation, the platformed networks, the assets and the precarious labour of those who are described as 'the entrepreneurs of sharing' (Pollio, 2022). Food system actors are constantly innovating as a result of fluid and variable food system activities. For example, there has been significant change in the South African food landscape as a result of loadshedding. Here longer shelf life items are being promoted, Items that require minimal preparation, such as a-maize-zing pap in a bag[3] which reduces both cooking time and storage issues.

Anyone active in the food system space across the agri-food value chain would be able to offer countless examples of innovation and novelty. These are the unique projects and innovations that have been able to wade through the challenges associated with agri-food system innovation. Such examples are useful in highlighting what can be done and the possibilities that exist. However, such projects, we argue, also offer false hope.

In most instances, such projects either require incredibly long testing periods, often compounded by onerous compliance related hurdles misaligned to the innovation. The result is that innovations ultimately come at a significant cost, or fail to scale from project or test-bed to mainstream activities. Ultimately innovation is stifled and curtailed. There are many reasons for this but a number of key themes can be seen as largely cross cutting and broadly applicable.

The challenges associated with innovation are also deeply embedded in South Africa's racialised history. Seldom considered is the role that this history played in enabling certain types of industrial and business modes, modes that still today dominate, and generally control, most value chains and business nodes. Further, this history has meant that bias, racialised and latter class-based privilege, and other related factors, further compound the historical issues and stifle innovation, working within small, exclusive networks and within the same "old boys clubs".

These combined challenges were captured in a recent review of innovation in South Africa. The question is what is needed to enable a shift away from the business as usual approaches? Habiyaremye et al, who, in a review of South African Innovation landscape more broadly, point out that:

> Developmental progress has been uneven across all dimensions of the socio-economic landscape and new ideas are needed to deliver transformative outcomes. Of particular relevance here is the role of innovation in catalysing, accelerating and supporting progress towards the addressing of these challenges. A more central positioning of an innovation-based approach, integrated across policy domains, could be fundamental to a shift away from 'business as usual' and to meaningful progress around South Africa's socio- economic and environmental challenges.
>
> (Habiyaremye et al, 2022: iv)

This section builds on this critique but reflects on six key aspects associated with the challenges associated with food systems innovation in South Africa. These six aspects are in no way comprehensive and each different product of site along the agri-food value chain will be able to describe multiple blockages and challenges. However, unless these factors are not actively engaged, and fundamentally changed, business as usual will remain firmly in place. Also, given sustainability, equity and viability factors, unless a radically

[34] See: https://greencape.co.za/wp-content/uploads/2022/11/Spent-Brewery-Grain-to-Insect-Protein.pdf

[35] See: https://ladlesoflove.org.za/feed-the-soil/

different approach is adopted, the viability of the South African food system, cities and economy will face continued threats and in fact not stagnate, but potentially become less viable. The consequence of this is beyond the scope of this reflection, but signs are evident in recent protests, in increasing levels of dietary challenges, and a fractured social compact.

These six factors reflected here have been considered for three reasons. The first is that they are, in a broader scope, generalisable across the entire agri-food value chain. The second is that these factors are informed by historical legacies that remain entrenched and require dislodging if innovation is to be enabled. The final reason is that the factors discussed perpetuate the marginalisation of innovators and their role in the agri-food system, entrenching exclusion and inequities, despite claims to the contrary.

These six areas of focus and discussion are:

- Consolidation and the histories that have enabled this
- Conservative operating policies and governance structuring
- Policy naivety and hubris
- Exclusionary, curtailing and anti-competitive modes of operating
- Spatial inequities
- Funder requirements

This review is more than just a review of literature and reports examining policy and related activities. The earlier experience of authors in parts of the agri-food value chain and policy environment mean that while dated, accounts of personal experience and reflections are offered based on actual encounters with the systems that stifle innovation. Here, for a variety of reasons, anonymity needs to be ensured and as such, cases are discussed in more general terms. Where permission has been granted to provide names and project details, these are provided.

The report provides an overview of the state of the South African agri-food system and then moves to discuss each of the five focus areas, the innovation inhibitors. These are engaged in varying levels of detail as some require examples, in some cases examples can be used, and in others, the reflections are more generalised.

# 8.1. The South African and Cape Town Agri-food system

## Agri-food system and trade

Over the period preceding 2022, South Africa experienced a rapid rise in global agricultural commodity prices, caused by a combination of external shocks that impacted supply and demand dynamics, but these further fuelled uncertainty in global futures markets for agricultural products, input supplies and energy (BFAP, 2022). As lockdown regulations eased and economic growth started to recover, Russia invaded Ukraine (in February 2022), sending further uncertainty through global energy, food and fuel markets. This severely affected vegetable oil and wheat markets due to Russia and Ukraine's relatively large share in global trade (BFAP, 2022).

The agricultural sector of South Africa expanded by 8.3% in 2021. Despite higher input prices, real agricultural GDP in South Africa in 2022 was projected to improve by 5%, making agriculture the strongest performing sector in the South African economy since the start of COVID-19 (BFAP, 2022). According to the 2022 Bureau for Food and Agricultural Policy forecast, the resilience and the performance of the wider South African agro-food system, "despite a wave of domestic challenges of rapidly deteriorating infrastructure (mainly roads and ports), load shedding and riots around major trading routes", still reflected low food price inflation (at 7,6%) compared to countries and regions such as the USA, the EU, Brazil, Kenya and Zambia (BFAP, 2022). The last time inflation was this high on global agendas was during the energy crisis of the 1970's. In South Africa, the rise in energy prices is also adding the proverbial fuel to the food inflation fire. With staple food commodities such as bread and cereals in 2022, 8.4% higher compared to 2021, rising fuel costs are further contributing to inflationary pressures through manufacturing and distribution costs of food (BFAP, 2022).

## Employment landscape

According to the 2020 Statistics South Africa (StatsSA) General Household Survey (GHS), the dominant income sources of households in South Africa was salaries / wages followed by grants (StatsSA, 2021). From 2019 to 2020 the percentage of SA households who received income from salaries, businesses and remittances decreased, resulting in increased grant dependency, expected within the context of the COVID-19 pandemic. Whether COVID-19 was solely to blame for these shifts is still to be fully ascertained but anecdotal evidence, and higher than expected unemployment figures in 2023, the expanded unemployment rate is 42,4% and the official unemployment rate is 32,9% (StatsSA, 2023), indicate that a wider re-calibration of the (un)employment, economy and industrial landscape is underway.

## Foods consumed, or not, and the nature of the South African diet

In South Africa, cereals have remained the largest and most important source of dietary energy, contributing more than 50% to total kilocalories per capita per day. Meat, sugars and sweeteners, and vegetable oils are ranked together in second place. In 2018, these three food groups each contributed 11% to the average total kilocalories per capita per day. The contribution of vegetables and fruits remains low, with each comprising approximately 1% of average total kilocalories. The inadequate fruit and vegetable supply is confirmed by the per capita per annum amount, which translates into a total of 170g compared to the WHO recommendation of 400g per capita per day (Swart and Sambu, 2022).

In most South African reports, hunger is said to occur when children or adults reportedly go hungry sometimes, often or always. In 2002, 23% of households reported hunger but this declined gradually over the years to 10% by 2018. Despite this decrease, a significant proportion of households continue to report hunger. In 2018, for example, 21% of households in the poorest income quintile reported hunger, compared to 3% of households in the richest income quintile (Sambu and Swart, 2022). Since 2009, the General Household Survey run by Statistics South Africa (StatsSA GHS) has collected data on household food access levels, based on the following indicators: whether or not households ran out of money to buy food, cut the size of the meals consumed, reduced the variety of meals or skipped meals altogether. These indicators are combined to generate household food insecurity access levels. An analysis of trends between 2009 and 2018 indicate that, similar to the reported household hunger rates over a comparable period, food insecurity access levels remained fairly stable, with the percentage of households reporting inadequate or severely inadequate access averaging 16% and 6%, respectively, over the 10-year period (Sambu and Swart, 2022).

The share of persons that experienced hunger declined significantly from 29.3% in 2002 to a thirteen year low of 11.1% in 2019. Between 2011 and 2020, the share of people with limited food access was consistently higher than the share of people experiencing hunger (95% higher on a 10-year average basis), and also shows a decreasing trend over time from 25.2% in 2011 to 22.8% in 2020 (StatsSA, 2021).

Despite these generalised trends, COVID-19 created significant disruptions to food supply driven by lockdowns and the associated restrictions in income and earnings. Figure 69 reflects the averaged states of hunger and constrained food access over the COVID periods April 2020 – May 2021 demonstrating the state of extreme vulnerability and as Battersby (2020) argued, COVID demonstrated that reasonable food access was simply a highly vulnerable veneer (Battersby 2020).

The financial well-being and performance of South Africa's agro-processors are largely tied to the performance of the local economy and to a lesser extent the export market. This is mainly the result of the county's dependence on importing a number of critical final manufactured goods in which our competitiveness is lacking. Over the next five years, given the post COVID economic downturn, loadshedding and wider economic challenges faced in South Africa, and the Western Cape, it is unlikely that the purchasing power of individuals will be able to absorb the increases in food and beverage prices. This means that the costs that were absorbed during the COVID periods between 2021 and 2022 are now being transferred to consumers, as evidenced by greater than usual food price increases.

The FAO Food Price Index (FPI) is a measure of global changes in agricultural commodity prices. In March 2022 the index reached a new all-time high, with particularly high inflation observed in the oils and cereals categories (FAO, 2022)[36]. These diet related aspects, and cost changes all impact the nature of the diet and the food baskets of most South Africans, and Cape Town residents.

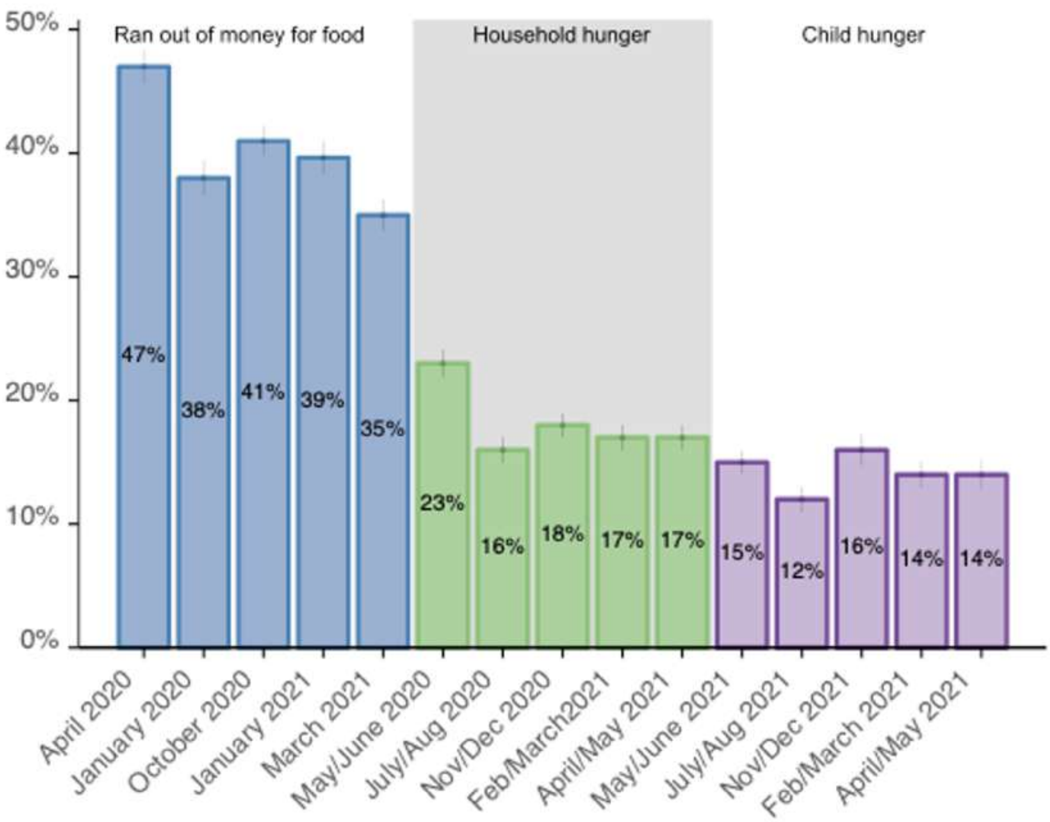


Figure 69: Food insecurity and hunger: NIDS-CRAM Waves 1 to 5 (Source: van der Berg et al, 2021)
Note: van der Berg at al calculations from NIDS-CRAM Wave 5 data. The different dates are because the question on food money referred to the month before the survey fieldwork took place, while the questions on hunger referred to the previous week during the fieldwork period.

## 8.2. Understanding the cost of a food basket in South Africa, and Cape Town

In South Africa specifically, year-on-year food inflation was recorded at 7.6% in May 2022, whilst month on month inflation edged up further by 0.6%. This was predominantly driven by the global factors already highlighted, which are apparent in high local grain and oilseed prices. In the case of meat, it also relates to short supply, which has driven prices higher despite increasing pressure on consumers' disposable incomes.

[36] See: https://www.fao.org/worldfoodsituation/foodpricesindex/en/

Different food basket strategies are applied by different research groups. The Pietermaritzburg Economic Justice and Dignity group[37] apply a household food basket review strategy. The Household Food Basket has been designed together with women living on low incomes in Johannesburg (Soweto, Alexandra, Tembisa and Hillbrow), Cape Town (Gugulethu, Philippi, Khayelitsha, Langa, Delft, Dunoon), Durban (KwaMashu, Umlazi, Isipingo, Durban CBD, Hammarsdale, Pinetown), Pietermaritzburg, Mtubatuba (in Northern KwaZulu-Natal), and Springbok (in the Northern Cape). The PMBEJD Household Food Basket includes the foods and the volumes of these foods which women living in a family of seven members (an average low-income household size) report that they typically try and secure each month. The PMBEJD Household Food Basket is not nutritionally complete. It is a basket of food which women try to secure each month for their families given affordability constraints. Food prices are tracked directly by women data collectors off the shelves of 47 supermarkets and 32 butcheries that target the low-income market and which women identified as those they shop at. Food selection at the supermarket shelves mirrors how women themselves make decisions at the supermarket shelves given affordability constraints, notably that the foods are chosen on relative affordability and reasonable quality, and food brands are switched to seek out the cheapest prices and special deals. The selection of food brands is dynamic and subjective. Women shop around for bargains: this specific methodology used provides an accurate cost of a monthly household food basket, as purchased by women living on low incomes. There are 44 foods in the Household Food Basket. The period for data collection is the first week of each month (PMBEJD, 2023).

The change in the average cost, across all sites, of the PMBEJD Household Food Basked increased by R 379,78, or 8,3% between July 2022 and July 2023, at a rate higher than inflation. Year-on-year, the cost of the Cape Town household food basket increased by R406,53 (8,7%) from R4 648,26 in July 2022 to R5 054,79 in July 2023 (PMBEJD, 2023: 12).

The Bureau for Food and Agricultural Policy have devised the Thrifty Healthy Food Basket (THFB). The THFB measures the monthly cost of basic healthy eating for a South African reference household consisting of 2 adults and 2 children. This measure gives an indication of the typical cost of obtaining a basic healthy food selection with enough daily energy and adequate nutritional diversity. This THFB is measured in comparison to the 'maize meal only' food basket for the reference family of four which estimates the monthly cost of obtaining the total monthly energy requirements of the household from only one food source – the most affordable starch-rich staple food in South Africa (BFAP, 2022).

