
The new National Development Plan (2011) and the need to create jobs through agriculture: Is the South African olive industry ready for the challenge?

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Abstract

This paper provides a scan of the South Africa commercial olive industry between 2008 and 2012 and argues the case for greater industry cohesion in this small agricultural sector. The National Planning Commission's National Development Plan (NDP, 2011) has identified the olive industry as one of the country's many small-scale, labour-intensive agricultural sectors with strong growth potential, and which must be supported to enable it to create new jobs. This paper argues that increased government support, linked to the new National Development Plan (2011), will be needed to enable the olive sector to contribute to national development objectives and create jobs. The olive producer association, SA Olive, functions as a cartel of private sector producers, without significant plans for the rapid up-scaling of the industry. While the number of commercial growers has steadily increased, black growers are under-represented, as are black entrepreneurs involved in processing and distributing olive oil and table olives. The article notes the absence of co-operative decision-making between the olive industry and government on issues of shared concern, and considers the concept of 'corporatism' as a potential system of interest representation for the olive industry. Corporatism would allow greater trust between government and the commercial olive sectors to be fostered. The paper discusses the example of Australia, where collaboration between business and government has contributed greatly to promoting the olive industry.

Key words. Arid areas, Karoo, National Development Plan, SA Olive, development crops, commercial olive industry.

1. Introduction

The South African National Planning Commission, located in the South African Presidency, was established in 2010 to identify sectors of the economy which could be boosted alleviate the unemployment crisis in the country. The unemployment rate in South Africa was 25.6 % in the second quarter of 2013 (StatsSA, 2013), and this figure excludes discouraged unemployed people, who have given up looking for work.

The National Planning Commission prepared a National Development Plan, dated 2011, but this document was only endorsed by Cabinet in September 2012. In particular, Chapter Six expands on the ways in which agriculture can contribute to meeting the unemployment

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challenge, particularly in the rural areas. The rural economy can be boosted through greater support to agriculture, but also through support to mining, tourism, agro-processing and fisheries (Presidency 2011: 196).

The National Development Plan highlights those commercial agricultural sectors which will be supported in regions that have the highest potential for growth and employment. Strategies that give new business entrants access to agricultural product value chains are identified as a specific need (Presidency 2011: 197). Olive growing and processing was identified as a small-scale agricultural sector that could be supported to create jobs (Presidency 2011: 201, 203). The Plan describes olives as a form of ‘small-scale, labour intensive agriculture’. The growth and export potential of small-scale crops such as olives, cherries, macadamias, pecan nuts, rooibos tea, cherries, berries and figs are potentially significant. The Plan also adds that access to growing markets will have to be secured. Scaling up South African production in these crops is a challenge, and quality standards also need to be addressed. New farmers, small-scale business, and black farmers need support. The NDP is not particularly in favour of expanding the industry by focusing on larger businesses. Security of tenure for new black farmers is also essential to ensure adequate investment in new farming operations.

It should be possible, in terms of climate and abundance of low cost labour, for South Africa to have an olive sector that rivals that of Tunisia or Morocco in scale. This paper argues that, for this to be achieved, Government support and additional private investment would have to be forthcoming. While the NDP creates the opportunity for olives to be highlighted as a development crop and sector, it warns that the development of new jobs in agriculture

will not be easy, and will require credible programmes, significant resources and stronger institutions, such as agriculture departments in local and provincial government. [Furthermore], greater effectiveness of extension officers needs to be given priority by provincial agriculture departments. White commercial farmers, agribusinesses and organized agricultural industry bodies can also help bring these objectives to fruition’ (Presidency 2011: 197-8).

The question arises whether the olive industry in South Africa is sufficiently geared for such interventions and support. This paper applies the concept of ‘corporatism’ to the South African olive industry, as it highlights potential, but notably absent, forms of co-operation between business and government, to meet collective goals.

2. Corporatism: Creating consensus between peak private and public institutions

Internationally, there has been a growing recognition that the structure of interest group mobilization can have a decisive impact on addressing collective social and economic problems (Mathews 2001: 478). Corporatism and pluralism are contrasting systems of institutionalized interest representation. ‘Corporatism’ refers to the organization of groups into national, specialized, peak organizations, and relies on a consensual means of policy-making. Corporatism involves goal-oriented collective problem-solving. In corporatist systems, organizational strength consists of a combination of degree of organizational centralization, internal coherence, and effective representation of their clientele. A fourth variable is access to government, which will enable preferred outcomes to be embedded in legislation and official regulations (Mentz 2011: 536). ‘Pluralism’, on the other hand, refers

to a system of factionalized, competitive, adversarial groups, and involves struggle over access to legislative influence (Matthews 2001: 483).

In the field of economics, 'corporatism' typically refers to a tri-partite negotiating structure, involving business representatives, trade unions and government, presumably to the benefit of all three actors (Padovano and Galli 2003: 247). Of course, there may be a continuum, ranging from pluralism at one extreme to full corporatism and the other, and each society is likely to find its position on the continuum due to a host of economic and political factors. There is unlikely to ever be a perfect system of interest representation. From a neo-liberal perspective, corporatism suffers from being rigid and unresponsive to the market. From a corporatist perspective, a pluralist or neo-liberal system of interest articulation is likely to produce short-term outcomes, and will prioritize individual over societal benefit (Boucher and Collins 2003: 296). Padovano and Galli (2003: 259) argue that a "intermediate" system, midway between the extremes of pluralist and corporate systems, seems to hold the most promise for output growth.

