

REVIEW OF THE EFFECT OF COMMERCIAL FARM EXPROPRIATION ON THE FOOD RETAIL SECTOR IN SOUTH AFRICA

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ABSTRACT

To determine what effect commercial agricultural land expropriation will have on the accessibility of food and subsequently the retail sector in South Africa, this article comprehensively reviewed literature that identified lessons from recent land reform policies of other countries. Limited questionnaires and semi-structured interviews with selected individuals in the agricultural sector were also conducted to complement the literature reviewed. The focus is on large food retailers since these retailers are normally the anchor tenants in shopping centres. Subsistence farmers and convenience retailers such as those at filling stations and independent cafés do not form part of the study. It was found that land expropriation, especially expropriation without compensation (EWC), will have a direct negative effect on the availability, accessibility and cost of food if not done in a responsible manner and governed by law to ensure the process is transparent and fair. The implications are that the need for land reform and the ability of South Africa to produce food at prices which are affordable to the population should be balanced to avoid the economic collapse and social unrest as seen in some other countries.

Keywords: land reform, land expropriation, commercial agriculture, food security, food retail sector, South Africa.

1 INTRODUCTION

Land reform has been one of the most controversial and sensitive topics in South Africa since 1994. This study focuses on the expropriation of agricultural land, its impact on food security and more specifically, the effects of expropriation of commercial farms on the retail sector of the South African economy.

It is estimated that there are between 35,000 and 40,000 commercial farming units in South Africa (van Zyl [1]). The growing of crops, animal farming and mixed farming made up 86.3% of these units in 2017. The census, however, only included VAT-registered farming enterprises and thus not totally representative of the commercial farming landscape in South Africa (Kirsten and Sihlobo [2]).

Even though the total number of farming units remained relatively constant from 2007 to 2017, the income produced by these farms increased by 288% during the period (StatsSA [3]) due to technology, better cultivars and improved farming practices.

20% of farms in South Africa produce 80% of the food in formal retail outlets (von Bormann [4]). Not only do these farmers produce most of the food consumed by the estimated 59 million people in South Africa (StatsSA [5]), but they also export large amounts of produce globally, bringing much needed foreign currency into the country.

Uys [6] estimated that South Africa had 120,000 commercial farming units in 1980. These units decreased to approximately 40,000 in 2017. It is foreseen that this number will further decrease to 15,000 in the next 15 years (Gosling and Moolla [7]).

It is estimated that the South African population will be approximately 73 million people by 2050 and the demand for food will double. The demand for meat and milk is estimated to increase with 200% (von Bormann [4]).



With the ever-increasing population, the pressure on food production will be higher than ever. Supermarkets are the major channel delivering the food to the population – they make up only 2% of the retail outlets in South Africa, but an estimated 60% of food is sold by them and the percentage is growing (Joubert [8]). According to the 2020 Pick ‘n’ Pay Annual Report [9], the five largest retailers for food and groceries account for between 50% and 55% of formal retail sales. Pick ‘n’ Pay further estimates that the size of the total food and groceries market of South Africa was R970 billion in 2020, 60% of which is considered to be formal retail.

Commercial farming constitutes 80% of the agricultural output in South Africa (Export.gov [10]). It is thus important to protect the commercial agricultural sector to produce the food necessary for the supermarkets, restaurants and take-away businesses to sell to the public. A large percentage of these outlets are situated in shopping centres. Although different challenges all have an impact on access to food, the focus of the present study is on the effect that land expropriation can have on the availability and price of food and the impact it will have on the distribution channels via the formal retail sector.

2 FOOD IN SOUTH AFRICA

The availability of food not the only factor contributing to food security – the type of food, utilization and access to food are equally important (see Fig. 1). Only 46% of the South African population is food secure, with 26% and 28% experiencing hunger or at the risk of hunger, respectively (Shisana et al. [11]). In general, most South Africans cannot afford a healthy diet (Temple and Steyn [12]).