From 2020 to the first quarter (Q1) of 2022 the cost of the BFAP THFB increased by R298, rising by 5.5% from 2020 to 2021 and a further 4.9% from 2021 to Q1 of 2022. Over this period the BFAP THFB was on average 297% or R2 290 more expensive than the 'maize meal only' food basket, stressing the significant cost difference between minimum adequate energy intake and a basic balanced food basket in the South African context (BFAP, 2022).

The South African food consumer price index (FCPI) measures changes in the prices paid by consumers for a basket of food. Driven by COVID-19, the FCPI reflected the highest level in 13 years for the first quarter of 2021 (StatsSA, 2021). This indicator shows the affordability of food in South Africa and raises concerns as income inequality and unemployment rise in the country, exacerbating food affordability for many South Africans (Habiyaremye et al, 2022).

### 8.2.1. Impacts of global and local dynamics in agri-food system outcomes

The food system related figures are all embedded within a wider South African and regional economic context. The consistently high levels of food insecurity and hunger, despite some reported improvements,

[37] See:: https://pmbejd.org.za/index.php/household-affordability-index/

and with notable challenges associated with COVID-19, do not reflect the trend lines associated with other countries classified as upper middle income countries.

After entering 2022 in a weaker-than-expected position (IMF, 2022), global economic recovery continued to face further setbacks. Inflation reached levels counted among the highest seen in several decades, most regions are experiencing tightening financial conditions, and the continued Russia-Ukraine war and lingering COVID-19 impacts placed additional pressure on the economic outlook (IMF, 2022). South Africa's reported annual growth rate for 2022 recorded at only 2,0% (CCT EPIC, 2022). Figure 70 reflects these challenges, depicting sectoral real GDP-R growth rates in the Western Cape and South Africa.

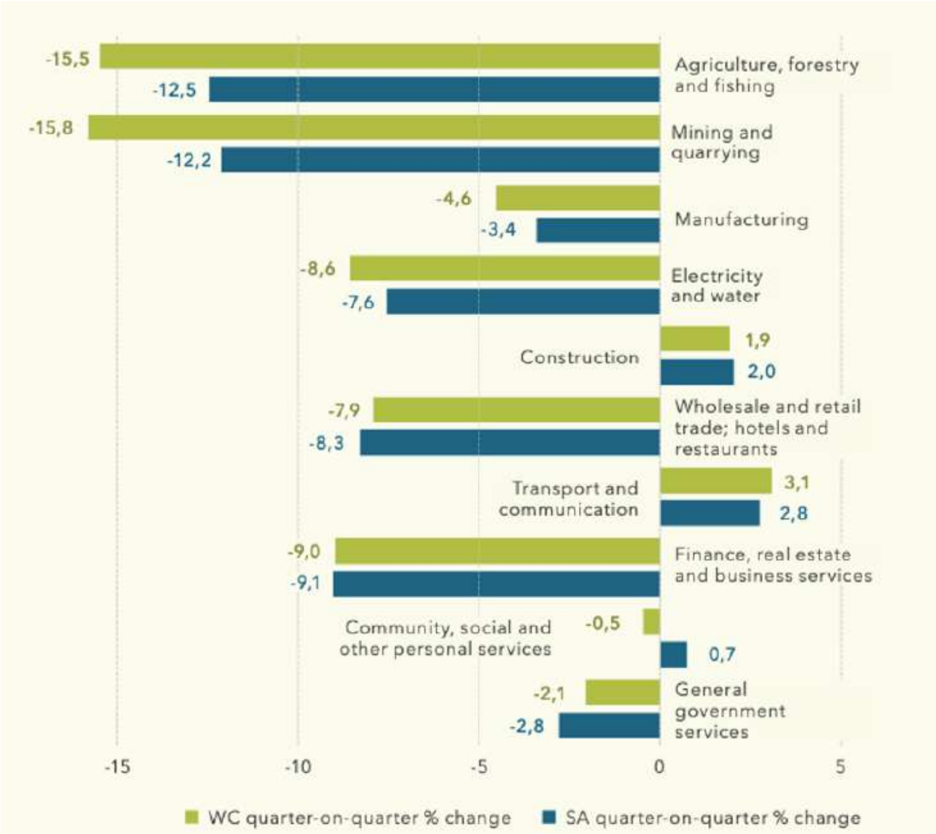


Figure 70: Sectoral real GDP-R Growth Rates in the Western Cape and South Africa
(Source: CCT EPIC, 2022: 21)

The Western Cape economy contributes around 14% of South Africa's gross domestic product (GDP). In line with the national economy's performance (-4,9%), the Western Cape economy recorded an annualised contraction of 5,3% quarter-on-quarter for the fourth quarter of 2022. For the period ending in the last quarter of 2022, the agri-food sector in South Africa and the Western Cape was under severe strain.

However, even if Cape Town's primary sector (agriculture, in particular) did mirror provincial trends, it is unlikely that this would have had as large an impact on the overall growth rate of the city, as the primary sector contributes only 1,5% to Cape Town's total gross geographic product (GGP). Rather, the performance of the city's economy in the fourth quarter of 2022 was driven by the performance of the finance, community services and trade sectors, which, in 2022, comprised 40%, 19% and 13% of the city's economy respectively (CCT EPIC, 2022).

### 8.2.2. Innovation, and hustle – the informal food economy

Most current reviews of economic performance in Cape Town and the Western Cape are silent on the role and contribution of the informal sector to the economy. However, in 2015, an entire Economic Performance Indicators for Cape Town report was focused on this sector of the economy. No report has had such focus since. At the recent informal vendors summit (in June 2023), policy innovation in the agri-food sector was limited to food trucks, largely disregarding much else. Importantly, the informal economy-focused 2015, Economic Performance Indicators for Cape Town report made the point that

> The informal sector is a crucial and often overlooked part of Cape Town's economy. … the notion of 'informality' refers more to the conditions of work than to any specific type of economic activity, and should not be taken to imply discreteness from the rest of the economy. … the informal sector incorporates a broad spectrum of economic activities and business typologies in a diverse range of geographic locations across the city, with varying intensities of relations with formal business. While Cape Town's informal sector may be relatively small, especially by emerging- country standards, its penetration into the most vulnerable households in the city and its impact in terms of poverty reduction are disproportionately large.

(CCT EPIC, 2015: 45)

This combined notion of both penetration into vulnerable households and possible role in poverty reduction is clearly evident in both the distribution and the role that food related businesses play in this sector. Figure 70, although dated and informed by trends and processes evident before COVID-19, offers a sense of the nature of informal trade and the role that this sector plays in the wider economy. It is noteworthy to reiterate that this sector has not been reported on in later City EPIC reports and is effectively reported out of the wider economic landscape in Cape Town as a result of the disproportionate focus on the formal economy in the subsequent reports.

## 8.3. Constraints to Innovation in the Western Cape and Cape Town

### 8.3.1. Consolidation and the histories that have enabled this

In a review of the performance of South African agriculture since 1994, Vink and an Rooyen provide detail on the transformation of the South African food production, and related input supply structures following the transition to a democratic South Africa. The authors however, rightly point out that a review of contemporary South African agriculture and the related agri-systems is flawed unless due reflection is given to the historical contexts, policy positions and structuring of the sector.

> The performance of agriculture in South Africa has to be seen in the context of the economic history of the country, which saw heavy investment in (white) commercial agriculture, a key constituency of the apartheid state, through most of the twentieth century. The state supported farmers through legislation such as the Cooperative Societies Act (1925) and the Marketing Act (1968), through investment in research and development, infrastructure, extension services and the settlement of farmers, and through protection of domestic markets from international competition. At the same time, a range of measures, such as the Land Act (1913) and the creation of the homelands, were put in place to suppress black farmers, both in the commercial farming sector and the communal areas of the former homelands.

(Vink and van Rooyen, 2009: 4)

Despite the general belief , at times more agnotology and right wing ideological hubris, that the dismantling of the supporting structures associated with the racialised policies for one group of farmers took place following the democratic transition, this was not the case. This started a good 20 years prior to democracy in South Africa. Following a series of global, regional and local events in the 1970s (strikes by black trade unions in the Durban region in 1973; the OPEC oil crisis of 1973; the coup d' etat in Lisbon in April 1974 that resulted in South Africa's abortive invasion of Angola in 1975; and the Soweto students' uprising of June 1976), the South African economy had fallen into recession, resulting in a period of prolonged stagflation that lasted until 1994. Based on the events of the 1970s South Africa engaged in the late 1970s in an economic policy shift with a stronger focus on the deregulation of the financial markets, which, in turn initiated a process of deregulation in the agricultural sector that was in fact partially completed by the early 1990s (Vink and van Rooyen, 2009). This de-regulation and steady removal of privileged support initiated fundamental changes to the agri-food landscape. Inefficiencies and under performance of certain parts of the agri-food system were masked by the disproportionate support provided to actors in this system. As the shift in policy took place, starting in the 1970s, marginal groups, and those seeking further opportunity to concentrate their position, resulted in a slow but steady process of consolidation. This has remained a key business strategy, at both the firm and economic scale.

However, generalisations require careful review. Different agricultural sectors encounter different challenges. What Table 5 reflects is the impact of deregulation. In the period between 1996 and 2006, there was a marked move away from field crops towards horticulture. There are a number of reasons for this but the primary reason is that there are limited areas in South Africa suitable for field crops. However, field crop production was actively supported, and heavily subsidised by the apartheid state. This meant that the basket of crops produced were not necessarily reflective of the agro-ecological environment, skewing production, and at the same time, providing a disincentive to innovation. The liberalisation of the sector is also evident in the fact that between 1965 and 2005 imports increased from 4.6% of total agricultural output to a fifth (20%) of total agricultural output (Vink and van Rooyen, 2009).

| | Field crops | Horticulture | Animal production | Total |
|---|---|---|---|---|
| 1966-1970 | 42.5 | 16.2 | 41.3 | 100 |
| 2001-2006 | 30.4 | 26.9 | 42.7 | 100 |

Table 5: Agriculture sub-sector share of output, 1966-2006
(Source: Adapted from Vink and can Rooyen, 2009: 6)

These changes reflect largely formal and large scale agriculture, missing a number of small scale operators who hold significant potential to for innovation and in so doing, to contribute to the country and local food systems. The profile of the South African agriculture sector is detailed in Table 6. Table 6 demonstrates how a small group of large farms, 1,5% of the farming system, generate more than a third of total agricultural income. However, even more alarmingly, Only 2500 farms in South Africa (5%) contribute to over 50% of agricultural sector income.

| Income (R per year) | Number of farms | Cumulative (%) | Wage per employee (R per year) | Gross farm income (R000 per year) | Cumulative (%) income |
|---|---|---|---|---|---|
| > 10 000 000 | 673 | 1.5 | 10 503 | 17 850 383 | 33.5 |
| 4 000 000 – 9 999 999 | 1 657 | 5.1 | 7 758 | 10 330 424 | 52.8 |
| 2 000 000 – 3 999 999 | 3 041 | 11.7 | 4 872 | 5 056 986 | 62.3 |
| 1 000 000 – 1 999 999 | 5 214 | 23.1 | 6 43 | 7 351 291 | 76.1 |
| 300 000 – 999 999 | 11 805 | 48.9 | 4 729 | 5 335 646 | 86.1 |

| | | | | | |
|---|---|---|---|---|---|
| < 300 000 | 23 428 | 100 | 4 266 | 7 404 322 | 100 |
| Total | 45 818 | | 6 298 | 53 329 052 | |

Table 6: Farming statistics by income group between 2002 and 2005
(Source: Vink and van Rooyen, 2009: 32)

These factors, impacting largely the agricultural and farming sector in South Africa, mirror global trends. The contemporary agro-food regime is characterised by the international extension and externalisation of manufacturing chains previously internalised within the organisational boundaries of vertically integrated corporations and, to a large extent, within nation states (Raikes, Jensen, and Ponte 2000, 3–4). World market prices have become decoupled or separated from actual regional production costs, with global political mechanisms at the signing of the General Agreement on Tariffs and Trade (GATT) and then the World Trade Organization (WTO) shaping prices (McMichael 2005).

This indicates an ongoing role for the state and creates opportunities for concentration of production and centralisation of capital in the agro-food sector. Nation states remain at the centre of institutional and regulatory processes, but favour formal corporate interests (Greenberg, 2017: 467). In so doing, the state curtails and at times collaborate in the frustration, at best, and active curtailment, at worst, of innovation in this sector. This is clearly evident in South Africa, with multiple examples being evident, the failure to effectively engage land reform perhaps being the most evident. Such processes also significantly drive centralisation of capital in the agro-food sector. These factors contributed to and amplified three other changes taking place in the South African food system:

> The signing of the Uruguay Round of GATT which led to the formation of the WTO in 1994 and locked countries into trade agreements with major implications for systems of production and distribution; the dismantling of the statutory regulatory systems governing agricultural and food products and their replacement with a combination of greater market forces and industry self-regulation, culminating in the Marketing of Agricultural Products Act (MAPA) of 1996; and amendments to the Cooperatives Act in 1993, which allowed the cooperative infrastructure to be removed from farmer control, and then corporatized and privatised. Combined, these opened the door to expansion of corporate power in the South African system.
>
> (Greenberg, 2016: 3)

Amendments to the Cooperatives Act in 1993 permitted the gradual privatisation of the cooperatives (Greenberg, 2016). The changes to the Act ensured the cooperatives were able to capture part of the massive assets that had been built up over the years and retain them, first for their members (Amin and Bernstein, 1996) and later for shareholders. By the mid-1990s the cooperatives were handling the vast majority of many of the most important crops and supplying or financing major levels of inputs to farmers (Bayley, 2000; 26). Many of them converted into private companies (Greenberg, 2016).

For example, wheat producers and millers cooperatively organised into Sasko and Bokomo merged under the umbrella of Pioneer Foods, and held one third of the wheat flour market in the late 1990s (Greenberg 2016). Cooperatively organised Cape dairy producers formed a company called Bonnita in 1992, with Premier Foods buying a majority share in 1994. The cooperatives originally had their own provincial/regional spheres of influence, but with corporatisation and privatisation, mergers and acquisitions led to a few large national (and then Southern African regional and then global) entities. Notable are the former Oos-Transvaal Ko-op (OTK, which became Afgri) and Sentraal Wes Ko-op (Senwes) which came to occupy dominant positions in the agro-food sector in integrated agricultural services (input supply, storage, logistics, finance, technical support) as well as production operations of their own, such as poultry and maize. Other former cooperatives, such as VKB (Vrystaat) and NWK (Noord-Wes) are also multi-billion-rand corporations today (Greenberg, 2016).

This consolidation and privatisation, often leveraging what was initially state funded infrastructure, such as silos and production technologies, for private gain and enclosure from wider societal access, for profit, has taken place across the agri-food value chain and spans input supply, seeds, machinery, logistics, warehousing, processing and distribution (Greenberg, 2016).

Wholesalers and retailers are at the forefront of supply chain management innovations, copying Walmart's globally successful operations. Supply chain innovations are based on centralised distribution; tight supply chain management built around new ICTs and computing power; data mining and analysis to forecast demand; and global sourcing and the elimination or redistribution of supply chain functions to transfer less profitable activities to suppliers and to absorb more profitable activities, including direct sourcing where it is profitable/cost saving to do so (Wulfraat, 2011). Consumers are recruited as allies to force down prices in the supply chain (Greenberg, 2016). Local retailers have adopted these and other global innovations in supply chain management over the past decade. Early adoption of centralised distribution permitted Shoprite to expand market share, and late adoption resulted in Pick n Pay falling behind in the competitive race (Thomas, 2011).