Corporatism is based on peak organizations which represent the broad interests of the constituency. At the summit of these peak organizations are political actors who get to know each other over a sustained period of time (Matthews 2001: 485). There are various reasons why corporatism can make a difference to economic outcomes: Producers can lobby for tax breaks and incentives, it can promote inter-departmental co-ordination, it can provide government funding for research, and it can improve the quality and quantity of products, thereby stimulating consumer demand (Doctor 2007: 124). Corporatism, or social compacts between 'peak' organisations (i.e. organisations representing a host of smaller associations), can be spectacularly successful, as was proven by the turn-around in the Brazilian automotive industry between 1996-2001 (Doctor 2007).

In this paper, the potential of the South African olive industry is described and analysed. Its performance is compared to that of a very similar country, Australia, where government-business collaboration has led to a massive growth in olive production and marketing. The paper concludes with recommendations for at least an 'intermediate' form of corporatism in the South African olive industry.

3. Methodology

This study began with a survey of secondary information related to the South African olive industry. Industry stakeholders (Morgenster, Buffet Olives and Hamilton Russell Vineyards) were interviewed in 2008 and 2010. Other information was drawn from South African and international organizational marketing material. SA Olive and the government-funded Agricultural Research Council (ARC) (ARC Infruitec-Nietvoorbij) were also consulted. The published work of Carlo Costa, a deciduous fruit and olive specialist at the Agricultural Research Council (ARC) at the Infruitec-Nietvoorbij station, was also consulted. A wide range of international literature on olive production was consulted, including countries such as Tunisia, Namibia, and Australia.

The question arises whether growing and processing olives could form part of creating resilience in rural areas in South Africa, assist local farmers to adapt to cope with disasters and/or climate change, as well as bring new black entrepreneurs in these arid areas into the mainstream economy, and thereby address poverty and marginalization.

4. A comparative study: The Australian olive industry

Australia's olive industry, which could form a model for the expansion of the South African olive industry, is large and well-structured, with 900 growers and 10 million trees. It has a single industry association, the Australian Olive Association, Ltd (AOA). The Australian Olive Association Ltd (AOA, 2012a) is the single industry body for olive industry participants, and membership fees are based on annual turnover (AOA 2012a, AOA 2012b).

The Australian olive industry has an Olive Industry Fund, established by the Primary Industry Funding Schemes (Olive Industry Fund) Regulations of 2009. These regulations require growers of olives (for oil, table or other olive products) to contribute to the Fund with a levy per kilogram of olives (PIRSA, 2012). The fund is administered by the Minister for Agriculture, Food and Fisheries. The Primary Industry Funding Schemes Act of 1998 requires that the person or body administering a fund must ensure that management plans for a Fund are prepared, meaning that there is a consolidated plan for how the funds are to be allocated.

The Australian Olive Industry Fund supports the following activities (PIRSA, 2012: 7):

- Market development, including export market development, branding, consumer education to increase domestic demand for Australian Extra Virgin Olive Oil (EVOO), differentiating Australian product from imported oils.
- Building supply chain relationships to establish an effective link between production and the market, establishing industry standards and managing risk, including the need for new marketing arrangements for the olive industry.
- Improving productivity, both on-farm and in processing, improving efficiency and critical mass to lower the unit cost of production, and making Australian EVOO more market competitive.

There are two categories of membership in Australian Olive Association Ltd. Category A includes the growers, while Category B includes suppliers, service providers, marketers and others who market or sell olive products with a brand owned or controlled by them, or provide a service to the olive industry (South Australia, 2006). Membership fees are based on annual business turnover.

The Australian olive industry is supported by occasional government grants (AOA, 2012b; Field, 2012), and also by research organizations such as the Rural Industries Research and Development Corporation (RIRDC) and the Department of Primary Industries and Resources of South Australia (PIRSA) in South Australia (PIRSA, 2012). In addition, the South Australian Research and Development Institute (SARDI) carries out research for agricultural industries (SARDI, 2012). Australia's Olive Industry Research and Development Plan guides the development of the industry (RIRCD, 2002), an Industry Biosecurity Plan has been drafted for the Australian olive industry (2009) (Biosecurity, 2009). The Australian industry also has a climate change strategy (James and Liddicoat, 2008).

While South Africa must entertain the notion of small emerging olive growers and smaller community projects, small olive operations often do not make good business sense, as the Australian experience has shown. A major influence on the Australian olive industry at present is the large number of small growers who represent farm diversification projects and hobby farmers of various levels of capacity and competence. There are no entry barriers to

production since land and trees are relatively cheap and available, and equipment costs, like those of small olive presses, are also now easily affordable (RIRDC, 2002).

Australian olive growers can therefore be divided into two categories: the larger, sophisticated private or corporate producers, typically with direct strategic alliances linked to processing and marketing activities along the value chain; and smaller operators with small groves, who tend to have little experience in processing or marketing of olive oil (and other olive products) and are less likely to be well-integrated into a supply chain. Over 70 per cent of olive trees are concentrated on fewer than 20 groves, with the largest (Boundary Bend Ltd in Victoria) having in excess of 6,000 hectares (PIRSA, 2012). Some Australian analysts believe the Australian olive industry is too fragmented, with 'too many' smaller groves, and the industry strategy aims to consolidate 'cottage industries' into commercial farms. Such consolidation attempts have exposed deficiencies in local knowledge and skills that need to be remedied (RIRCD, 2002: 3-6).

The size of operation of an olive farm can make a difference to profitability and viability. In Australia, a farm size of 85 hectares seems to be the threshold between small-scale and large-scale olive farms (PIRSA, 2006: 8-10). Australian studies suggest that there is a clear correlation between size of grove and profitability. Farms below 25 hectares are either part of a multi-enterprise farm or a 'hobby farm', sometimes with the costs being allocated to other business enterprises as a tax loss. For any grove below 85 ha, operating costs are punitive, and a decline in the global price of olive oil is often calamitous. If international oil prices are high (average \$5.25/l), well-managed groves of 5-10 hectares can be viable, but if the oil price drops below this, then even the large groves begin to struggle (PIRSA, 2006).