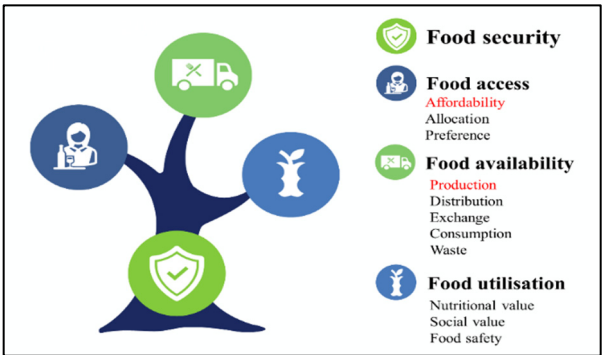


Figure 1: The three elements of food security. (Source: Own interpretation from Pereira [13].)

Hunger and food security are two separate issues. South Africa is currently food self-sufficient, either by local production or imports (Rahmanian [14]). It can thus be concluded that affordability is the main factor driving food insecurity in South Africa especially when it comes to healthier, nutritional foods.

Even though the agricultural sector as a percentage of the South African GDP declined from 10.66% in 1960 to 1.88% in 2018 (see Fig. 2), the sector remains a major player when it comes to offering employment in South Africa. It is estimated that 8.5 million people (16% of the population) depend directly or indirectly on agriculture for employment (von Bormann [4]). It is therefore crucial to ensure the agricultural sector is sustainable and remains on a growth trajectory.

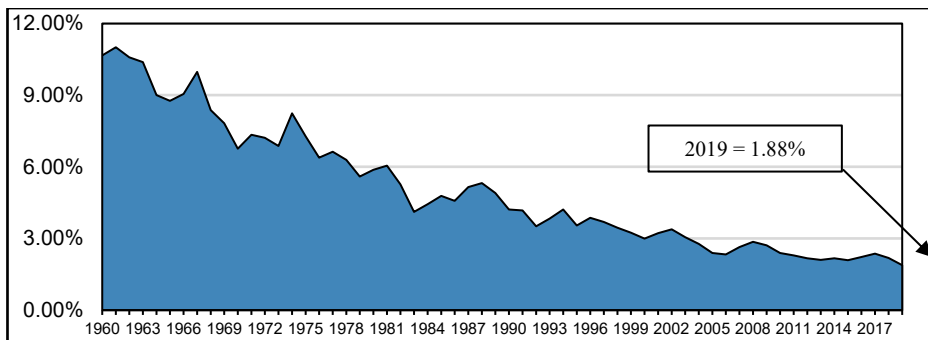


Figure 2: The agricultural sector as a percentage of total GDP [15].

Food price increases play a major role when it comes to social unrest (see Fig. 3). Although corruption by both the labour unions and the government is to blame (Lakmidas [16]), a major reason for these unrests is worker demands for pay increases above the official inflation rate (Bam-Yam et al. [17], Corcoran [18], Louw [19]). It is generally recognised that high food prices and a deterioration in food security may well trigger widespread violence especially in vulnerable populations (Lagi et al. [20]).

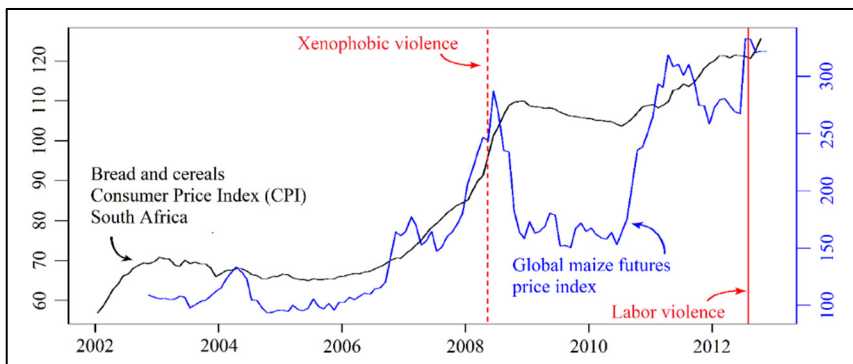


Figure 3: Food price index and major social unrest events in South Africa [17].