This consolidation across the value chain, coupled with the investment in infrastructure is, in part a key factor as to why South Africa was an early adopter of the Supermarket model of food retail (Weatherspoon and Reardon, 2003). Supermarket penetration has been driven by both the favourable "agri-food system infrastructure" in South Africa, often enabled as part of the discussed exclusion and marginalisation of the majority, and a particular mode of value capture in the wider economy, largely through the role that the South African banking system plays in funding real estate development. At the apex of this is the development of shopping malls. As Swilling has pointed out "there is near complete consensus among those who think about our economy that since 1994, two particularly important inter-linked dynamics have shaped our economic development trajectory — namely, consumerization and financialisation. As the manufacturing sector has gone into decline, economic growth has been driven largely by consumption" (Swilling, 2021).[38]

In 1992 less than 10% of all food was sold via the large supermarket chains in South Africa. The neighbourhood shops and informal sector are where we bought most of our food in 1994. Only 10 years later, 60% of our food was supplied via the supermarkets. By 2010, 68% of all food was sold via the supermarkets (the highest in the world) and by 2017 75% of all groceries were sold via the supermarkets — the rest was distributed via the informal sector. However, without "mallification" this would not have been possible (Battersby, 2017). Retail space in 1970 was only 207,000m². By 2002 it was more than five million square metres, and by 2010, 18.5 million square metres of retail space had been constructed. The proliferation of shopping centres after 1994 resulted in 1053 malls by 2007, and then nearly doubling to 1942 malls by 2015 (Battersby, 2017).

The Competition Commission (2015) argues that shopping centre development has caused a decrease in the number of small, informal and independent retailers, and a decline in their profits and profitability (2015:3). The Commission argues that this is likely to have an adverse effect on employment, income levels and the spread of ownership (2015:4). The intersections between finance, access to capital, and perceived sites of "safe" investment are directly connected to the structure and nature of the economy. As an example, advice offered to small scale land reform beneficiaries in Stellenbosch in the early 2000s but economic development advisors contracted to the state, was that if the farmers wanted to access loans and be successful, they should enter into agreement with formal processors and retailers, often selling non-food products (such as essential oils), otherwise the advisors feared that they would fail.

The role of investment and finance in the agri-food system is a key factor. Access to finance is a critical limiting factor. Figure 71 reflects the scale and nature of investment in the South African Agri-foods sector. While this is from 2016 and it is acknowledged that changes are constant, it is used here to reflect both the consolidation in the sector, but also, and we argue importantly, the roles played by a number of banking and non-food system finance actors, such as the Public Investment Corporation (PIC), PSG, Brait and investment companies in this system.

[38] See: https://www.dailymaverick.co.za/article/2021-07-21-july-2021-zumite-sedition-and-the-emerging-politics-of-the-mall/

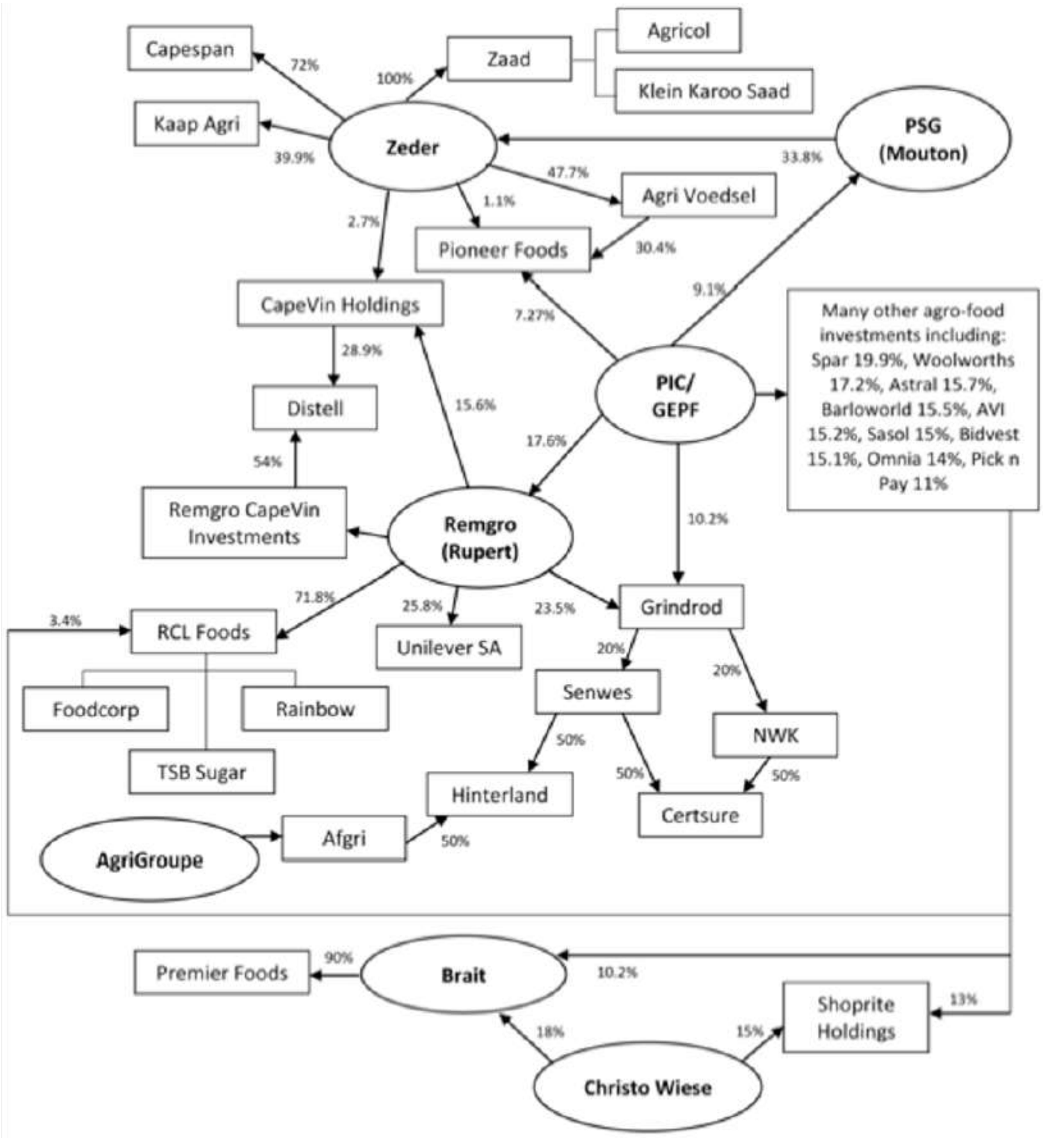


Figure 71: The South African agri-investment web, 2014
(Source: Greenberg, 2016: 32)

Modern food retail (which is taken to incorporate both large grocery and mixed retailers) was valued at R227.9bn in 2014, or 44% of the total market in South Africa. Supermarkets constituted 80% of this value, with the rest divided between hypermarkets, convenience stores and discounters (Ogando, 2014). According to Retailer News (2015), fresh produce constituted around 36% of total food retail, dry goods around 30%, beverages 20% and perishables 14%. In 2015, the five big food retailers in South Africa were also the five largest retailers across all sectors: Shoprite, Pick n Pay, Spar, Massmart and Woolworths. Between them they hold a third of the total retail market (food and non-food) (Euromonitor, 2015). The position in the rating of the "big five" might have changed more recently with the decline of Massmart, but the point remains the same.

What these consolidated structures mean is that entering into this consolidated and at times exclusionary agri-food system is incredibly challenging and for actors that fall outside the corporatized, financialised, large and formal business structures.

## 8.3.2. Conservative operating policies and governance structuring

As is evident from the preceding section, the corporate environment in which innovative food system actors need to engage is challenging, and hostile. The entire system is oriented towards a particular mode of operating, a particular class of operator, and to actors that are able to engage in such structures. Given the Cape Town focus, it is useful to use the case of informal vendors in Cape Town to better understand the constraints to food retail innovation. For this reason, it is necessary to locate this within the urban policy space, and the engagements with urbanisation. As Simone (1999) argues:

> [A]ccelerated urbanisation in Africa has produced cities whose formal physical, political and social infrastructures are largely unable to absorb, apprehend or utilize the needs, aspirations and resourcefulness of those who live within them. As a result, the efforts to secure livelihoods depend on informalised processes and a wide range of provisional and ephemeral institutions which cultivate specific orientations toward, knowledge of, and practices for, dealing with urban life. ... [The rapid and accelerated urbanisation in Africa means that] the majority of Africans live in peri-urban and informal settlements often at the physical, if not necessarily social, margins of the city.

This is the context in which many Cape Town food system innovators operate, or attempt to operate. Is this a conducive environment with such engagement and innovation? For the operator, the answer is no!

According to Statistics South Africa's (StatsSA 2022) fourth quarter 2022 Quarterly Labour Force Survey (QLFS), 3 000 000 South Africans reported working in the informal sector, up from 2,4 million in 2012 (StatsSA, 2022). Although this figure is far less than developing country counterparts, it is still 18,5% of South Africa's total employment. In the rest of the region, the informal sector is a disproportionate source of employment for women; South Africa is however an outlier - in the second quarter of 2016, 960 000 women reported working in the informal sector - only 38% of total informal sector employment (StatsSA, 2016: 2), and down from 45% in the first quarter of 2008, when the QLF survey was first introduced (StatsSA, 2016).

Of those reporting to work in the informal sector in the second quarter of 2016, 1 015 000 or 40.5% are in trade. In the second quarter of 2008, 46% of those working in the informal sector were working in trade, which is down from 53% recorded in the February 2000 Labour Force Survey (Essop and Yu 2008:46), and suggests that retail as a proportion of total informal sector employment is declining (Skinner and Haysom, 2016). Existing evidence suggests that informal retail is dominated by food trade ( Rogan and Skinner, 2017: 13). The labour force statistics are unlikely to adequately capture international migrants - especially undocumented migrants, asylum seekers, and refugees - who are largely excluded from the formal labour market and have little choice but to create their own employment (Crush et al. 2015). A 2010 survey of post-2005 Zimbabwean migrants in Johannesburg and Cape Town, for example, found that 20% of all migrants were working in the informal economy (Crush and Tawodzera 2011). Studies of other migrant groups, for example Somalis, suggest much higher rates of informal sector participation (Jinnah 2010). Although difficult to quantify countrywide, smaller scale studies suggest that informal food retail is a particularly important source of employment for foreign migrants (Gastrow and Amit 2015).

The informal sector is not isolated and/or operating outside of the formal sector, nor is it a uniform sector which can be categorised as a single system. The informal sector is a collection of many systems, operating at multiple horizontal and vertical scales. Further, the informal and the formal sectors are closely linked with mutual trade and exchanges taking place between them (Skinner and Haysom, 2016).

The 1995 White Paper on the Development and Promotion of Small Businesses was one of the first policy positions of the post-apartheid government. While acknowledging survivalist and micro-enterprises as a component of small business (RSA 1995), the paper was silent on the specific needs of these smaller players. Ten years on, a review of the impact of government's small, medium and micro enterprise (SMME) programmes concluded that 'existing government SMME programmes largely have been biased towards the groups of small and medium-sized enterprises and to a large extent have by-passed micro-enterprises and the informal economy' (Rogerson 2004: 765). At a similar time, a detailed analysis of the budgetary allocations for the informal sector across all national government departments found that although some departments had made progress towards recognising the informal economy, support measures were 'few and far between, patchy and incoherent, and largely ineffective ... the national government lacks a clear and coherent policy toward the informal economy' (Budlender et al. 2004:87). Twenty years on, many commentators suggest that support from the state is now worse that it was in the early 2000s, with emphasis being directed towards the role of the private sector in stimulating this sector (through BBBEE and CSI support) or by delegating responsibility to local government, but without commensurate budget allocations. Deeply embedded within policy positions is a distinct view that the informal economy, and newly emerging innovators seeking access to the formal economy, are at best marginal, at worst, irrelevant. These views have a distinct history.

Introducing the idea of a 'second economy', President Mbeki's 2003 address to the National Council of Provinces was a watershed moment for national informal economy policy. For the first time since the end of apartheid the informal sector was given a high profile. Mbeki conceptualised the informal economy as:

> The second economy (or the marginalised economy) is characterised by underdevelopment, contributes little to GDP, contains a large percentage of our population, incorporates the poorest of our rural and urban poor, is structurally disconnected from both the first and the global economy, and is incapable of self-generated growth and development.

The idea of the 'second economy' elicited a flurry of critique among analysts who largely pointed to the conceptual flaw of seeing the formal and informal as being 'structurally disconnected'.

The Medium Term Expenditure Strategy (MTES) is the main guide to planning and resource allocation across all spheres of government. The 2009 version for 2009-2014 committed the government to 'faster (and more inclusive) economic growth, decent work and sustainable livelihoods' (National Treasury 2009: 7). While endorsing the Second Economy Strategy, the MTES focused on one element – the expanded public works programme, and by 2015 no mention was made either of the second economy or the informal sector (National Treasury 2015). This remains the case.

The National Development Plan gives particular primacy to small business, targeting 11 million jobs by 2030 and arguing that 90% of these new jobs will be created by SMMEs. Depending on the scenario, the plan projects that the informal sector will create 1 171 000-2 090 000 jobs. But the NDP says little about how existing informal sector operators will be supported, nor how existing barriers to entry will be eliminated to generate new jobs (NPC, 2012).

In May 2014, the President announced the establishment of the Department of Small Business Development (DSBD) as a response to the NDP's focus on small business.

Even before the DSBD was established, it was clear that national government was keen to regulate the informal sector and in 2013 it released the Draft Business Licensing Bill (DTI 2013), seeking to impose further licencing and compliance related conditions. More recently, more xenophobic undertones around business registration have also emerged.[39] The draft Bill specified that anyone involved in business activities – no matter how small – would need a licence. Foreign migrants could only be licensed if they first received a business permit under the Immigration Act 9 or a refugee permit under the Refugee Act (Skinner and Haysom, 2016). Business permits have to be applied for in the country of origin and are only granted if the applicant can demonstrate that they have R2.5 million to invest in South Africa. Few, if any, of the cross-border traders and migrant entrepreneurs currently operating in South Africa's informal economy would qualify (Skinner and Haysom, 2016).

In mid-March 2014, the DTI launched the National Informal Business Upliftment Strategy (NIBUS), the first post-apartheid nationally-coordinated policy approach to dealing with the informal sector. NIBUS has two key delivery arms - the Shared Economic Infrastructure Facility (SEIF) and the Informal Business Upliftment Facility (IBUF), tackling infrastructure and skills deficits respectively, this was the first time the

[39] See: https://www.timeslive.co.za/politics/2024-04-18-watch-spaza-shops-need-to-be-audited-and-pay-tax-motsoaledi-on-new-immigration-proposals/

DTI has explicitly focused on the informal sector/ economy/business (Skinner and Haysom, 2016). National government is tackling two critical needs – infrastructure and skills development. However, the policy has a few concerning elements:

1. the policy targets 'entrepreneurial activities in the informal economy'; and
2. 'business upliftment' targets entrepreneurial activity in the informal economy.

Combined, the emphasis on 'graduation' to the formal economy, these elements run the risk of 'picking winners' and neglecting the majority.

When engaging city specific activities, Cape Town strategies are perhaps less draconian, so no operation clean sweet or active sanctioned programmes of removal, but rather follow strategies and actions that reflect more systemic exclusion, exemplified by allocating only 410 street-trading bays in the whole inner city (Bukasa 2014) and ongoing harassment of traders throughout the city (Schroeder 2012). Although the policy environment differs in different parts of the city and between different segments of the informal economy, the modernist vision of a "world-class city" with its associated antipathy to informality dominates, and informal space and activity is pathologized (Skinner and Haysom, 2016).