Australia has found that, if olives are grown for specialist markets such as organic olive oil and table olives, they may be more profitable, even in the case of small groves (PIRSA, 2006; Beckingham and O'Malley, 2007). Larger players in Australia can 'secure their futures by adopting strategies for investment-readiness and by establishing positions of influence in global supply chains'. Small players can achieve and maintain viability by adopting strategies for collaboration in supply and value chains, as well as product differentiation. This means knowing the end consumer of the product, the partners in the chain, and which chain partners are driving product quality, production and distribution decisions cycles (PIRSA, 2006).

5. Profile of the South African olive industry

5.1 A century of innovation

Relative to Europe, the South African olive industry is still very young industry. Jan van Riebeeck planted the first two cultivated olive trees at the Cape on his farm Boschheuvel in 1661. However, the fruit of the olive tree was not exploited for another 200 years. In 1907 a farmer from Paarl received a gold medal for the 'finest olive oil produced in the British Empire' at the London Show (Olives Go Wild, 2013). In 1896, Raffaele Costa, the eldest of three brothers, arrived in South Africa from Genoa, and established a nursery in Newlands, Cape Town. His younger brother, Ferdinando, collaborated with St. Illario Institute in Italy, and imported scions of the best cultivars, which was used to graft onto wild *Olienhout* rootstock. Several years of experimentation followed, to determine suitable varieties to adjust to local conditions (Olives South Africa, 2013).

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The most widely planted cultivar in South Africa is the Californian Mission, with other important cultivars including Manzanilla, Leccino, Frantoio, Barouni and Kalamata, which have been grown for many years. New cultivars in the industry are Coratina, Favalosa, Nocellara, Arbequina and other imported cultivars in minor plantings. South Africa has also developed a novel table olive cultivar called Nandi which can be processed as green or black olives. It displays good size with an excellent flesh to pit ratio (Olives Go Wild, 2013).

Today, South Africa has over 300 olive growers and producers of varying size and intensity (Olives Go Wild, 2013). South African olive oils compare very favourably with the best in the world as demonstrated by many prestigious international awards received.

The Western Cape is the most important and optimal commercial olive producing region in South Africa. It has about 720 000 mature olive trees, grown on 3 000 hectares of land, although olives are grown in other regions (interviews with industry, 2008 and 2010). By comparison, Spain has seven million olive trees. Traditionally, the South African olive sector concentrated on table olive plantings, but this has changed in recent years towards olive oil cultivars (Olives Go Wild, 2013), because good quality Extra Virgin Olive Oil (EVOO) commands a high price in the international market. South Africa is a small player in the global olive industry, but is able to compete on oil quality. Based on the rate at which new trees are being planted in the country, olive farming is growing at an estimated rate of at least 20% p.a. making it one of the 'fastest growing agricultural sectors in South Africa' (Olives Go Wild, 2013). At present, about 80% of the South African plantings consist of oil olives (Olives Go Wild, 2013), somewhat out of step with the growing local and international demand for table olives (John Scrimgeour, SA Olives, personal communication, 2010).

Many of the successful olive farmers in the country are established wine farmers with good farming knowledge and a strong resource base and networks. They are familiar with a select clientele which appreciates healthy food, specialized tastes, food branding, exclusive packaging, and agri-tourism. Consequently, olive farming is often started as part of an existing vineyard operation when many of the key overheads like land have already been purchased (Interviews, 2008 and 2010). Smaller olive farms in South Africa could be vulnerable, unless supported by other on- and off-farming activities, yet there is a growing group of small independent estates, often established by existing farmers, retired farmers (with experience in other crops), or investors who choose to migrate from the big urban centres to rural towns. Information and analysis on the number of new independent or 'lifestyle' olive farmers in South Africa is not available.

In South Africa, a third category of olive grower would be the emerging olive grower who may be a land reform recipient, a community using communal land, or a black entrepreneur. A particularly good example of community-based olive production is based at three schools in Beaufort West, which have planted more than 400 olive trees on their school grounds, and now press and sell their own olive oil (Beaufort West Tourism, 2013).

Such producers may need sustained support from a range of sources (government as well as existing commercial olive farmers) to ensure success. A key challenge is how to encourage black farmers and entrepreneurs to enter this sector.

The Western Cape commercial olive producers form the major group of stakeholders in the South African olive industry. They are made up of large-scale, well-resourced producers (Morgenster, Buffet Olives, Drakenstein Olives, Hamilton Russell Vineyards, The Olive Shed, Olyfberg, Vesuvio Estates, Willow Creek and others). In some cases, these producers

(such as Hamilton Russell Vineyards) have already established themselves in the wine industry. These large estates are able to compete internationally on oil quality (Interviews, 2008 and 2010). Understanding the world economics of olive oil is an important element of their success.

5.2 The olive producer organization in South Africa

SA Olive (SAO) is the single voluntary association representing the commercial South Africa olive industry. It represents about 120 producers and is the contact point for industry information through its committee members and website. It acts as an official mouthpiece for the industry. It aims to protect the industry against threats, to promote the industry and its product on all levels, and to provide guidance for best practice farming and production activities (Linda Costa, personal communication, 2008). SA Olive also conducts market research studies (Bizcommunity, 2011a).

SA Olive is as a Section 21 (non-profit) company with a board of directors. Members of SA Olive pay a membership fee according to the size of their olive business. They must record how many hectares are planted, how many trees they have planted and their annual production of table olives or oils. This information provides the only source of industry statistics. SA Olive also expressed an interest in funding social development and crop development to the benefit of their industry (Linda Costa, personal communication, 2008).