Food inflation is a significant variable to determine headline inflation in emerging markets (Mohanty and Klau [21]). Food and non-alcoholic beverages inflation were the third largest contributor to the average headline consumer price inflation in 2019, contributing between 13% and 15% to the total inflation rate (SARB [22]).

Food inflation is mainly driven by demand and supply factors. The demand factors can be controlled by monetary policy and disposable income of consumers as explained above, while supply factors will be a combination of policies to address structural issues (Louw [19]). Part of these factors includes the government policy on land expropriation.

3 THE SOUTH AFRICAN FOOD AND GROCERY RETAIL SECTOR

The informal market is relatively small in comparison with the formal market. Table 1 indicates that the total formal market is in the region of 83.6% of the total food and retail

sector. Hypermarkets, supermarkets and hard discounters made up 59.4% of the total sector in 2018 (MarketLine [23]).

Table 1: Key figures of the informal food retail sector.

Description	Amount
Informal food takeaways	> 50,000 shops
Turnover	> ZAR 90 billion a year
People employed	> 200,000
Hole in the wall spaza shops	> 70,000 shops
Spazarettes (informal supermarkets)	> 30,000 shops
Informal cash and carry turnover	> ZAR 150 billion a year
Hawkers or tabletop vendors	> 500,000 hawkers/vendors
Municipal fruit and vegetable trade from informal sector	± 60%

Based on an exchange rate of ZAR13.255/USD, the size of the total food and grocery sector was ZAR652.3 billion in 2018 (MarketLine [23]). In 2018 the growth declined to 3.7% mainly due to the exchange rate, droughts, rising interest rates, increasing fuel/energy costs and the unstable water supply which have contributed to less-than-ideal circumstances for the sector. The fierce competitiveness among the major players in the sector enabled the sector to continue to grow and MarketLine [23] forecasts that the sector will grow with an annual compounded growth rate of 5.1% up to 2023. The impact of Covid-19 was not accounted for and any possible impact of land expropriation was not cited in their findings.

The total South African food and grocery sector consists of food at 69% (ZAR450.3 billion), followed by drinks at 23% (ZAR149.8 billion), tobacco at 6% (ZAR37.6 billion) and household products at 2% (ZAR15.2 billion) (MarketLine 2020). It is thus safe to say that any possible external factor that has a major effect on food will lead to an impact on the total food and grocery sector.

4 THE PROPOSED EXPROPRIATION BILL 23 OF 2020

A significant step in the South African land reform process was reached when the Expropriation Bill 23 of 2020 was published in the Government Gazette on 9 October 2020. There is currently much controversy in the media regarding the possible consequences of the Bill. The Bill essentially provides for the following (Coetzee [24]):

- The expropriation of properties in the interest of the public.
- Expropriation without compensation in certain instances for public interest. This is the more controversial part of the current land reform debate over the last few years.
- Other matters connected to the Bill.

The Bill contains the following four key aspects (Coetzee [24]):

- A uniformed expropriation process.
- All expropriating authorities must adhere to the mandatory process.
- Determination of compensation.
- The final decision lies with the court.

Boshoff et al. [25] issued an opinion paper to clarify some of the misconceptions of the Bill and highlighted some inherent risks. Apart of the legal risk of litigation, the following two risks were identified:

- The political left may use it as a tool to use expropriation without compensation to gain support. If the expectations of the landless people and the political left are not aligned to the actual provisions and intent of the Bill, it may pose challenges in the future.
- Inaccurate and sensationalized comments in the media and other public sources could pose a danger to investor confidence in South Africa.