Analysis of the national, regional and local policy environment for informal operators in South Africa shows that it is, at best, benignly neglectful, and at worse, actively destructive, especially for foreigners. This paper has shown that the informal economy is a vital, if not the main means by which the poor in South Africa attain a measure of food security. While the focus has been on the informal sector specifically, very similar constraints and restrictions apply to more formal small scale businesses attempting innovation.

If policy approaches do not formally recognise the importance of the informal and small scale sector, the negative consequences will not only be shrinking employment and greater reliance on a resource-poor state, but growing food insecurity, manifesting in the short, medium and long term, and placing extra burdens on the state and society.

There are a number of factors that perpetuate the pothologisation of the informal food retail sector, and a distinct desire to dismiss small scale innovation. Not only is the sector marginalised in policy, a number of factors where policy is benign or silent on the sector means that the enabling environment for innovation is not optimised. Young (2019) applies a governance matrix to assist and highlight how various forms or modes of governance combine to marginalise this sector. This is detailed in Table 7:

| | | Actively target informality and small scale | |
|---|---|---|---|
| | | Yes | No |
| Impact | Desired effects | Direct governance | Indirect governance |
| | No effects | Failed governance | Absent governance |
| | Undesired effects | Counter-productive governance | Accidental governance |

Table 7: Modes of Governance
(Source: Young, 2019)

When the approach to informal sector and small scale innovation related governance  and policy in Cape Town (and as a result the wider South Africa) is overlaid with the governance approaches detailed in Table 7, the spaces where these governance oversights or omissions are evident become increasingly clear. For ease of engagement and to enable a reflection across governance and policy prescripts, Figure 71 locates these modes of governance on a matrix. This matrix is then used in Figure 8 to demonstrate where the different modes of governance can be located, specifically in terms of both forms of governance and the effects. Figure 71 demonstrates the absent utility and relevance of most policy actions. More challengingly, but perhaps understandably, global agreements, regulations and targets fall within the same problematic governance domains.

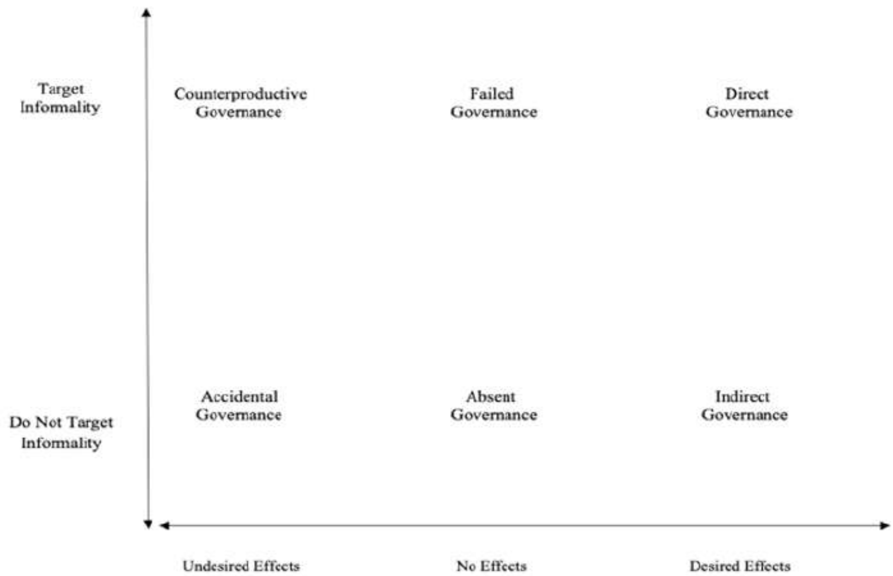


Figure 71: Modes of governance as reflected on a matrix detailing targeted or non-targeted aspects of informality and policies that focus on the desired effects.
(Source: Young, 2019)


Figure 72: Governance modes with South African and Cape Town policies overlaid to demonstrate impact.
(Source: Young, 2019)

What is clear from Figure 8 is that despite a raft of policy actions, some of which target informality, while others target small scale innovation, these generate limited and at times even negative effects. In additional there are a number of policies that do not focus on informality and the end result is undesirable effects. This is a clear factor that reflects how innovation is stifled. This aligns with the wider positioning detailed earlier, specifically a view that sees the informal sector as a "second economy" but also one that seeks to migrate the informal to a more formal economy, through "graduation". Clearly neither ideological positions are having an impact.

There are other factors that further hinder innovation, these include poor state integration, both between levels of government and across government departments and the fact that governance is incoherent, ad hoc and unplanned (Young, 2019). In the city of Cape Town, one department is advocating for improved infrastructure for vendors, with sanitation and storage facilities, but another, in designing these facilities, does this in a manner that is of no benefit to the vendors. Further, there exists a context where vendors are subjected to poor policy design and flawed assumptions resulting in limited or no alignment with informal vendors' priorities. Interestingly these governance approaches are not unique to Cape Town and mirror those in global governance domains which, like Cape Town seek to promote formalization, but are poorly defined or inconsistent (ILO, NUA, AU Agenda 2063, World Bank), and they are poorly incorporated into SDGs and other related structures, including the ICESCR, despite these being invoked frequently in policy claims (Young, 2019).

In the South African case, the Constitution provides protections and rights, it outlines governance competencies but these are not used to unlock opportunity or innovation. There are expanded protections in the NDP and in the broad based black economic policy frameworks. NIBUS, the strategy designed to enable informal sector growth and development sets out lofty aspirations but as a result of the limitations discussed previously, this does not amount to action.

### 8.3.3. Policy naivety and hubris

While the preceding section offered significant detail on the failure of policies targeting informal vendors and small scale innovators and failed governance, the next section engages, through a food related, but non-food specific, case to demonstrate that innovators and small scale innovators are further marginalised by other support structures put in place to support the state, and by extension, society, in efforts to enable a more equitable and diverse economy.

As is clear from the preceding section, there is extreme policy naivety. However, not only do innovators need to navigate this hostility, the ability to engage, should innovators wish to do so, with the formal economy, is often mediated through multiple "glass ceilings". Here we detail one such ceiling, one where the ceiling is imposed through policy structures that have failed to effectively understand how the South African business elite function, their networks and structures and operating principles.

As a result of this failure, policies that are indented to be pro-poor are in fact anti-poor, entrenching marginalisation and service a class of operator, and business, never intended to be serviced by the policy and approach.

One of the key tools that the state chose to use to address the skewed levels of participation and the extreme inequitable share of the economy was first Black Economic Empowerment, which focused almost exclusively on ownership, and later a more expanded approach to this, the Broad Based Black Economic Empowerment (BBBEE). BBBEE saw the South African state, incentivising the formal business community to play a role as active partners in supporting the state in their development of a more non-racial and inclusive society. Critiques that this was effectively asking the wolf to guard the hen house were true.

It is important to be very clear. This is not a critique of the notion of affirmative action, of redress and the need for all actors in society, specifically business, to transform. As a principle, and in the absence of more proactive and direct measures, the concept of BBBEE is 100% supported and essential in South Africa.

However, what BBBEE failed to grasp was the entrenched and deeply classist, and racial, positions that BBBEE legitimised through policy.

South African business is exclusionary both by design and ideologically. The issues around ideology are beyond the scope of this report but the manner in which South African businesses enforce exclusion and restrict the access of small scale businesses to the wider economy is evident through how BBBEE is applied and operationalised in South Africa, and particularly in Cape Town.

Different sectors of the economy formulate sector charters which then allocate a certain percent score, and a grading system associated with specific areas of transformation, from ownership to corporate social investment, to transformation oriented procurement. Businesses are then rated in accordance with their performance in accordance with these ratings and targets. The higher the rating, the greater ease businesses have in engaging the state. This also comes with a significant PR profile, effectively marketing the extent of transformation of a business through their BBBBEE Rating.

Here we wish to focus on the transformative procurement element. This is different to the ownership component of. The BBBEE score. Ownership often entails the purchase of or a process where the acquisition of a share of a business is enabled. A Criticism of the ownership element of the BBBEE (and specifically earlier BEE) approach is that it has three results. Yes, it transfers ownership to previously excluded black owners. However this ownership often entails the transfer of debt from white business owners to black business owners. This relieves business owners of debt obligations and enables the liquidation of investments, which are frequently then moved offshore and are no longer productive in the South African context. Second, the black debt is often financed through dividends and or share options. This means that the new business owners hold significant risk and carry onerous debt obligations. As a result ownership is in no way liberating. Given that the businesses are often the vehicles through which the debt is financed, through dividends, etc. the black business owners need to be far more conservative than their earlier white owners. What this does is that innovation is restricted, risks are minimised and often the businesses stagnate. Then the ability to innovate not just from a mode of practice perspective, but also from an operational restructuring perspective, is curtailed. Conservative who run businesses become even more conservative black run businesses. This is in part an explanation for the stagnation of the South African economy. Black business operators and business "owners" who could be driving radical transformation of the South African economy cannot do this. Further, as ownership shares seldom mean complete ownership, and in most instances just over 25% ownership. When these minority shareholders have to engage overly conservative board and shareholder structures, their ability to support innovation is further curtailed. The third factor is that the other participants who benefit are the financiers who facilitate the transfer of ownership, who benefit internally from the clearing of debt but then again benefit from the re-assignment of debt to others.

The other approach was to transform supply chains, to encourage the establishment of a raft of innovators and entrepreneurs who would transform the supply chains across sectors. The original intention of this was that it would assist the state in transforming the economy. Many of the earlier mentioned SMME support policies were aligned to the assumption that there were a raft of small scale businesses and innovators waiting to enter the formal sector and start supplying the formal South African economy.

If the imagined raft of entrepreneurs ever existed is a question but those that have sought to engage, have been systematically edited out of the economy.

The main reason for this is that conservative, predominantly white run businesses often fail to understand the business needs and challenges of innovators, start-up businesses or informal operators. Most businesses assume access to administrators, finance and support systems are in place. The assumption is that the innovator "looks like them and acts like them". These assumptions are locked in standard operator procedures, obligating administrative staff within the businesses to act in a similar manner. Perhaps the most discussed example of this is the case where large retailers insist on paying small scale operators 90 days from the date of receipt of an invoice. Small scale businesses seldom have this level of cash flow and can't fund either staff or input costs for such an extended period of time. The end result is that for businesses who can survive such punitive payment approaches, either the quality of the product declines or staff shortages means that service declines. Most businesses fail before their product is able to build some level of acceptance. Further the small scale nature of a business is seldom considered when contracted by a larger entity. Some products sold are bespoke and desired as a result of their uniqueness, However when attempting to sell a more generally available product, such as foods, or processed foods, larger entities demand consistent and regular supply. A case was tomatoes purchased from a hotel by a small scale farmer. The hotel demanded a specific type, quality and size, and demanded this throughout the year. This demand could never be met given factors such as seasonality, land size, etc. The assumption by the purchaser that the small scale supplier could operate in a similar manner to some of the larger national and even regional suppliers, and expecting them to do so, at the risk of denying business access, reflects some of the challenges.

What this requires is significant innovation in operating processes, rules, policies and modes of engagement on the part of the formal business. This is not the fault of the small scale innovator. Rather the failure of the larger corporate structures to see small scale innovators as different, the inability to engage with them in different ways and to actively support a different approach to innovation support has meant that the South African economy has been unable to launch, with power and market share further concentrated in the hands of a few.

This factor is compounded further in the role and manner in which relationships in South African business are entrenched. An example is a purchaser who procures meat from a butcher for function at a prestigious wine estate in the region. On the morning of the event, the client calls to advise that there has been a market increase in the RSVPs and a further 50 guests are expected. This is Saturday morning, the orders for the event have been placed and the chefs have already started to prefer the meal. The buyer calls the butchery owner and begs for assistance, The owner complies and personally delivers the additional order after having collected staff to assist in completing the order and then open his factory to ensure that the reputation of the wine estate is maintained. This transaction entrenches an expectation of continued business from the butcher, a form of PR, but also a sense of obligation on the part of both the chef and the buyer. These relationships are further entrenched through gifts at the end of the year from the butcher and a reluctance to challenge price increases and by the buyer. The chef may even overlook occasional quality issues, reusing items in different ways. This entrenches a mode of operating that is very difficult to undo. When viewed through certain lenses, this is corrupt, a form of capture. Others will argue that this is simply how business is done. Regardless of the position on this, there is no way that a small black run innovator will dislodge that relationship.

In order to navigate around both the business operating mode and the practices of "white monopoly capital" (a term used to reflect the role of entrenched supplier purchaser and corporate relations long before Bell Pottinger used it) the BBBEE regime around affirmative procurement sought to use facilitators to encourage small and emerging businesses to comply with and "be more like" corporate entities.

This saw the proliferation of many enterprise development agencies (EDAs). These agencies captured the funds that corporates had allocated to the affirmative procurement component of their BBBEE obligations and served as intermediaries between the BBBEE rated corporate and the entrepreneurs or innovators. There has been some success and the EDAs have been able to integrate some innovators into the system. How successful these EDAs have been in the agri-food sector is less clear. This is not a critique of the EDAs. The EDAs are simply being innovative themselves, filling a need.

Where EDAs do require serious critique, along with the corporates, is where they also try to capture the CSI funding. Here some EDAs establish non-profit entities that then subcontract a formal EDA business, to support further enterprise development work and CSI work. Often the non-profit and formal EDA are linked.

Most problematically though is that the EDAs often respond to the corporate need, moulding a select group of innovators into willing and compliant suppliers to their clients. Yes, this unlocks opportunity, but it doesn't transform the economy.

At the core of this, what the outsourcing of affirmative procurement funding and activities does is it prevents the corporate from having to introspect. It prevents the corporate from changing their own operating processes to be more inclusionary and transformative. It retains the hegemony and it fails to enable transformation.

Opening up opportunities for emerging entrepreneurs to access corporate supply chains is one of the most useful ways in which local economic development. However, to do this, certain factors require consideration. Supply chain transformation and innovation support requires leadership, hard work, and changes in approach. Leadership, facilitation, communication, mentoring, are essential. It also requires clarity on terms of service standards, it requires significant payment reforms, smaller contracts, quick-wins, and for the staff, it is only possible if there are reforms in staff key performance indicators (KPIs) and associated consequences for not performance (Ashely and Haysom, 2009).

Sadly, most businesses in the agri-food chain in South Africa, and in the Western Cape, either don't have the capacity or the desire to do the above. As evidenced in the role of the EDAs, businesses who can prefer to outsource this. This hubris is a key inhibitor of innovation.

## 8.3.4. Exclusionary, curtailing and anti-competitive modes of operating

Given the modes of operation, the nature of business and the hubris detailed above, it is easy to say that business operations are exclusionary. The extreme of this is price fixing and collusion so as to ensure profit maximisation and the exclusion of new entrants, or competitive actors in the agri-food system. Perhaps the best known of these practices was the bread price fixing case brought against major suppliers and processors in South Africa, and the associated ruling against these entities by the competition commission.

While the competition commission seeks to regulate these practices, other practices, while it may be argued are not anti-competitive, are exclusionary.