There is no collective marketing or sales of olive products, and essentially all producers compete with each other for market share. However, there are various websites, like the 'Olive Directory', which have been established by private individuals to assist in information flows within the industry. This provides information on equipment, trade shows, nurseries, and cultivars (Olives Go Wild, 2013).

5.3 South African olive production in relation to global patterns

South Africa is a very small player in the international arena. South Africa's olive oil production is not reflected by the International Olive Council (IOC) or other directories of olive oil producer countries and outputs. South Africa competes with larger non-European Union (EU) producers like Chile, Brazil, Peru, and Australia. In Africa, major olive producing countries are Tunisia and Egypt, while other African countries with smaller production levels include Morocco, Libya and Algeria (Turkekul *et al*, 2007).

Most of the international commercial attention is focused on olive oil as a global commodity, but table olives are always in demand, including in South Africa (John Scrimgeour, SA Olive, personal communication, 2010). The production of table olives is more complex, with processing to reduce the toxicity caused by the compound oleuropein. There are the traditional 'home industry' and artisanal natural fermentation methods to prepare table olives, but for large-scale commercial production, industrial methods are used to harvest and process the olives. Industrial scale processing has to be undertaken with care as many things can go wrong, resulting in spoilage. Artisanal and boutique foods are a growing global trend (Celentano, 2012) and in South Africa, if this were pursued as an opportunity for olive growers, there would undoubtedly be a range of research needs.

5.4 Marketing South African olives

In 2012, SA Olive (SAO) noted that there was no effective legislation to protect South African consumers from olive oil products with inaccurate and misleading labeling (Bizcommunity, 2011b). Consumers are advised to look for olive oil products bearing the 'Member of SA Olive Commitment to Compliance Scheme' (CTC) seal, a scheme initiated in 2005 to protect consumers against fraudulent practices and to set a standard of quality (Bizcommunity, 2011b). This seal confirms that the content is 100% locally produced in accordance with the SA Olive Code of Conduct and Practice, which is itself based on international standards, and that the product is adequately described on the label (Bizcommunity, 2011b). The seal also confirms the year of harvest, as this is an indication of the freshness of the oil. Olive oil does not keep well. Emerging black farmers seeking to enter the EVOO arena would also need to adhere to these standards or risk getting lower prices for their oils.

The individual growers in South Africa carry out their own marketing, often using 'boutique style' marketing approaches to attract affluent clientele, often by means of the internet. For example, an olive farm at Riebeeck-Kasteel advertises its products online using phrases like 'an ultimate olive experience' (Olive Boutique, n.d.). There may be opportunities for South African olive producers to develop other products (nutraceuticals and cosmeceuticals) for the local and international markets, including non-culinary products, to find new markets for their produce. Kloovenburg Wine Estate has developed olive orchards and a wide range of olive products that include cosmetic products. This estate is an example of a wine estate that has diversified into olives, and aims to develop an 'ever-expanding culinary and non-culinary product range', which they produce from 30 hectares of olive trees. The estate promotes its olive products through a website (Kloovenburg, n.d.).

5.5 Profitability of South African olive growers

Evidence from interviews suggests that smaller olive groves are not profitable on their own. South African olive industry survey respondents stated that for the 'smaller growers', olive farming is 'not very lucrative' and is 'difficult' because this type of farmer has to take all the risks in their agricultural enterprises. Many 'lifestyle' farmers enter the industry and set up new groves, but have to run other operations like guest houses and farm stalls to be financially viable (Interviews, 2008 and 2010). The threshold of profitability depends on the cost of buying land, the capital costs of establishing and maintaining olive orchards, as well as olive yields. There is a misconception that olives can be grown profitably on small parcels of poor quality land by communities. For olive oil producers of all sizes, financial viability can fluctuate in terms of global olive oil prices, often with disastrous results. Successful small producers usually maintain their profit margins through strategic collaborations along the supply/value chain, as well as undertaking product differentiation strategies (PIRSA, 2006). To do this, they need a sound sense of the olive business and an understanding of their industry and the supply chain. Inexperienced newcomers may not survive. The smaller growers need to know the end consumer of the product, who the partners are in the chain, and which partners are driving product quality, production and distribution decisions.

In South Africa, too, small-scale olive producers could potentially establish viable businesses, not only as growers, but as processors who may undertake the processing themselves and sell

them to various customers, including representatives of the food industry, the retail sector or direct to customers. But they would need detailed market information.

5.6 South African olive industry research needs

SA Olive provides useful information on the climatic requirements for growing olives (SA Olive, 2013). However, the South African olive industry has identified several key research needs, which are currently not being met.

There been little independent analysis on the social and economic impacts and economic multipliers of this industry, or a survey of the number of people currently employed from which to benchmark the creation of increased jobs. It will be important to have information on where olives are being produced, what yields per hectare are obtained in different regions; the identity of producers (small-scale, community projects on communal land, hobby growers, commercial growers) and an analysis of the sustainability of different sizes of operations, in the short, medium and long term.

Scientific research requirements include understanding the microflora (bacteria and yeasts) in order to optimize industrial-scale table olive processing; understanding spoilage organisms of table olive processing; optimising processing for cottage-scale table olive operations; horticultural yield improvement, and waste disposal of mill water and olive cake (the solids which remain after the pressing of olives). In fact, olive cake is now used extensively in Mediterranean countries as a source of fuel, particularly for heating greenhouses (IPA-Tech, 2013).

No research is currently done locally in the processing of table olives. However, SA Olive has approached the University of Stellenbosch to add olive research to their wine and yeast research programme, so that the microorganisms, including *Lactobacillus* strains, involved in the processing of olives can be better understood and improved (Linda Costa, personal communication, 2008).