There are many opinions in the public domain on what the impact of land expropriation without compensation will be on the current land owners and their personal wealth. However, the focus of this study is rather on the impact on the South African food security, food inflation, the retail sector and the overall economy. The major concerns are the following:

- There is no consensus if it will be necessary to amend Section 25 of the Constitution to allow expropriation without compensation.
- The negative impact on food security if commercial farmers do not remain on the farms (Advisory Panel on Land Reform and Agriculture [26], High-Level Panel on the Assessment of Key Legislation and the Acceleration of Fundamental Change [27]).
- If the agricultural sector is seriously damaged due to a fast-track land reform policy, the South African economy can collapse as in the case of Zimbabwe (Hlomendlini and Makgolane [28]) and in Venezuela.
- Commercial farmers will be hesitant to invest further to enhance productivity because of uncertainty on their continued ownership (Advisory Panel on Land Reform and Agriculture [26]).
- Without guaranteed ownership of the farms financial institutions will be extremely hesitant or unwilling to finance farmers for capital investment.
- Expropriation without compensation will not accelerate land reform, simply because the State will become the owner of the land and nothing prevents the State to expropriate land from black farmers to benefit the elite (Free State Agriculture [29]).
- The Bill in its current form is not only applicable to agricultural properties but all types of properties i.e., immovable, movable and even intellectual property (Merten [30], Mabasa [31]). In its current form the Bill can have far wider economic consequences than just on the agricultural sector.
- Unreliable and incomplete information on the progress of land reform is driving policy decisions. A common theme in the research is that land reform is too slow and further interventions are necessary. However, Kirsten and Sihlobo [2] is of the opinion that the progress of land reform is underestimated due to poor record keeping. And estimate that the various forms of land reform, bringing the total to 15.5 million hectares, equivalent to 67% of the 2030 NDP target.

Even with the assumption that these figures reflect the current land reform progress more accurately, it does not confirm that the progress is acceptable to the majority of the South African population.

There are various examples of fast-track land reform programmes all over the world where these countries paid a high price. These include Venezuela, Ethiopia, Vietnam, Romania, Portugal, Spain and Zimbabwe. Spain, Vietnam and Portugal, however, realized the harmful effects on their economies and retracted the policies. The two most recent cases which is still suffering from the consequences of their policies are Venezuela and Zimbabwe.

In both Venezuela and Zimbabwe large commercial farming units were expropriated without compensation and divided into smaller units in an effort to uplift the poor communities, especially in rural areas. The major lessons from these countries are the following:



- Fast-track land reform was triggered by the slow pace of reform under the previous policies.
- A substantial decline in economic output in both the agricultural and manufacturing sectors.
- A decline in their GDP.
- Negative investor confidence.
- The policies were plagued by political agendas.
- Corruption by State officials in allocating the farms.
- No legal recourse or framework where the previous owners could challenge the expropriation.
- Land invitations with no support or protection from the police for the current owners.
- New owners were not given full title to the properties.
- No or very limited post settlement support.
- No training and development to grow these farms into commercial units.
- Food shortages and hunger.
- Increased poverty.
- Social unrest.
- Hyper-inflation.
- A drastic devaluation of their currency.

Irresponsible land expropriation will have drastic consequences not only to the food sector, but the whole economy of a country. In turn, this will inadvertently have an impact on the total retail sector of which Venezuela and Zimbabwe are prime examples where their land reform policies had a catastrophic impact on their inflation and exchange rate and the economy as a whole. No retailer can operate in a hyper-inflation environment. As the cost of food increases, retailers will have to adjust their prices accordingly. Consumers will change their buying habits in order to survive, thereby putting other markets in the retail sector under pressure, not only the food sector. Salaries and wages do not necessarily increase at the same rate as inflation, leaving many people unable to buy food. This in turn leads to social unrest and violence which cause physical damage and loss of property. In an effort to stop the ever-increasing spiral of food prices Venezuela and Zimbabwe imposed price restrictions. Since producers were unable to continuously supply at a loss, this led to further shortages which further fuelled the inflation rate.