An example of this is in the mode and function of fresh produce markets in South Africa. It is appreciated that these markets are designed to enable the sale and distribution of agriculture from large producers, the requirement that products brought to the market need to be graded, cleaned and packaged excludes a number of growers. Yes, fresh produce markets have created alternative market streams that serve small scale producers and actors, access to these sites and spaces for trade come at costs. Whether these costs are similar to the costs incurred by the larger producers, and whether the larger producers are being enabled while others are constrained, is yet to be pursued, the actors who engage this space, complain of exclusion. The same applies for those wishing to purchase produce on the market floor at the fresh produce markets. Often these actors can see that the price of such produce is competitive and in their interests but the volumes that have to be purchased mean that small scale operators have to work through intermediaries and as a result cannot get the same price.

The result is that these higher prices are factored into the price of items sold to the consumer. If the consumer cannot afford this price, often the small scale operator then has to reduce margins, impacting viability.

A further case of exclusion can be seen with compliance with corporate vendors sign on processes. Here corporates are required to ensure that their suppliers are compliant and in order to do so, require onerous tax declarations, business registration details and others. These vendor applications assume a specific type of supplier and exclude a large number of both informal and small scale innovators. While compliance to national tax and legal requirements is appreciated. The manner in which these compliance requirements are applied across all typologies of vendors demonstrates both the reluctance of larger business entities to engage and support the new entrants into the economy, and the conservative nature of such processes.

At times exclusion is more direct and deliberate. In a personal case, while seeking to integrate small scale black businesses into a tourism business, opportunities where supplier contracts were lapsing were reviewed and while the same supplier was used in other outlets, one outlet where the supply contract with the main supplier had lapsed was used to support a black entrepreneur. The contract was in place because the original supplier had supplier infrastructure. The supply and installation of the infrastructure was funded but the supplier. However, in accordance with the contract, the cost of this infrastructure was included in the unit price of items ordered. As an incentive to continue supply, after the initial contract, the infrastructure costs would not form part of the procured unit costs. We costed to end the contract at the end of the first phase of the contract and instead made use of a new small scale black business. The outlet excluded from supply by the larger supplier was the only outlet where the contract had expired. We are also clear that the removal of this outlet placed no risk at all on the other supply contracts as the small scale operator was not able to supply on that scale.

In response, the large operator launched an aggressive multi-pronged attack, demanding that the contract be extended. This attack involved threatening to downgrade our supplier status, meaning that if there were raw material supply constraints, the other five outlets would possibly not be supplied. Further, they requested a review of existing contracts claiming that the prices offered for supply across all outlets had factored in the sixth outlet and now all prices needed to be re-negotiated. The final attack was to threaten a strategic litigation case (SLAP suit) against a number of people in the business, myself included. This use of the SLAP suit is not unlike cases brought against environmental activists. These threats of SLAP suits were targeted at individuals in their personal capacity.

The fact that the outlet was removed from the wider agreement, for which contracts were still in place and for which we had no intention of withdrawing or not continuing once lapsed only amounted for 5% of the total supply. Unbeknownst to the aggressive supplier, our business was part of a wider collection of holdings. The corporate head office replied to the legal and related threats saying that they noted the suppliers position, were disappointed that they were actively prohibiting transformation, and as a result, no longer met their supplier criteria and as a result, would have to cancel the contracts across the wider group. Our business represented less than 3% of the group holdings and a cancellation of contracts would come at a significant cost to the supplier. The supplier withdrew all threats. However, the fact that a supplier of a large business in South Africa acted in such a manner to the loss of a negligible contract raises questions about entitlement and the nature of business, not just from a transformation perspective, but also, in terms of the modes of practice, and the business ethic.

Exclusion in the food sector is also evident in formalised and accepted practice. Perhaps the most evident of these is the insistence on a bar-code on one's packaging, purchased through a council whose membership included the very outlets that will sell most products. While the need for traceability and compliance is fully appreciated. The use of such measures raises interesting questions about how exclusion works and how innovators are prevented from participating in the formal sector. The case in point is the Consumer Goods Council of South Africa (CGCSA). This is a private sector membership body that offers member value through the provision of services that include:[40]

- Product labelling advisory
- Global standard barcoding and trusted data management
- Regulatory advice and advocacy
- Sustainability guidance and advisory
- Food safety, food quality and food waste advisory
- Crime risk management, trends analysis and best practice
- Skills development and training
- Industry representation through media engagements
- Consumer awareness
- Facilitation of non-competitive industry collaborations
- Sharing of best practice standards for the industry
- Engagement with government departments and regulatory agencies

While this is detailed largely as advice, the extent to which non-aligned members are able to access this body, are able to ensure compliance with the above aspects and are excluded from the body stipulated conditions is unclear. Further statutory board members of the CGCSA include representatives from major food retailers, processes and distributors as well as packaging and beverage companies in South Africa.[41]

[40] https://www.cgcsa.co.za/about-cgcsa/

[41] https://www.cgcsa.co.za/about-cgcsa/statutory-board-members/

Often innovators encounter a number of such constraints and exclusionary practices at the same time. Operating in this context presents significant constraints to innovation and are seldom actively discussed when discussing innovation and small business operations.

### 8.3.5. Spatial inequities

To assume that operators in Cape Town have the same access to services and opportunities is a deeply flawed view. The recent taxi strike and the differentiated impact of the strike across businesses clearly demonstrates how the historic and even current spatial inequalities in the city impose further constraints on operations is a significant reason for innovation being curtailed and restricted.

Cape Town is widely considered to be South Africa's most segregated city. Cape Town's social composition and fractured spatial form bear the strong imprint of its colonial and apartheid history. For three centuries the city was managed to favour a privileged minority at the expense of the indigenous majority, based on the colour of their skin (Turok et al, 2021). Between 1948–1994, racial discrimination was taken to extremes as the apartheid regime forced different ethnic groups to live in separate places, with different institutions and infrastructure. This was supposed to prevent inter-racial contact under the pretext of 'separate development' (Turok et al, 2021). National laws governing the economy, society and built environment systematically favoured white households and disadvantaged blacks. The result was that race became synonymous with socio-economic status (or 'class'). Whites became increasingly better-off than Indians/Asians, followed by coloureds and then black Africans (StatsSA 2019). policies were abolished in 1994, but many scars remain. Gaping urban inequalities continue to impact people's well-being and life chances. The subjugation of blacks was so far-reaching that efforts to undo the damage have had muted effects (World Bank 2018). Economic growth and state-sponsored affirmative action have done little to erase the social and spatial divides. Social class continues to be intertwined with race, even if the relationship is less direct than it used to be (Turok & Watson, 2001; Turok et al, 2021).

Cape Town was extremely spatially divided by occupation in 2001. The dissimilarity index values imply that 67% of residents in the top occupations in 2001 would have had to move in order to achieve an even distribution of top and bottom occupations across the city. The equivalent number in Johannesburg was only 48%. This is a huge difference between the two cities, with Cape Town far more socially segregated than Johannesburg (Turok et al, 2021).

This exclusion plays a significant role in how innovation, and access to opportunities in the agri-food sector is enabled or curtailed. Space matters, place matters. Both work against small scale innovators who need to work far harder, and carry far greater costs than their competitors.

### 8.3.6. Funder Challenges

An often overlooked limitation to innovation in this sector, are the funding requirements or restrictions relating to specific projects. Based on experience of working on various projects, the authors can reflect on how innovation can be inhibited due to meeting these specific funding regulations.

For example, in Cape Town, the local government is only able to fund formal business, which ultimately excludes a significant number of entrepreneurs who are working in the informal sector, many of whom work in the agri-food value chain. While there are some ways in which the state can find 'loopholes' to enable greater access to funding for innovation, this is likely to require significant agility from the state, which could have unintended consequences such as corruption and mismanagement.

It is not only the state who is limited in their ability to fund informal innovative projects, but also private businesses. In one case, a project which aimed to conduct a study on informal food traders was not able to be funded due to the funder not being allowed to fund "illegal" activities. Because the informal sector is often reduced to "illegal" activity by policy makers, entering the market as an informal sector entrepreneur is restricted.

Perhaps the most common example for the authors is that of working with universities. For example, in order to become a vendor at the University of Cape Town to provide a service, businesses have to have a VAT number and a tax certificate. This means that the university is unable to recruit informal catering businesses, for example, for university events. This adds a further barrier to entering the market even on an ad hoc basis.

The limitations and requirements imposed on funders should not be overlooked when assessing the limitations to innovation in the agri-food sector in Cape Town. Addressing this subtle and sometimes invisible barrier can be pivotal in enabling greater access to the market for informal sector entrepreneurs.

## 8.4. Opportunities

Given the multiple and often mutually compounding limitations, opportunities are significantly curtailed. However, there are a number of areas where possible opportunities for innovation can be facilitated.

One key area of opportunity is less an opportunity for innovators but a need that would potentially unlock innovation. A key challenge detailed above is the framing of two economies, one formal (and good), another informal (and not good). This first and second economy logic maligns sites of potential innovation before these have even begun. The food and wider agri-food economy is diverse, it is dynamic, and most importantly, it is responsive to the needs of everyday realities in different contexts. Often innovation is site specific and if these innovations hold merit, they are then amplified further across a wider group of society. At a broader conceptual level, we propose engaging innovation and sites of innovation through the lens of a continuum. What this means is that it is essential that a small vendor selling vetkoek on the side of the road, or a small scale processor, is not seen as being the same as an informal shebeen with direct supply links to major alcohol distributors. Following the same binary, one may need some health and safety permitting, but the shebeen would require a raft of further compliance related aspects from liquor licences to venue design compliance issues. The notion of an agri-food sector continuum enables a wider understanding where questions of specific need and compliance aspects associated with this, and the associated costs, can be reviewed in a more targeted manner. From an innovation support perspective, the concept of a continuum also enables far greater targeting in respect of how spaces and places are used, as well as the infrastructure requirements. Clearly a vendor selling from a bucket has very different spatial and infrastructural requirements when compared with township specific butchers, braai stands and spazas, with equally different needs when compared with a lifestyle market, a wholesaler or a supermarket, and different needs to a platform related food retailer.

This concept of an agri-food continuum is detailed in a stylised manner in Figure 73 below but depicts variation, permitting and support variations, scales of vulnerability, but also draws attention to the diversity of infrastructural needs. The agri-food continuum is diverse so Figure 73 has reflected only the food retail and supply elements of the continuum.

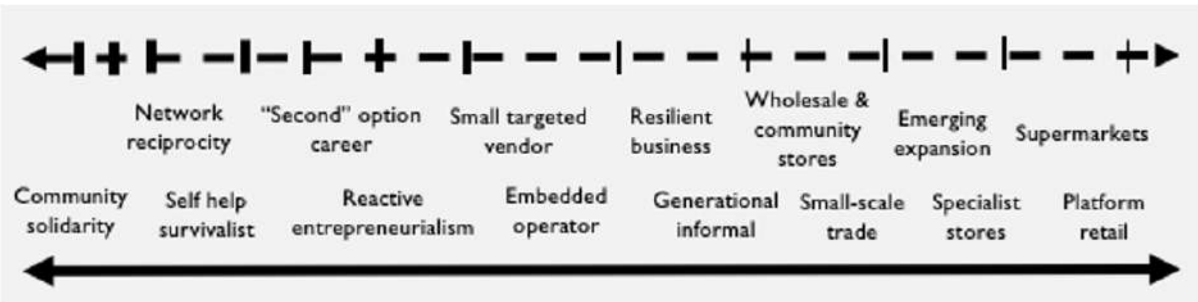


Figure 73: Stylised view of the retail continuum with innovation and support needs differing across the continuum (Source: Authors own depiction)

A further area of opportunity and one that is perhaps most challenging is in policy and support innovation.

There are a number of small business support mechanisms facilitated by both the private sector, often as mentioned, through impact incubators and enterprise development support specialists. There are also development agencies tasked by the South African state to facilitate the potential emergence of the entrepreneurial sector. As detailed above, often private sector support processes are not necessarily targeted correctly, and often need to focus not on bottom-up innovation, but on already established innovators who show potential where there is viable potential for scaling. A similar logic is applied through the state driven options. These are at times bureaucratically restrictive with multiple hoops to navigate, given that South African taxpayers fund the state, these agencies are xenophobic in their positioning and assumptions of clients. Engagement demands a great deal of patience. Anecdotal evidence suggests also that other challenging conditionalities are attached to such state funding and support, such as calls for partnering, product change and enforced shifts to processes unfamiliar to the innovator (such as an insistence that the producer move from vegetable production, known by the producer, to essential oils, if support was going to be provider), or even "shareholding requests".

A different approach to innovators and entrepreneurial support is needed. Firstly, the recognition of the diversity of agri-food system typologies is essential. While not all retailers depicted in Figure 73 can be supported, and some do not need support, the typology variation does require greater attention. Some come with greater risk. Currently, it is suggested that the approaches to innovation support are overly conservative, engaging a small elite group of innovators, those who can demonstrate scalability and potential, and this misses a significant group who, with a different approach, could hold potential. Relatedly, often the innovators in the "ignored segment" may not need entrepreneurial support processes but other support, such as access to credit, access to appropriate infrastructure, access to suppliers, etc. which are better enablers of success than a focus on the operator.

One of the greatest sites of opportunity comes in the form of policy reform. Not only is the second economy framing deeply problematic and maligns a large component of potential innovators from the outset, the structure and operationalisation of legislative conditions is a significant brake on innovation. As detailed in Figure 72, even when the government targets operators along the agri-food continuum, their approaches are flawed. It is appreciated that the state faces significant challenges and not only needs to be fair in terms of how policies are applied, they also need to adhere to multiple legal and administrative requirements. This should however, not be used as an excuse. Given the high levels of joblessness, the youth demographic, and the increasingly informal nature of Cape Town's settlements, a deep reflection in the approaches to, and support mechanisms required, to service the agri-food continuum are required. This cannot be left to the Enterprise and Investment Department alone. Alignment between the obligations imposed on, for example, public health, community policing, national trade rules and product prescripts, mobility, spatial planning and urban design, require significant reconsideration and review. Surely the flaw in seeing transit interchange design as being the responsibility of the transport department only is deeply flawed? Equally flawed is said department's reluctance to engage other actors. As Cape Town evolves and grows, in a manner that does not reflect a Eurocentric city, policies and bylaws that aspire to such Eurocentric imaginations require rejection.

As important to entrepreneurs and agri-food and food system innovation is policy innovation.

Multiple other opportunities are possible, from changes to how formal enterprise engages emerging innovators, demands and even legal requirements for local content (with aligned support to enable such content), novel financing means, celebrations of failure as opposed to an obsession with success, are all areas where opportunities can be found. These innovation opportunities are generally innovator or site specific. While perhaps naive, it is argued here that food and the agri-food system offers a lens to interrogate multiple constraints on innovation, but at the same time, if the agri-food innovation landscape is viewed as a continuum, and policy actors let go of overly conservative, and at times prejudicial, orientations to the bulk of innovators, a great deal more opportunities will emerge.

### 8.4.1. Conclusion

In South Africa and in Cape Town the dominant trend is to "resort to ad-hoc interventions of a 'sanitising' character with devastating consequences for the urban poor" (Kamete and Lindell 2010, p. 890). The core narrative is of the pathologisation of the informal economy which triggers an array of 'sanitising' policy measures for its pacification (Kamete 2013: b)." (Rogerson 2016).