Sourcing new cultivars is a particular challenge. The world olive industry is presently undergoing a radical transformation in order to meet the demands of the 21st century. Major changes involve the intensification and optimization of orchard operations, advanced horticultural methodologies, improved management systems, and efficient industrial technology linked to both table olive production, olive oil production and dealing with olive waste. South Africa needs to keep up with these developments. Considerable efforts are being made globally towards the selection and breeding of varieties more suitable for intensive cultivation. Important research issues include the long term uniformity of fruiting, and adaptation to local conditions. Desirable characteristics of new varieties include a high oil content and quality, low incidence of alternate year bearing, suitability for mechanical harvesting, and resistance to pests and diseases. In the case of table olives, features such as shape, size, uniformity of ripening time, or a high pulp to stone ratio, are also desirable. South African commercial (and community-based) olive growers need to keep up with, and benefit from, international developments.

There is no concerted industry-wide olive breeding programme in South Africa. Rather than develop local varieties (which is a long process), varieties are brought in from Europe and Israel, and royalties are paid by individual estates, rather than by the industry. Generally, local olive growers surveyed felt that these imported cultivars perform well, although there are

problems with root stock cultivars. Some of the growers also propagate plant material for their own use, while Morgenster produces olive planting stock to sell to the industry (Erasmus, 2008).

The wild olive, *Olea europea subsp. africana*, is a potentially valuable indigenous olive tree. South African horticulturists are experimentally grafting Mediterranean olive scions onto wild olive understocks, in an effort to produce a locally-adapted olive crop (Carlo Costa, ARC, personal communication, 2008, 2010). The localities of the wild olive (*Olea europaea subsp. cuspidata* (Wall. ex G. Don) Cif.), which occurs naturally in the Eastern Cape, can also give an indication of new areas that are suitable for commercial olives (Mkize, 2008).

Some of the pesticides used until recently in the South African olive industry are now banned in Europe, while replacements have not yet been registered on olives. European markets are intolerant of pesticide residues in food products, refusing entry and sale of contaminated goods. This means that Integrated Pest Management strategies will need to be developed in South Africa for olives where herbicides and pesticides are no longer used. In the Eastern Cape, where community-managed groves have been planted, insect pests are problematic (Mkize, 2008).

Another potential menace to the olive industry in South Africa is the sale of adulterated olive oil. In 2001, a multimillion rand scam was exposed, and laboratory analysis at the University of the Free State confirmed that a dangerous green colourant was used to colour sunflower oil to make it look like olive oil. The colourant is used in engine cleaners as well as in other petroleum products (News24, 2011). The South African olive oil industry does regular tests on all products being marketed as olive oil. However, such research would be a good candidate for a partnership with a public research institution, so that it can be done regularly, at scale, and can contribute to an in-depth corpus of knowledge about South African olive products.

In South Africa, the larger privatized growers' or producers' associations collect voluntary or compulsory funds from the industry to support sector-specific research and development, as is the case with the Citrus Growers Association, Potatoes South Africa and the South African Sugar Association. In these cases, a levy is placed on agricultural production to fund marketing and research, and to provide support for new industry entrants. In the case of the olive industry in South Africa, collecting additional funds to pay for research is not possible, as olive producers are few in number, and not large in scale (Survey findings, discussions with industry, 2008 and 2010). This is a major drawback for the South African olive industry, as it is currently unable to fund scientific research that would benefit the industry as a whole (Interviews, 2008 and 2010).

In July 2012, the South African commercial olive industry introduced a levy on olive oil and table olives, with the intention of funding a generic marketing campaign to promote the use of local olive oil and table olives. The levy consists of 40c/litre on extra virgin olive oil and 8c/kg on table olives now applies for all locally produced products (Erasmus, 2012). This revenue stream will promote marketing, but will not be sufficient to fund research and development.

In the absence of South African research, the South African olive industry tends to buy innovation, technology, cultivars and advice from well-resourced European institutions like the Italian Research Council. International scientific olive research, including biotechnological applications, is very advanced, especially in Europe. Some of the bigger

dual olive/wine estates rely on in-house experts and thus claim that they have no need for local research. This approach, however, tends to favour well-resourced players in the industry and also does not allow the industry to deal with looming disease problems that will affect all producers. It further disadvantages small-scale growers. If the South African commercial olive industry is not yet ready for a holistic Industry Plan, or a Research and Development Strategy, it should at least develop an Olive Industry Biosecurity Plan to manage biological risks. It should regulate importation of plant material as well as the spread of feral olives, along the lines suggested by the South Australian olive industry strategic plan (South Australia, 2006).

5.7 Finding markets for South African olive products

South Africa is a small player in the global olive industry, but successfully produces boutique Extra-Virgin Olive Oil (EVOO) quality olive oil. South Africa is not efficient at producing bulk olive oil or bulk/artisanal table olives. The international olive oil market is highly competitive and the established top global companies resort to collaborative arrangements beyond their geographic borders to entrench their positions and buy up interests along the supply chain (RIRDC, 2006). This makes it difficult for new entrants to get established. Producing and selling olive oil internationally does present an opportunity for South African olive growers, but only if they can gain entry to the international markets, and compete with the other 'new' olive producing countries like Chile and India. For this reason, new-comer olive growers in South Africa should investigate the local and regional African market as this market is expected to be less competitive.

Market information is somewhat fragmented for the South African olive sector, at least partly because the sector is not well organized. Olive growing and processing can create opportunities for a wider range of players up and down the supply chain in the olive industry, but there is no quantitative information on this in South Africa, other than that it remains an 'opportunity' (Linda Costa, personal communication, 2008).