In South Africa, between 1990 and 2008, there was a 76% decline in the number of farmers in the country. For maize there are approximately 9000 farmers (Smallholder and commercial) nationally. Eighty five percent of the grain storage capacity is held by 22 silo owners. Seventy three percent of market share is held by four companies and for wheat, there are 5000 to 6000 farmers. Four main wheat millers control 87% of the market. Most of the major mills are integrated with plant bakers. For milk, approximately 5000 dairy farmers supply only 13 milk buyers, of which the four largest process around 65% of total commercial milk delivered to dairies. Of these four, two are also price leaders. For broiler chickens, two main producers produce 50% of broiler meat in the country and for eggs, three main companies produce 51% of all eggs. The largest produces 32%. Agro-processing in South Africa is dominated by large companies, with the ten largest producing 52% of all packaged food sold in South Africa. This concentration is far greater than the global average of 26%. Large agro-processing businesses (>R50m per year) account for 91% of all income and 75% of all employment in the sector. Micro-industries (less than R5m per year) account for 1.4% of all income, but 6% of all employment.

These figures demonstrate the scale and extent of consolidation. When read with the other factors, including conservative operating policies and governance structuring, policy naivety and hubris, exclusionary, curtailing and anti-competitive modes of operating and spatial inequities, one cannot help but wonder why an innovator would seek to engage in the agri-food supply chain.

However, as demonstrated, this is essential and far greater effort is needed to address the significant and entrenched equities in South Africa and Cape Town. Not only is a radical reworking of policy needed, so too is a significant reassessment of the roles, modes of practice, and ethos of South African business and particularly its food system actors required. Additionally, it is not long before the social compact entered into between society and the state fractures. This was seen in the invasion of malls recently but took place on a far greater scale during the KZN riots in 2021. These aspects present a significant risk to society as a whole, where far more is at stake than a few percentage points of a supply chain. Required is a fundamentally different ethos pertaining to both society and business practice. Transformation is essential and unless proactively pursued, and pursued soon, the threats of market creep as a result of innovation will be the least of our worries.

A Cape Town backyard garden
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

Cape Malay Spices
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

# 9. Urban Food Environment

## 9.1. State of food environment

The urban food system refers to the process by which food is produced, distributed, consumed and turned into waste within a city. It includes all aspects of the food system from production and distribution to retail, consumption and waste. The urban food system is complex and dynamic, involving a wide range of actors and institutions, from small-scale farmers and informal food vendors to large-scale retailers and government agencies.

The urban food system can be conceptualised as a set of interrelated subsystems that work together to provide food to urban populations. These subsystems include production, processing, distribution, retail, consumption and waste. Each subsystem is interconnected, and changes in one subsystem can affect the others.

The production subsystem of the urban food system includes all activities related to the cultivation, harvesting, and processing of food. This can include small-scale urban agriculture, such as rooftop gardens and community gardens, as well as larger-scale agriculture in peri-urban areas surrounding the city. The production subsystem also includes food processing, such as canning, freezing, and packaging.

The distribution subsystem of the urban food system involves the transportation and storage of food from the production subsystem to the retail subsystem. This can include large-scale distribution networks, such as wholesalers and distributors, as well as informal food distribution networks.

The retail subsystem of the urban food system includes all outlets where food is sold to consumers. This can include large-scale retailers, such as supermarkets and hypermarkets, as well as informal street food vendors and markets.

The consumption subsystem of the urban food system involves the individual and collective food choices of urban residents. This includes the types of food consumed, as well as the quantity and frequency of consumption. The consumption subsystem is influenced by a wide range of factors, including cultural norms, income, and access to food. Access to food is significantly influenced by the food environment of urban residents.

In contrast to the urban food system, the food environment refers to the physical, economic, and social factors that influence food choices and access to food. The food environment includes all aspects of the built environment that affect food access, such as the location and density of food outlets, as well as the price and quality of food.

In the African context, this is largely influenced by the colonial legacy of many cities, where the urban poor remain located on the periphery of the city centre, and rely predominantly on informal food traders.

The food environment can also be influenced by policies and regulations, such as zoning laws and in the context of many African cities, a colonial history. In addition, social and cultural factors, such as food preferences and dietary habits, can also shape the food environment.

While the urban food system and the food environment are closely related, they differ in several important ways. The urban food system is focused on the production, distribution, consumption and waste production of food within a city, while the food environment is focused on the broader socio-economic and physical factors that influence food access and choice.

Despite these differences, the urban food system and the food environment are closely linked, and changes in one can have important implications for the other. For example, changes in the urban food system, such as the expansion of supermarkets into low income areas, could reduce the availability of fresh food due to the displacement of informal food traders as a result of this supermarket expansion.

Similarly, changes in the food environment, such as the implementation of policies and regulations towards food aware planning can help to shape the urban food system and promote more sustainable and equitable food systems.

Overall, the urban food system and the food environment are two important and interrelated concepts that are critical to understanding food access, food security, and food systems in urban areas.

### 9.1.1. Unequal Food Environments

The widely accepted definitions of food environments refers specifically to the physical, socio-cultural and policy conditions that impact on access to affordable, safe food (Kraak et al, 2014; HLPE 12, 2017; UNSCN, 2016). This definition acknowledges that the quality of the food environment within a country or city can differ. Some of these differences include lack of nutrition education and a loss of traditional knowledge and food practices (HLPE, 2020). However, while these are important dimensions of the urban food environment that can be unequal across a city, a more nuanced understanding of these differences may be required. For example, in the context of Cape Town, and many other cities across Africa, it is important to include the dimension of historical planning and policy, specifically in relation to infrastructure planning.

As is the case across cities in South Africa, Cape Town remains economically and socio-spatially segregated as a legacy of apartheid era spatial planning. This segregation seeps into various other forms of the city's functions such as unequal access to affordable food. While not immediately obvious, the city's spatial form and function has a profound impact on how residents in the city are able to access food. For example, a failing public transport system in Cape Town will have a significant impact on the way in which residents are able to move through the city, and access affordable food.

### 9.1.2. Food environments: intersection between consumer and retail

Central to understanding the intersection between the household needs, their engagements with the state (across all spheres of government and their appointed service providers) and other intervention providers, is understanding the prescriptions or policies set out by the state – the food environment and ultimately, food and nutrition -oriented, interventions that have as their objective improved nutrition (in all forms) and ultimately wellness.

However, this does not relate only to government officials with a direct health and/or nutrition mandate. Other actors engaged in interventions in specific contexts, actors (both government and non-government) that may be operating outside of a food environment mandate may have a direct impact on food and nutrition, and by extension, health, outcomes and thus require far greater understanding.

Research conducted in Cape Town (Battersby, 2011; Battersby and Peyton, 2014; Haysom, et al, 2017) has found that while direct health and nutrition interventions are of critical importance, of equal importance is how the food environment and the broader urban environment enables or constrains the attainment of health and nutrition. This means that a broader view of interventions beyond explicit food, health and nutrition is required. Food touches almost every aspect of urban governance, policy and economy, "more than with any other of our biological needs, the choices we make around food affect the shape, style, pulse, smell, look, feel, health, economy, street life and infrastructure of the city" Roberts (2002). That food and nutrition outcomes need to be essential considerations for planners and other government officials was recently affirmed by the Food and Agricultural Organisation, a body that generally drives the ruralised orientation of the food security discourse. The position argued that

> *"with the majority of people already living in urban areas – not only in large metropolitan areas, but also in secondary cities and small towns – a greater focus on urban planning as a way of influencing food systems development will be critically important"[7]*

The absence of effective food system planning and thinking more broadly is not benign, as Pothukuchi (2000) argued, "inaction in the food planning environment does not have neutral consequences, but often generates negative outcomes". For this reason, this review adopts a far broader view of the systems that impact health and nutrition outcomes, and a broader view of food environments, beyond just the relationship between food retail and the consumer.

These intersecting systems present interesting challenges for the state, particularly given their hierarchical operational structures where integration and cooperation across departmental hierarchies is a challenge (Drimie and Reysenaar, 2010).

However, it is at the urban scale where these tensions and the realities of policy silos are felt most directly. This does not mean that policy and implementation actors (officials and service providers) do not seek out ways to circumvent such tensions and operational constraints. It also means that in order to deliver on constitutional mandates (such as the Rights enshrined in Sections 27 and Section 28 of the South African Constitution) officials and service providers find ways to use specific policies and programmes to unlock delivery, while at the same time, ignoring or disregarding others. Understanding these operational strategies is as important as understanding the policy pronouncements and intentions. Understanding this "policy political economy" is essential when attempting to engage issues of a transversal nature, such as food environments at an urban scale, and suggest appropriate policy responses to counter the current poor state of food security, and health, nutrition and wellness outcomes.

## 9.2. Nature of urban planning, design and spatial considerations and its role in food environment

In recent years, there has been a noticeable increase in the number of built environment plans which consider the food environment and the food system. This is largely due to the role of the City of Cape Town Resilience Department, which undertook the task of applying a food lens to any policy documents that were soon to be reviewed. Despite the assumption that the city has no food mandate, Figure 74 below, developed by the CCT Resilience Department, highlights that the city has a clear food mandate.

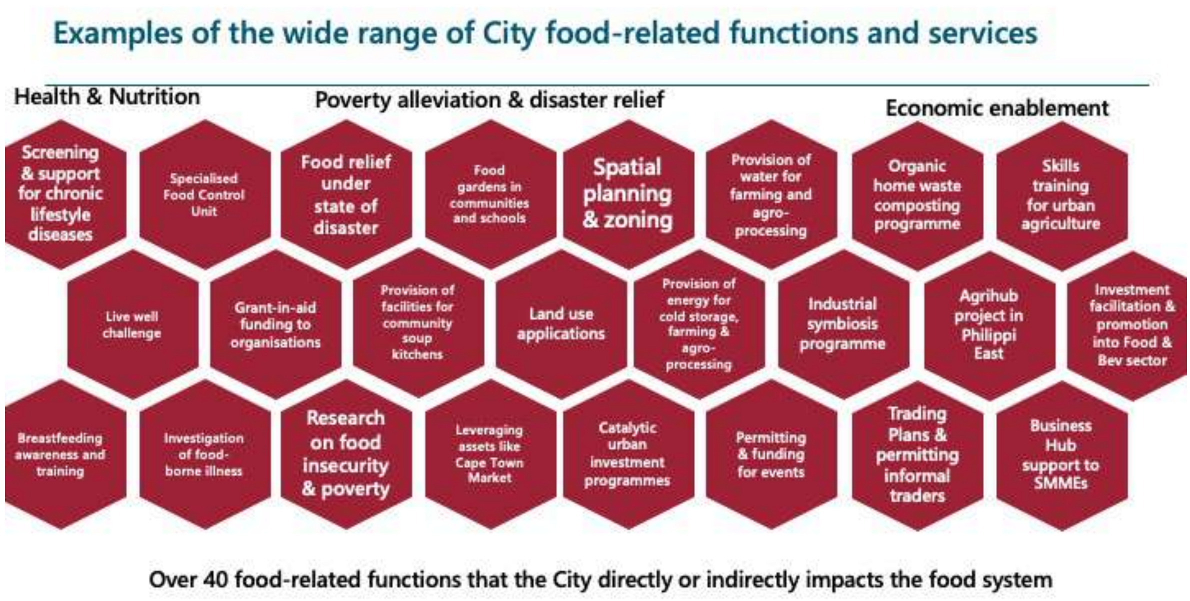


Figure 74: Examples of the wide range of City food-related functions and services (CCT Resilience Department, 2022).

Through this approach, various built environment plans in the city now include food related elements. The most significant of these plans is the City's Metropolitan Spatial Development Framework (MSDF). The MSDF is a long term strategic document that outlines the city's spatial vision for the next fifteen to twenty years. This document outlines the strategies through which the city plans to manage the current and future growth of the city. The District Spatial Development Frameworks (DSDF), provide a more detailed neighbourhood scale vision of what is proposed in the MSDF. It is the task of the DSDFs to roll out the specific vision of the MSDF at the neighbourhood scale. While the DSDF can and should include additional information and detail based on the policy statements in the MSDF, the DSDFs cannot deviate from the spatial vision and concept stated in the MSDF.

The current 2023 MSDF is based on three specific spatial strategies which are:

1. Plan for economic growth and improve access to economic opportunities
2. Manage urban growth, and create a balance between urban development, food security and environmental protection
3. Build an inclusive, integrated, vibrant and healthy city.

(CCT MSDF, 2023)

The inclusion of 'food security' in the second spatial strategy is a significant milestone for those who have been working to embed food related issues in local government policy documents. While this is encouraging, the conceptualisation of "food security" in the context of the MSDF is still rooted in notions of supply and production of food, as opposed to access. For example, a sub-strategy of Spatial Strategy Two states that in relation to food the City aims to "appropriately manage land development impacts on natural resources such as agricultural areas of significance and critical natural assets" (CCT MSDF, 2023: 15).

Although food is only directly mentioned in spatial strategy 2, all three strategies and their sub-strategies pertain to food. For example, under Spatial Strategy 1 the City aims to "promote inclusive sustainable, shared economic growth and development" (CCT MSDF, 2023: 15). By improving economic growth and increasing employment levels, residents in Cape Town would theoretically be able to afford access to a nutritious, equitable urban food system. Another sub-strategy of Spatial Strategy 1 is to "integrate land use, economic and transport activities that support the sustainable operation of the public transport network." (CCT MSDF, 2023: 15). A significant portion of low income residents' income is spent on public transport, traveling far distances across the city to and from work. This not only places a financial burden on residents, but also a time burden. This time burden places undue onus on the urban poor to not only spend money travelling, but also have less time to prepare affordable, nutritious food on a daily basis.

Finally, in Spatial Strategy 3, the sub-strategies make mention of encouraging "integrated settlement patterns" and continuing to "transform the apartheid city"". These strategies, while not directly linked to food per se, will undoubtedly have an impact on the ways in which residents are able to access food. For example, residents who currently have to travel far distances for employment, may not need to do this in future if the City is able to create the conditions for a more integrated settlement pattern across the city. This would mean less time and money spent on transport, potentially having easier access to food retail, and being able to spend saved time on preparing more nutritious meals, and saved money on other important services such as water and electricity.

While explicit mention of food in local government plans and policy documents is important, it is also important to be cognisant of the implicit inclusion of food in these documents. As is the case with many urban systems, the urban food system does not operate in isolation to the rest of the city - it is embedded in the daily functions of the city, and has a substantial impact on its form.