The 2010 Olive Directory states that, since 2004, there has been a 40% increase in olive oil imports into South Africa, and a 275% increase in table olive imports. This should act as a market signal. Erasmus (2012), quoting SA Olive, said that currently the South African olive industry produces less than 20% of total domestic olive oil consumption. The country imported 6.8 million litres of olive oil in 2011, while total South African production in 2011 was expected to reach only 1.5 million litres. SA Olive's own market research in 2012 found that 80% of locally available olive oils are imported (Bizcommunity, 2011). It is unfortunate that local demand is met by imported products and that this opportunity is not addressed strategically by the local industry olive industry. Discussions with SA Olive (SAO) and the ARC in South Africa confirmed this situation (Interviews, 2008 and 2010).

Another indicator of the growth of the South African olive industry is that South African nurseries are selling more than 300 000 new olive trees per annum and are 'struggling to keep ahead of the demand' (Olives Go Wild, 2008).

The expansion of the demand for olives within the broader South African population should be also investigated for new markets. However, a disadvantage of growing olives for this market is that black South Africans are not traditionally olive consumers, although as levels of affluence increases in African countries, olives can become part of a middle class diet. In

contrast to traditional olive oil consuming countries, where annual *per capita* consumption of olive oil ranges between 12-24 litres, the average South African consumes 80ml per annum (Olives Go Wild, 2008). In South Africa, olive oil competes with other well-established vegetable oils, notably sunflower and canola oil (John Scrimgeour, SA Olive, personal communication, 2010).

There may be unexplored regional markets for table olives and olive oil, for instance in the Southern African Development Community (SADC) and the Common Market for Eastern and Southern Africa (COMESA) countries. If the South African olive industry does not position itself strategically in markets in Africa, other African olive oil-producing countries like Namibia could foreclose opportunities for South Africa (John Scrimgeour, SA Olive, personal communication, 2010). These opportunities would need to be thoroughly tested through market research, either by individual growers or by the industry as a whole, as part of an Industry Strategy. The ability of regional markets to absorb larger quantities of olive products would need to be explored. According to Carlo Costa (personal communication, ARC, 2012), table olives would be the best option for emerging players as the market locally, regionally and internationally is large and undersupplied. Potential markets could even include Australia, which, despite its own olive industry, still imports olive oil and table oil in excess of local production.

5.8 Threats to the South African olive industry

South Africa competes with larger non-European Union olive-producing countries such as Chile, Argentina, Brazil, Peru, and Australia. In Africa, potential olive oil competitors are Tunisia and Egypt, while other African countries with smaller production levels include Morocco, Libya and Algeria (Tunisia, 2008). Morocco is one of the world's largest producers of black table olives.

While countries like Chile and Argentina are already successful non-EU producers of olives, other large developing countries are beginning to experience an internal demand for olive oil. India and China are also developing their olive industries (Vikas, 2011a; Vikas, 2011b, Butler, 2011). In India, the 2012 annual olive oil demand is estimated at 42,000 tons, mainly because of affluent Indian consumers' desire for healthy foods. Some of the government-led olive-growing initiatives in India have failed because of top-down planning (Vikas, 2011b). It is important to understand the approaches which these countries have undertaken to support their national olive industries.

Namibia is a potential rival to South Africa. Namibia has plans to establish an olive growing sector, admittedly from a very low base (33 growers of which only five are considered economically successful) (Tjaronda, 2007). Olive farming is attractive to the Namibian government, as it is labour intensive. Namibian unemployment is 51.2% (2008 estimates), up from 36.7% in 2004 (African Agriculture, 2008). The Namibian government intends that olive farming becomes its 'most important commercial crop because it can contribute to the socio-economic development of arid areas, and enable farmers to move away from low-margin agricultural activities to more profitable ones' (Tjarondo, 2007). The Namibian Ministry of Agriculture, Water and Forestry has identified olive farming as one of the agricultural projects to be included in the joint Spatial Development Initiative (SDI) started by South Africa and Namibia in 2000 to stimulate the economic potential of the greater region (Tjarondo, 2007).

Establishing a bigger South African olive growing sector might be hindered by distance from international markets. The local and regional markets are still constrained by a lack of a cultural affinity for olives. Yet countries such as Brazil, exporting fruit to European markets, have established mechanisms such as producers' associations and are able to compete on quality even though they are also very far from their markets (Selwyn, 2008). Only detailed market research will reveal the size of market opportunities for an expanded South African olive industry.

Cheap, inferior and adulterated olive oil imports are a recognized threat to the local olive industry. South African producers complain that olive farmers in Europe are heavily subsidized, so an imported Spanish or Italian olive oil can cost half as much as a South African oil in local supermarkets (Brand South Africa, 2005). In 2012, South Africa's olive industry applied to the International Trade Administration Commission of South Africa for a tariff on imported olive oil, because cheap, low-quality oil imports undermines our own olive industry and job creation (Bizcommunity, 2012). The duty will amount to about R14/l on extra virgin olive oil, which will reduce the negative effects that subsidies paid to farmers in the EU are having on domestic extra virgin olive oil prices (Erasmus, 2012).

Although industry respondents argued that there 'were no new pests and diseases' of olives in South Africa, and that olives in general appear to be very resistant to pests and diseases (Interviews, 2008 and 2010), some new biological threats may emerge. Smaller, under-resourced players coming into the sector could be very vulnerable to such outbreaks. An industry biosafety strategy needs to be in place, including monitoring and early warning systems. The Australian olive industry's strong biosecurity strategy should serve as an example (Biosecurity, 2009).

5.9 Developing a national olive industry in South Africa

At present, there is no South African National Olive Industry Strategy which outlines the manner in which the existing commercial industry, independently or in partnership with government, will grow in the future. There is now an opportunity for government and the formal olive industry to engage jointly around the vision of the National Development Plan (2011) and consider how the sector can be scaled up to create jobs. A public-private stalemate exists, with the South African olive industry frustrated about the 'slow' government-led initiatives in agricultural development (Interviews, 2008, 2010). This frustration has led the commercial olive industry to remain independent, and use private investment to develop their business operations. Interviewees suggested that the private investment route is preferable, to grow an industry that competes internationally on excellence. The local industry also largely secretive, with individual growers guarding their trade information closely (Interviews, 2008 and 2010). Also, the South African olive industry is not particularly unified, despite the efforts of SA Olive. Olive growers compete vigorously with each other.

Selwyn (2008) showed that in countries like Brazil, where the governments sought to expand their agricultural production and expand rural economies, partnerships between public and private sector were essential. In creating a more widely represented olive industry in South Africa, partnerships between the private sector growers and processors, small-scale community growers, new emerging entrants and government will be needed.

Any further growth of the South African olive growing and processing industry will require an evidence-based industry strategy, associated with a research strategy and a biosecurity strategy (for new cultivar imports as well as dealing with new pests and diseases). Research needs to be conducted on the various geographical settings in South Africa, as well as the onset of climate change and projected increased aridity of the continental interior (Gitay et al, 2002; Cohen, 2009). The mechanism to develop and fund these strategies urgently needs to be explored, with commitment from both government and the olive industry.

A symptom of the failure of the South African olive industry and government to engage with each other, is the friction over research. The government-funded Agricultural Research Council (ARC), also called ARC Infruitec-Nietvoorbij in the Western Cape, has identified certain biosecurity risks to the industry, for example, the emergence of new pests and diseases. But it is unable to fund a bigger investigative or preventative programme for olives because of ongoing budget constraints. Matching funds from the industry would be needed to be able to establish a sustainable olive monitoring and research programme. The olive industry, on the other hand, is generally unwilling to pay for local research, as the larger estates are connected to international sources of cultivars, technology and advice elsewhere. These issues must be resolved.

6. Conclusion: a corporatist solution?

The South African national government, through the National Development Plan (2011), has effectively issued a mandate for the further development of the olive growing and processing sector to create employment. But how this will be implemented is not yet clear. The NDP (2011) indicates that olive growing and processing should play a much bigger development role in areas where few other crops can be successfully grown, specifically the arid and semi-arid areas of the country, but acknowledges that extensive support will be needed. Government will need to find ways to engage with the commercial South African olive sector to ensure that the vision of the NDP is realized. Rather than focusing on international markets, local and regional markets for olive products will need to be considered if olive growing is to meet the development objectives of the National Development Plan (2011). There are many models (in Tunisia, Australia, India, and China) that South Africa could investigate to assist with the establishment of a national strategy for an expanded olive industry.

The South African olive industry is currently small but significant, and dominated by well-resourced private growers with little room for emerging players. SA Olive believes that the current olive industry is 'too small' to invest in local research and developing emerging farmers; however, it did express an interest in the role of funding social development at some stage, to the benefit of their industry. The South African olive industry remains a small, elite industry, functioning as a cautious cartel of private producers, who generally operate independently of each other and without any concerted plans for the rapid up-scaling of the industry.

Because the South African government has earmarked agriculture as a vehicle for social and economic development, some version of corporatist partnership between government and the olive sector would contribute greatly to shaping a future olive industry. As the existing olive industry is already self-sufficient and privately funded, and has considerable intellectual capital about growing olives and marketing olive products, it is an essential partner setting up a national olive industry. To play a bigger role in social development in South Africa, the

South African olive industry itself needs to embrace new partners, identify new products and markets, undertake sector-specific research, and also implement new technologies for olive production, including biotechnology. It would indeed be an achievement if the South African olive sector could support the further development of the South African olive industry, and extend its membership to small black growers, communities and black entrepreneurs.

For the existing olive industry to play a greater developmental role, future funding mechanisms need to be explored, including leveraging government support. The awarding of an import protection levy for foreign olive oil imports is a good sign. The fact that the South African olive industry has applied to the national government for a tariff on imported olive oil to protect the local industry from cheap imports and ensure that it can create a 'future 30 000 jobs', suggests that the organized olive industry is ready for the challenge of scaling up to a much bigger olive industry. However, tariffs may also ultimately protect inefficient local producers, by placing an implicit tax on consumers. Such tariffs need to be utilized as a temporary protection while a more inclusive industry-wide development programme is designed. Once again, this will require a coherent and concerted approach, developed by government and the olive producers. Also, as olive industry growers are currently not particularly integrated, and compete with each other, it would seem that the current organized industry is not yet ready to prepare a holistic Industry Plan. The South Africa olive industry also lacks accurate industry information for planning. There has not been a collaborative olive industry situational analysis, and little economic data exists on the commercial growing of olives.

'Classical' corporatism would require business, trade union and government consensus, and this has been difficult to achieve and sustain. In South Africa, the most ambitious form of corporatist experiment has been NEDLAC (the National Economic Development and Labour Council). Formally, NEDLAC was supposed to serve as a corporatist institution for the discussion of economic policies, even though its formation was rooted in enthusiasm about the role that leading businessmen had played in largely non-economic matters during the transition – notably in encouraging constitutional negotiations (Seekings and Natrass 2011: 345).