## 9.3. Built environment policies that relate to the urban food environment

| Document Title | Date | Department | How is food included? |
|---|---|---|---|
| Metropolitan Spatial Development Framework | 2023 | Urban Planning and Design Department | Spatial Strategy 2: Mange urban growth and create a balance between urban development, food security and environmental protection.<br><br>Sub-strategy: Appropriately manage land development impacts on natural resources, green infrastructure and critical biodiversity networks.<br><br>P18.2: Protect agricultural areas and existing farmed areas from urban encroachment, and support urban agriculture to promote food security and mitigate increased food prices.<br><br>P21: Support food-sensitive planning that supports the food system value chain, from production, processing, and distribution to access, consumption and waste management.<br><br>P21.1: Create access to land opportunities in support of urban food security interventions in spatial planning, urban design and land use processes to:<br>• protect and enhance natural resources such as agricultural land to support inclusive economic growth and food security; |

| | | | |
|---|---|---|---|
| | | | ● enhance access and availability to reduce food insecurity and address low nutrition levels amongst vulnerable communities;<br><br>● promote the creation and conservation of food security assets (including informal trading zones, fresh produce markets, community kitchens, food processing facilities, healthy food outlets, agricultural areas, urban grazing sites, food transport and processing nodes, food waste recycling facilities, etc.) as priority objectives as far as possible, in order to retain and enhance their contribution to achieving food security and local circular economies;<br><br>● carefully consider new developments in food-insecure precincts, or vulnerable subdistricts, in relation to scale, form and placement of new developments (malls, fast-food outlets, transport nodes and housing, etc.) so as to ensure that new developments do not exacerbate food insecurity by undermining existing food security assets of the precinct or landscape;<br><br>● extend and optimise trading space allocations for micro-enterprises and informal traders around transit nodes as an asset to support economic opportunities for food insecure residents;<br><br>● work to restrict the spread of obesogenic food environments by limiting development applications and trading permits of high-risk foods around sensitive sites such as schools and ECD centres;<br><br>● encourage adaptive use of food trading nodes and urban food markets to promote urban regeneration and tourism, while contributing further to the enrichment of local economies and enrich the quality of urban life; and support urban food security and food system initiatives such as urban agriculture that are linked to other economic activities, provide live<br><br>P21.2: Support access to evidence-based planning by improving data accuracy, analysis information and communication to respond to food security interventions and adopt spatial planning processes that protect and enhance food security assets, agricultural areas, viable farmed areas and horticultural areas from urban encroachment. Support the inclusion of community-generated data into the evidence-based planning that inform food-sensitive urban planning. Ensure engagement with community food forums as a means of collaboratively assessing food data and securing community inputs into City budgeting and planning cycles |

| | | | |
|---|---|---|---|
| | | | P21.5: Vacant land and other underutilised state-owned assets centrally located to food insecure communities should be made available and accessible to communities for food related activities such as urban farming, community feeding schemes, and other food production activities of community value. This could include unused land within schools, community centres and around municipal assets and will be subject to the landowner's agreement with intended users. |
| City of Cape Town Resilience Strategy | 2019 | City of Cape Town Resilience Department | Pillar 1: Compassionate, holistically-health city Apartheid, high crime rates, substance abuse, and poverty. The legacies of these challenges have culminated in a base level of trauma faced by Capetonians in all parts of society. This has resulted in a high incidence of mental health disorders – which often exacerbates the quadruple burden of disease. This pillar focuses on a more holistic approach to building a healthier city, including improving access to mental health services and affordable, nutritious food, strengthening social cohesion, and ensuring that children have the best possible start to life, with the intention of disrupting the intergenerational transfer of trauma.<br><br>Pillar 2: Connected, climate-adaptive city - Cape Town's unique geography makes our city very vulnerable to the impacts of climate change. These impacts, which can manifest as a variety of shock events, are known to be multiplied by existing societal stresses such as poverty, food insecurity and a lack of social cohesion. In this vein, the residents of informal settlements and backyards are often the most vulnerable to climate-related shock events. This pillar focuses on overcoming the spatial legacies of our divided past through partnership at all scales – community, city and regional – allowing us to enact climate adaptive measures that simultaneously build urban resilience, with co-benefits that include improved mobility, place-making and social cohesion.<br><br>Food insecurity is listed as a significant stress in the city<br><br>Action 1.4.1 Establish a food systems programme to improve access to affordable and nutritious food<br><br>Goal 3.2 Enable enterprise development in the informal economy |
| Integrated Development Plan | 2022 – 2027 | Policy and Strategy Department | Objective 15: A more spatially integrated and inclusive city<br><br>• 15.2.B Food systems project: Food security and access is an ongoing concern in Cape Town, often driven by high levels of unemployment and poverty. However, during the pandemic and resultant lockdown, the situation deteriorated |

| | | | |
|---|---|---|---|
| | | | significantly. The City will work with partners to strengthen the food system in Cape Town, including assessing how land use management and regulations on agriculture and business activities affect food production and access. The City will focus on developing appropriate mechanisms to reduce future food system shocks resulting from disaster events.<br><br>Chapter 6: Well-being<br>● Community, school and household food gardens<br>● Food relief |
| Cape Town Densification Policy | 2012 | Spatial Planning and Urban Design Department (Dissolved 2016) | Food is not mentioned in this document |
| Early Childhood Development Policy | 2013 | | Food is mentioned in relation to safe preparation of food, but not in terms of food access or feeding schemes |
| Environmental Strategy for the City of Cape Town | 2017 | Department of Environmental Management | Directive 6.7.7: The city will promote localised food production and/or urban agriculture to reduce the impact of food distribution costs and losses to improve food security |
| Food Gardens Policy in Support of Poverty Alleviation and Reduction | 2013 | | 2. Desired Outcomes<br>● 2.2. The policy sets out the criteria and procedures to be followed to establish sustainable food gardens which may act as to aid in addressing food insecurity in low income areas<br><br>4.Policy Parameters:<br>● 4.1. The policy focuses on a limited set of interventions that can assist poor people to become more food secure through food gardens as well as the mobilisation of resources and efforts towards this goal<br>● 4.3. The policy has some transversal implications as it demands collaboration between internal role-players involved in food security and all directorates implementing programmes or projects.<br>● 4.4. This policy also guides the collaboration and cooperation with other spheres of government and businesses and civil society in respect of food gardens |
| Informal Trading Policy | 2013 | | Strategic Objective 1: Plan for and Initiate Development Activities in Support of the Sector<br>● d) Develop basic infrastructure norms required per industry (such as food processing, fruit and veg, textiles, personal services,) and in relation to the limitations of the trading location |

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|---|---|---|---|
| | | | Stakeholders:<br>● I) Health Department: Issue and enforce health certificates for food traders |
| Integrated Coastal Management Policy | 2014 | | 1.1 The coast as an asset: "…supports our unique fauna and flora and contributes to the livelihoods through the provision of food" (page 6) |
| Integrated Waste Management | 2020 | | Food is mentioned in relation to defining terms such as "food waste", "garden waste" and "organic waste". |
| Outdoor Advertising and Signage Policy | 2013 | | Food is not mentioned in this document |
| Transit Oriented Development Strategic Framework | 2016 | Transport Development Authority (dissolved: 2022) | Food is not mentioned in this document |
| Vulnerable Groups Policy | 2013 | | Food is mentioned in relation to "31.8% of children in the Western Cape are living in households that experienced inadequate or severely inadequate access to food".<br><br>There are no further policy statements mentioning food in this document. |
| Water and Sanitation Services Policy | 2023 | | Food is mentioned in relation to "The Constitution further affords people in South Africa the right to have access to sufficient food and water."<br><br>There are no further policy statements mentioning food in this document |
| Youth Development Policy | 2013 | | Food is not mentioned in this document |

Table 8: An overview of relevant City of Cape Town policies that could impact the food system, and how food is mentioned (or not) in each policy.

# 10. The city's food system, examining often unseen aspects

## 10.1.Governance without mandate

An often unseen or underestimated element of the urban food system, is the role that local government planners and policy makers play in shaping the urban food system. Despite the absence of a formal mandate, local government has a clear role to play in enabling a nutritious, equitable and accessible urban food system in Cape Town. In many instances, the local government has taken on significant roles (intentionally and unintentionally) in shaping the urban food system. Understanding the dynamics and implications of the assumed lack of mandate within local government presents a rich area for exploration.

## 10.2. Value of the CT fresh Produce Market

The Cape Town Fresh Produce Market is a useful example within Cape Town's food system, through the role it plays distributing fresh produce throughout the city. However, the area surrounding the fresh produce market, and the food trade activities that take place outside the market play an equally significant role in the city's food system as the activities taking place inside the market. This site is an interesting place to begin exploring and understanding the potential for innovation in the food system based on these market activities.

Firstly, a deeper investigation into the market's role as a catalyst for economic innovation is warranted. This could include understanding how the market facilitates entrepreneurship, fosters value addition along the supply chain, and promotes technological advancements in distribution and logistics in Cape Town.

An additional layer to this study could involve assessing the market's resilience and adaptability in the face of systemic global and local shocks and stresses. These shocks and stresses include events such as ongoing international conflict, local and global climate shocks and stresses, as well as various other local and global economic shifts. Understanding how the market innovates in response to these challenges, could assist in informing strategies for enhancing resilience in local food systems.

## 10.3. Stokvels and social safety nets

Stokvels represent a form of social safety net for many members, particularly in marginalised communities. These groups pool resources, providing financial support for various needs including food security.

An area that this topic could investigate is understanding how stokvels interact with the urban food system and food environment. Particularly, how these groups navigate access to nutritious food, especially in areas with limited affordability of healthy options, can shed light on their impact on food security and dietary choices. This could also include the influence of stokvels on local food economies and their potential to foster income and employment through the food economy within the city. Research into the role of stokvels through the lenses of social innovation, social protection, collective action, and mutual support could provide insights into the consumption strategies of urban residents, and identify key areas for potential policy interventions.

## 10.4. University networks and study groups

The role of university and research groups in Cape Town is an interesting topic to investigate in more detail for two potential reasons. Firstly, there are multiple existing food systems research groups in Cape Town; however, these groups are often working in parallel to one another. Working more efficiently, and partnering across these networks could prove to be a more productive way to conduct research on the urban food system in Cape Town. Secondly, there is a significant body of research that has been conducted on Cape Town's food system. However, while there is some evidence of the influence of this research in shifting the policy and planning debates in Cape Town, these shifts have been slow.

An additional aspect that would be interesting for this topic to explore, is the role of knowledge production and knowledge validation. Much of the knowledge about the food system has been generated through engagement with residents, for whom these policies have direct ramifications on their daily lives. However, this knowledge is often not seen as having the same level of validity as the knowledge that is produced by universities or other research groups. Whose knowledge is validated and accepted, is an important element to explore for this topic and could uncover useful themes of power in relation to food planning and policy making in the city.


Graffiti in Woodstock Cape Town - Graffiti, either sponsored or as part of a resistance process is always a sign of pending gentrification in Cape Town
(Photo courtesy of Cape Town Tourism https://www.capetown.travel/corporate-resources/content-library/ - not for re-use)

# 11. Discussion

The preceding sections have provided diverse detail on diverse aspects of both the urban system of Cape Town and the food system of Cape Town. Additionally the food system of Cape Town is embedded within the food system of the region and that of the country, which itself is embedded within a wider global food system. This makes analysis and engagement in the drivers, determinants and in places of failure, the culprits responsible for failure difficult and complex. In the case of this report, this is made even more complex by the fact that much of the information provided does not align. A classic case can be observed in the food security data provided. In this report AFSUN data used the USAid Food and Nutrition Technical Assistance food security measurement tools (FANTA) to describe the state of food security in poor neighbourhoods in Cape Town (Battersby, 2011). This food security measurement was only applicable to poor neighbourhoods. While the three poor neighbourhoods in which the surveys were carried out could be deemed to be broadly representative of the wider Cape Town poor neighbourhoods, they were not representative of Cape Town as a whole. The author of the reports which discussed those findings, (Battersby, 2011) made this limitation explicitly clear and cautioned against wider generalisation. This caution was not heeded by many who used this data and in frequent reports on the state of food security in Cape Town, it is reported that 70% of Cap Town is food insecure. This is incorrect. However, despite the caution to avoid such generalisations, other researchers have been less directed on the limitations when some of the data from the Battersby (2011) AFSUN study is used. It needs to be made clear that the AFSUN study was specifically intended on understanding the food security status of poor urban communities. At no time did it purport to be a city-wide study. Later, the same FANTA tools were used to understand food security across the entire city. This study applied detailed research statistical processes in an attempt to ensure a suitable sample to enable claims of representivity. This study was able to show, using the Household Food Insecurity Access Prevalence (HFIAP) indicator that 46% of households were classed as food secure, while 36% are severely food insecure. The remaining 18% experience some degree of food insecurity (Crush et al, 2018).

In other areas of the report, data from COVID-related food insecurity is used to describe levels of vulnerability and exposure to risk. These figures offer a different measure of food security, drawing largely on economic status and the food poverty line to arrive at a determination of food security. This study applied three questions;

- In the month of March did your household run out of money to buy food?
- In the last 7 days, has anyone in your household gone hungry because there wasn't enough food? How often did they go hungry? (Options: Never; 1 or 2 days; 3 or 4 days; almost every day; every day)
- In the past 7 days, has any child in your household gone hungry because there wasn't enough food? How often did they go hungry? (Options: Never; 1 or 2 days; 3 or 4 days; almost every day; every day)

(van der Berg., Pate, & Bridgman, 2022).

This work reported largely on hunger and not food security. Additionally, in part of this report, information for the Statistics South Africa, General Household Survey (GHS) are reported. This information draws on a small survey carried out in a group that while deemed representative of the country is both limited in the sample size, but also in the questions applied. In the case of the GHS, the questions that speak to hunger and applied that Food Insecurity Experience Scale (FIES). While the recall range of the FIES questions enables a full capturing of the annual hunger cycles and "hungry seasons" - a twelve month recall, it asks only eight questions, the first six are binary questions with a single yes/no answer option, two questions ask a frequency question - Almost every month; in some months, but not every month, and only once or twice (StatsSA, 2021).

A number of other food security studies were also reviewed in this report, many used different measures of food security or hunger (for example Shisana et al, 2014) to report on food related vulnerabilities (for example Kroll et al, 2019). These diverse modes of reporting and accounting offer significant challenges when engaging the underlying ambitions of the AfriFOODlinks project. While the project seeks to build knowledge, it is also a project that at the heart of the project seeks to descale the food security and food systems debates to the urban scale. Much of the AfriFOODLinks project focus is in building a wider understanding of the state of the urban food system challenge with officials. Officials need three things to propel them to action. The first is political will, the second is a policy framework that in and of itself is supported by a fiscal provision that enables funding and action. Third, despite the preceding two being in place, both politicians and officials require a measure of defendability. If a particular policy or development action is engaged in, officials and politicians need to be able to defend that approach and in most cases, data is the fall back that enables defence. When data is diverse, varied and at times limited to small case studies, real courage is needed to enable action.

This was always the case in South Africa. In the case of Cape Town this was made even worse by the fact that not only were official hunger statistics limited to the constrained FIES questions, and as a result far lower than other food insecurity measurement tools were showing, national government food system reports also used proportions as opposed to actual numbers. As detailed in this report. When net food insecure, or net hungry figures are applied, a very different picture emerges, particularly in the most populous areas of the country, such as Cape Town. As Battersby et al (2014) detailed, a high percentage in a sparsely populated rural province might read as high but the actual food insecure in a densely populated urban area is far higher, despite a marginally lower percentage hungry. Whether this is deliberate or just poor data practice is outside the scope of this work but it presents significant challenges.

This account of food and hunger reporting is used to reflect on the challenge in the state of food systems knowledge in Cape Town. It is expected that this will be a key finding across the entire AfriFOODLinks project. Cape Town has an advantage as it has been grappling with these challenges for over 20 years now. Other cities in the AfriFOODlinks network have not been engaging the food systems questions for such a length of time and so might have lower levels of contradiction, but might also experience a similar tension.

It is not only food system data that is challenging to both acquire and then assess, most other subjects engaged in this report present a similar challenge. For Cape Town, bar one large piece of work on supermarket expansion, most data on the formal food system reported on here was from those same private sector actors. Here specific stances needed to be taken in terms of which data could be used. We chose to use data reported in a legal response on supermarket practices to the South African Competition Commission. These data were not the most current, but in our reading, were the most robust and carried the greatest integrity.

A similar challenge was encountered with information on infrastructure and services. Here City data and City reports were the sources of data. While these reports are often peer reviewed and are subjected to data verification, this is not always the case. Further, civics and activist groups do often engage these reports and highlight limitations, gaps and misrepresentations in such reports. As a result we draw on large reports that carry significant consequences if challenged for misrepresentation. Other reports and statements were generally not used.

These data and evidence limitations are detailed here because these sit at the heart of the intention of this report. This report, along with the other state of City Food Systems Reports from the other 20 cities (5 hub cities and 15 sharing cities) are intended to capture the current state of knowledge about the urban food system and the urban food system related challenges. It is doubtful that these tensions will be resolved by the end of the AfriFOODlinks project but the purpose of this report is to place a proverbial "stake in the ground" and capture as much as possible about what is known about the state of food insecurity, the state of hunger, the state of the urban food system.