The growing conflicts between market-oriented and state-oriented economic proponents, have shown the weakness of NEDLAC. In response to the launch of the NDP, the Chief Executive Officer of NEDLAC noted that the Plan's targets 'can only be achieved if the social partners are prepared to commit to serious discussion around the structural challenges and inadequate investment in the SA economy. It will require dialogue, cooperation and trust among social partners' (NEDLAC 2012). These are fine words, but it illustrates the very limited level of real corporatist discussions in South Africa. In their insightful analysis of South African political economy since 1994, Seekings and Natrass (2011: 341) pointed out three specific impediments to the formation of a developmental coalition: First, the state – both elected politicians and bureaucrats – remained deeply suspicious of established business; secondly, it was unwilling to discipline organized labour (whilst persisting in its mostly unilateral attempts to discipline business) and, thirdly, it became distracted by the lucrative terrain of 'black economic empowerment' (BEE). Furthermore, the state's commandist instincts combined, fatally, with a lack of capacity. As Seekings and Natrass (2011:339) commented, "There is little evidence that state and business have been partners in a "development coalition" concerned not only, or even primarily, with economic growth, but

also with distribution'. The crucial characteristics of a growth coalition - the exchange of information, reciprocity, trust and credibility - have been absent in the South African case.

At provincial level, there is some appreciation of the need for government to work with private sector partners. The term 'corporatism' is not known in government circles. The term 'public/private partnerships' tends to refer to partnerships on specific projects, where equity and operations are shared by government and business. The notion of a standing platform, where government, industry and other role players (such as trade unions) meet to discuss policies, legislation, programmes, regulations, budgetary allocations and implementation, is not understood.

Some consultation is envisaged at provincial level. In two arid provinces (Northern Cape and Western Cape), where olive production has been initiated, public documents use a range of various terms to suggest a vague synergy with the private sector. In the Northern Cape's Provincial Spatial Development Plan, for example, the term 'adaptive management' is advocated, which will bring 'resource managers, researchers, and other stakeholders together and encourages long-term collaboration through the development and strengthening of institutional ties' (Northern Cape 2012: 157). The Western Cape Agricultural Strategic Plan (2010:25) reported on a stakeholder consultation process, which consisted of written responses to draft documents, as well as a few meetings between officials and a broad range of relevant parties. (Neither of these documents mentioned the olive industry). The Northern Cape Local Economic Development Strategy, or LED (2011) made repeated mention of olive production in the province, but its only institutional recommendation was a range of loosely structured 'stakeholder forums'. The document suggests that these forums are less than effective: 'It is ... unclear to what extent these sector Forums support LED and how planning is integrated between sectors, wider non-governmental stakeholders, and the other spheres of government' (Northern Cape 2011: 532). The Northern Cape's Agricultural Strategic Plan, 2005-2010, refers to the need to provide support to farmers, to disseminate information, and to co-ordinate research; but its strategic planning process made no mention of consultation with commercial agriculture (Northern Cape 2005: 9-10). At municipal level, the level of business-government collaboration is generally poor, due to an inherited distrust of the business sector by local government politicians and officials (Van Rooyen 2013: 24).

In the agricultural sector, government has been reluctant to assist commercial farmers, focusing their energies instead on black and 'emergent' farmers (Atkinson 2013: 1). This has created an institutional void in industries such as olive production. This void is particularly notable when South Africa is compared to countries such as Australia.

It remains an open question whether corporatist arrangements in South African can actually work. The economic sphere is a site of extreme political and ideological contestation. Nevertheless, an 'intermediate' approach to corporatism (Padovano and Galli 2003) may well make a meaningful contribution, by promoting collaboration between institutions such as Olive SA and government departments such as Agriculture, Trade and Industry, and Science and Technology. At this limited level, there have been successful government-industry partnerships, as the case of Karoo lamb production in the Northern Cape will attest (KDF 2013). In this case, the entire Karoo lamb initiative was driven by universities, with donor funding, and government buy-in was only achieved at the end of the process. Olive producers have not approached government in any coherent fashion; nor has government shown much interest in engaging organised olive producers. The South African olive industry still operates in a pluralist fashion, as one small pressure group competing with other

stakeholders, and wielding little public influence. Given the success of the Australian olive industry, one suspects that South Africa is missing important economic opportunities.

A corporatist approach will require a stronger cohesion within the olive industry. The South African olive industry will need to set its business priorities, to create greater value; to attract investment into the industry; to involve emerging black farmers; to integrate olive sector development with the land reform process; to create local and export marketing strategies; and to develop transport and packaging strategies. Other business priorities could include exploring an optimal industry structure; establishing national and industry funding and levies; consolidating olive industry best practice; and developing industry indicators and a monitoring and evaluation plan. If the South African government wishes to expand the olive sector into an industry of greater commercial significance, deficiencies in local management, technical knowledge and production skills, particularly for emerging players, will need to be identified and remedied.

Independent researchers have argued that the South African government must find a way to negotiate with the commercial olive industry to scale up the existing industry and increase the number of small growers and black farmers involved, rather than set up an independent and parallel government-funded olive-growing programme. The outcome of government-led community projects with olives in South Africa up to now has been disappointing (Mkize, 2008), and lessons need to be learned.

The National Development Plan identifies the need for collaboration on research and development: 'The best solution is for the state to play an active role both in funding research and development, and in guiding the type of research and development that the private and public sectors conduct. Despite an excellent set of science institutions, research priorities are not always consistent with South Africa's competitive advantage or growth strategy' (Presidency 2011: 110). However, the NDP fails to investigate the potential of corporatist synergies. At best, it argues for 'social dialogue': 'A common front to forge joint solutions to the risks facing the economy must be found. South Africa cannot afford dysfunctional relationships between the public and private sectors and civil society. They urgently need to find one another' (Presidency 2011: 101). This vision falls far short of the corporatist institutional options which have been implemented in South Africa's competitor countries.

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