The report has actively sought to engage multiple drivers of urban food systems outcomes, from infrastructure to governance, from policies to city budgets, from the state of the agricultural production environment to detail on food processing and distribution. This report has further sought to capture details on both the formal and informal food system. All these questions have been firmly placed in the context of the City of Cape Town. This focus on the City of Cape Town is key as the City is one of the hub cities. However, Cape Town is not an island and its entire food system is embedded within multiple other systems. Capturing these scalar and hierarchical dynamics and ensuring coherence in the positions and data offered has been a challenge and is by no means perfect.

The report remains a living document, a report that will be refined, clarified and aligned closer to the contextual realities as the AfriFOODLinks project proceeds.

Despite these data limitations, this report offers a useful account of the different systems and processes that influence urban food systems outcomes.

This report and the approach of the Cape Town AfriFOODlinks team has been to view the city, not just as a site of study, but rather when viewed through a food lens, the city is viewed as "a spatial container, a conceptual terrain, and a governance structure" (Moragues-Faus & Battersby, 2021: 4). This view enables generative opportunities to engage all the key AfriFOODlinks working packages. Details on all these work packages are offered in high level detail, engaging governance, space (through the food environments work) and concepts (through the engagement in the agrifood value chain, circularity and innovation).

However, attempting to synthesise these diverse, at times contradictory, even conflictual details, and the sheer breadth of information contained has been a challenge. It is easy to feel the inclination to revert to discrete projects as opposed to engaging the wider urban scale systemic challenges. The diversity of reports and variations in both who is reporting the information, who is collecting the data, the use of these data and the confidence in the data makes any combined analysis a significant challenge.

For this reason, a more pragmatic approach has been taken. Two stances have been applied to this report. The first, the easy approach, has been to capture the data and view this for what it is, a diverse collection of information and data that offers great utility, utility that will be enhanced through the project cycle as different evidence and knowledge is collected, analysed and published. is aligned with and compared to the details in this report and refined to enhance and deepen the state of knowledge of the food system of Cape Town.

The second approach has been to apply a more general food system related conceptual framework in an effort to try to find a way to integrate the diverse areas of review in a format that enables a more coherent engagement between the different areas of discussion. For this purpose, we applied the nutrition equity framework (See Nisbett et al, 2023). This has been applied for three key reasons. Firstly, it is a detailed framework that asks those using it to consider a diverse and varied range of factors that might exacerbate inequity in nutrition outcomes. The second reason is that given the extreme levels of inequity in Cape Town, using a toll such as this enables a far wider reflection on the drivers of that inequity and in so doing opens areas for consideration when engaging both knowledge and policy actors. The final reason is that a version of this framework was recently applied in a UN FAO HLPE report on food systems, HLPE Report #18, Reducing inequalities for food security and nutrition - and as such, building out this knowledge might also serve to impact wider global processes. The Nutrition Equity Framework is detailed in Figure 79.

The Nutrition Equity Framework

> illustrates conceptually how action on the socio-political determinants of nutrition is the most fundamental and sustainable way of improving nutrition equity for everyone everywhere, through 'equity-sensitive nutrition'. Efforts must ensure, in the words of the Sustainable Development Goals, that not only is "no one left behind" but also that the inequities and injustices … do not hold anyone back from realising their right to healthy diets and good nutrition.
>
> (Nisbett et al, 2021: 1)

The use of the nutrition equity framework as a tool to render the intersections between different food system actions, but also the lack of intersection, effectively the gaps, visible. This is particularly useful in the case of Cape Town and the detail that has been presented in this report, as will be detailed further.

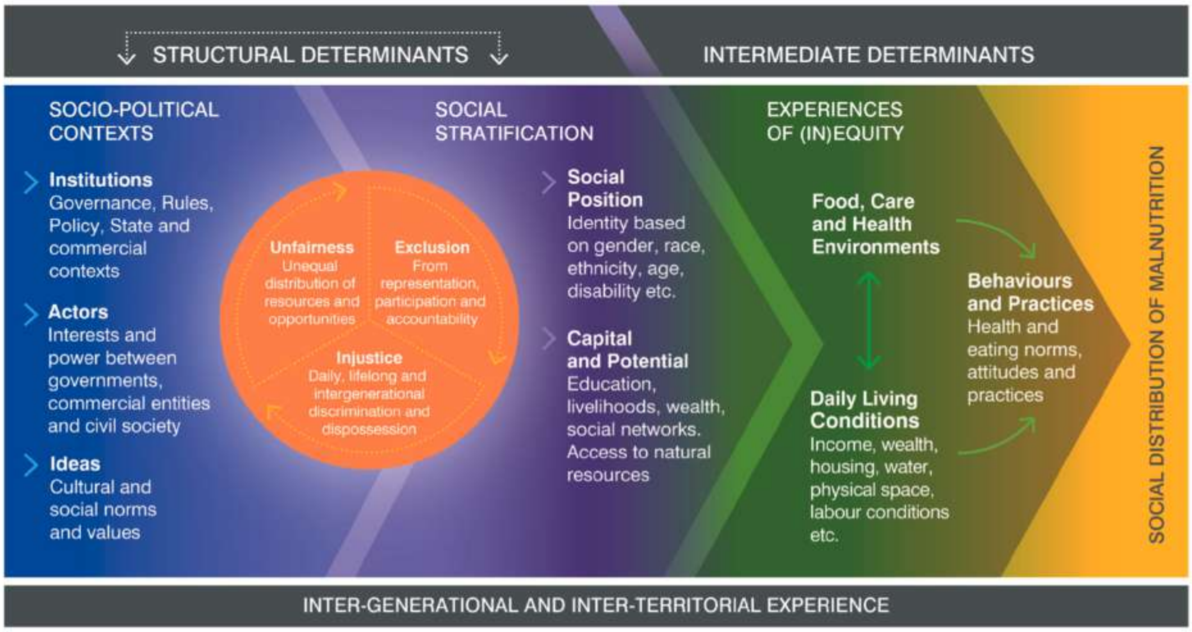



Figure 79: The Nutrition Equity Framework (Source: Nisbett et al, 2021:6)

This report has attempted to capture the socio-political context, specifically the institutions and policy, through the detail provided on the South African and Cape Policy architecture. This section is also a key site through which the conversation on the role of the private sector, and the associated institutions attempting to govern and regulate that sector are captured. The key actors are also detailed, both through an engagement in the different actors within the city, but also the other actors, specifically the informal sector, who all direct the outcome of the food system in Cape Town. Additionally within this element of the report, the work of civics such as Ndifuna Ukwazi and the Pietermaritzburg Economic Justice and Dignity group and their robust reporting is detailed, and folded into this wider section. The discussion and detail provided on the culture, even the tolerance of poverty and the associated slow violence of hunger and undernutrition are captured in the ideas and cultural norms and values section.

These factors, as reported in the preceding sections intersect with social stratification issues associated with gender, intersectionality, questions of race and the historical racism of the city, evident in both the slow violence of the nutrition outcomes, but also the spatial legacy of racism and racist policies in Cape Town, cast in concrete today, but also enmeshed in cultures, foods, practices and the spatial fragmentation of the city, as evident in the dot map discussed. Other aspects highlighting the inequities and extremes in social stratification are evident in reports on the extremely high Gini coefficient, the levels of unemployment, why certain schools require school feeding but others not, the social networks and coping strategies applied.

The intermediate determinants and experiences of inequity are captured in the discussions on the state of food insecurity, on the increases in diet related non communicable diseases and the poor and compromised food environments. These factors intersect with income, wealth and inequality, with living conditions, as detailed in the infrastructure section, coupled with engagements in spatial inequities and the low levels of employment. The behaviours and practices are captured in both the dietary diversity scores discussed, as well as the retail and food access patterns detailed. These intersect with high levels of food insecurity and deeply compromised nutrition outcomes.

These factors all feed from one another to demonstrate the social distribution of malnutrition and compromised health outcomes for a vast sector of the residents of Cape Town.

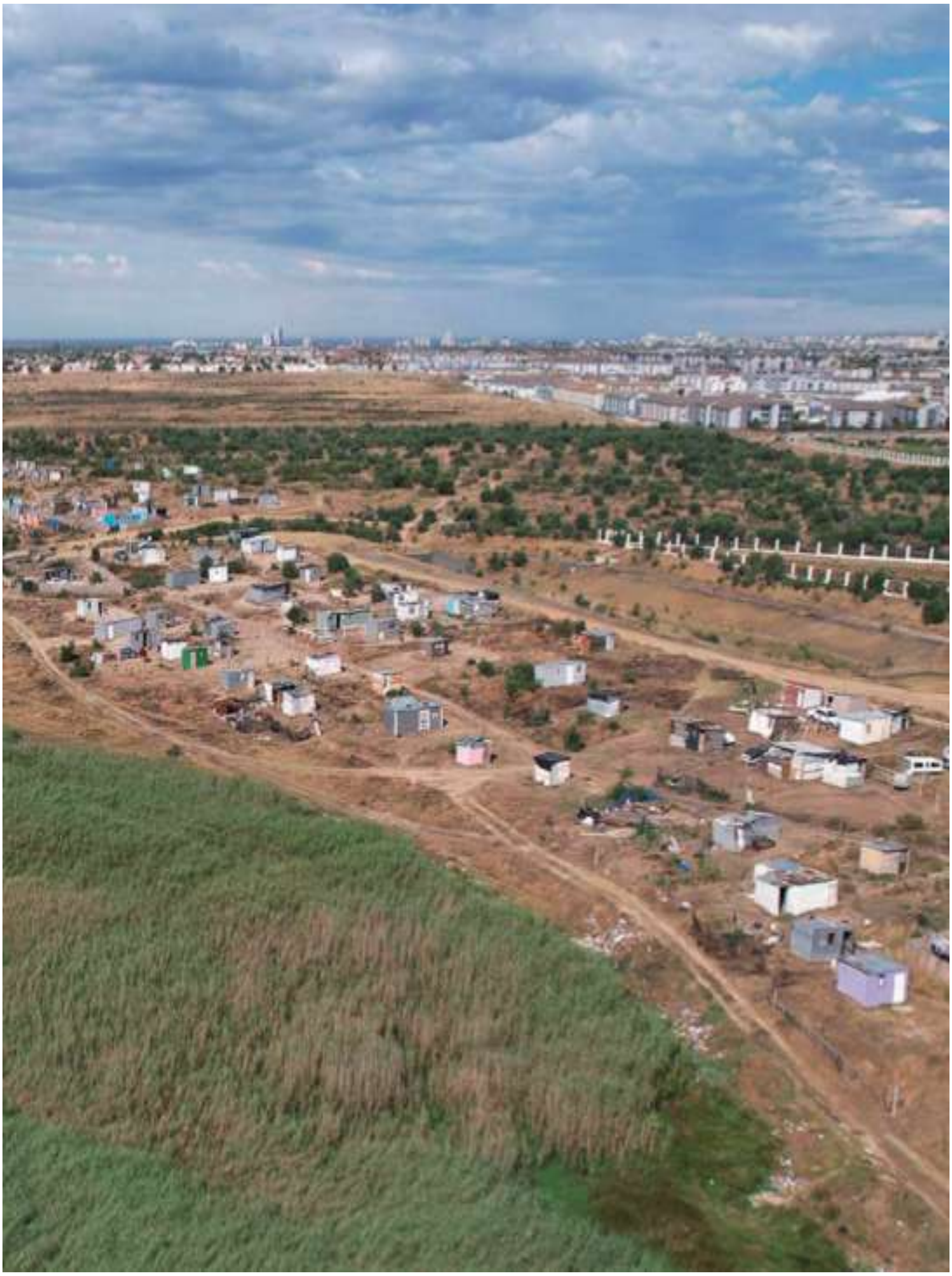
Less evident but a constant subtext to most of the reports that detail deprivation and limited access is the inequity engine factors, those aspects that include exclusion, unfairness and injustice, clearly evident in a number of the accounts of deprivation and poor health and food system outcomes. These "inequity engine" aspects drive and engender persistence in the negative food system outcomes. These factors are further exacerbated by the intergenerational explosion and injustice experienced by the urban majority in Cape Town. Here the account of the history of Cape Town, while technical and chronological in places, also detailed the exclusion and marginalisation of generations of Capetonians.

The question then is what the AfriFOODLinks project can achieve? How can the engine of inequity be stalled and reversed? Is this the task of AfriFOODLinks or is something more radical needed? For now, the task of AfriFOODlinks and the knowledge work package is to build a repository of knowledge, to capture what is currently known. However, just knowing would do a great injustice to those whose daily lives are impacted by the drivers of inequity across the structural and intermediate determinants of undernutrition, and by extension, negative urban food system outcomes.

# 12. Conclusion

The State of City Food System review for Cape Town was an attempt to capture the state of the food system but as this relates to the wider city, not just food. This approach explicitly saw the food system of the city embedded in the wider urban system. For many years, the food system of Cape Town was viewed as separate from the wider and often more evident urban food processes, from planning to the economy, from by-laws to governance structures, and many more. This report actively engaged the food system of a city, but through an account of multiple other city functions and factors. This report seeks to recentre the city food system as a central and core consideration of the city. As one of the trail blazers seeking to urbanise food, Wayne Roberts argued, "a city is what it eats".[42] This report focuses on a number of non-food system related aspects. This focus is informed by the question asked in a recent Food and Agricultural Organisation report questioning "what happens when the food and urban systems intersect at the city scale?" In an attempt to engage this, and aligned to the objectives of the AfriFOODlinks project, to take stock of existing data, knowledge and perspectives of immediate need, while actively seeking overlooked and under-utilised urban food systems knowledge by undertaking urban food system landscaping and situational analyses that span key urban systems (food, health, socio- economics, urban/infrastructure services). The review sought to gather and engage existing published knowledge, drawn from food and nutrition system assessments, stakeholder mapping, retailer mapping, engaging urban food policies, programmes and strategic plans across government scales, through literature, both nonfiction and fiction, on the cities. The objective is to begin building an understanding of both what is known about the urban system and the urban food system, but also, what is not known about both the urban and urban food systems of those cities. This report starts this process. It spans multiple and at times contradictory sources of evidence, spanning dates and scales. The report does not purport to be complete or comprehensive. It is, however, a stake in the ground from which existing knowledge can be tested, verified and deepened. It is a foundation for the wider process of engaging in, activating and questioning the food system of Cape Town. It is also an initial attempt to understand the intersections between the urban systems and the food systems of Cape Town. Currently, as evidenced by the need to apply the Nutrition Equity Framework, connecting the diverse and still largely siloed governance approaches presented challenges, impacting the ultimate coherence of the report. Generally, food is not referenced in other non-food city functions, lacking in its inclusion in conversations and policy documents focussing on governance, infrastructure, employment, economy, and many more. The need for change is urgent as highlighted in this report through an account of the extremely high state of food insecurity, and all forms of undernutrition. The report is perhaps poorly named as despite being an account of the state of the urban food system, it is also a state of the urban system report. It is hoped that this report will offer the necessary tools to ensure that at the conclusion of the AfriFOODLinks project, an account of the urban system is embellished, and rich in accounts that speak directly to the state of the city food system.

[42] Roberts, W. 2001. 'The Way to a city's heart is through its stomach: Putting food security on the urban planning menu', Crackerbarrel Philosophy Series, Toronto: Toronto Food Policy Council



Peri-urban scene in Cape Town (Source: CCT IR, 2023)

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