Land expropriation in South Africa is not new. The current Expropriation Act of 1975 predates the Constitution and it is necessary to amend it to comply with the current requirements of the Constitution. Even though expropriation without compensation is only proposed in the Expropriation Bill of 2020, there are similarities with the current land reform programmes and those that happened in Venezuela and Zimbabwe. These indicate some vulnerabilities/pitfalls in the system and include:

- Decline in agricultural output of the farms that have been expropriated.
- Lack of post settlement support for the beneficiaries.
- Beneficiaries do not receive full title to the properties and are unable to obtain finance for investment capital. Current lease agreements offered by the State of up to 30 years are not sufficient. In countries like Zambia the leases are 99 years. This will motivate farmers to invest for them and their offspring thereby growing the unit for optimum production.



- Under the current policies and laws remains the preferred form of ownership full title to the properties. This however comes with challenges because traditional social and off-register tenure arrangements are a reality for a large part of the population.
- Various instances of political agendas.
- Corruption by State officials.
- Increased trend in land invasions.
- Social unrest in times of high food inflation.
- The slow pace of land reform, although conclusive data is not available.
- The general assumption that land reform will lead to the overall wellbeing of the people of South Africa especially in poor rural areas.

The only factors not currently listed above are those that were as a result of the fast-track land reform in Venezuela and Zimbabwe. Currently South Africa is still a country governed by the rule of law and the protection of property rights in terms of the law. As soon as these factors disappear it is safe to say that the Venezuela and Zimbabwean scenarios may become a reality. The current proposal of expropriation without compensation is fuelled by these fears because of the similarities with Venezuela and Zimbabwe.

5 METHODOLOGY

A variety of current literature on recent land reform initiatives in other countries was comprehensively reviewed. To complement the review, limited questionnaires and semi-structured interviews with selected individuals in the agricultural sector were also conducted. Selected individuals in the agricultural sector were approached to participate in questionnaires and semi-structured interviews.

The selection of the participants was done by means of a combination of convenience sampling and snowball sampling. Braun and Clarke [32] describe convenience sampling as a common approach in participant-based research and it is used when the participants are easily accessible to the researcher. In this type of sampling, participants are almost always self-selected and do not necessarily bear a relationship to the wider population. Braun and Clarke [32] further state that snowballing is also a common sampling technique and often forms part of convenience sampling. In the case of snowballing, the sample is built up through the networks of the participants and the researcher. Seventeen completed questionnaires were received and analyzed.

The respondents have combined 410 years' experience in the agricultural sector divided into 95 years primary agriculture, 265 years secondary agriculture and 50 years other agricultural related activities.

More than half of the participants professed to have knowledge of the effect of expropriation and the outcome of these cases. All but one of these nine participants indicated that the ability to provide food decreased on average with 86% after expropriation. None indicated that the ability to provide food increased after expropriation.

Table 2 divides the participants categorised above further into their fields of experience. One participant may have more than one field of experience and the total will not correspond to the sample size of 17. The majority of the participants are involved in the financing of agricultural entities, such as farms or businesses. These individuals represent a wide range of backgrounds and land expropriation is of critical concern since it could influence the quality of credit extended to the borrower as well as his or her ability to collect the finance extended. Secondly, primary agriculture is represented by participants that are involved in the primary cultivation of agricultural products and have the capacity needed to farm on a successful commercial basis. Thirdly, executive directors of various agricultural companies are

represented. Their views bring another dimension to the feedback as these individuals normally have a much broader point of view.

Table 2: Field of experience of the participants.

Number of participants	Type of agriculture	Field of experience
13	Secondary agriculture	Credit granting and agricultural finance at agricultural financing houses and banking for various types of primary agricultural products and agricultural processing companies
1	Secondary agriculture	Development finance and training for upcoming farmers
5	Secondary agriculture	Directorship
6	Primary agriculture	Cultivation of produce i.e., livestock, fruit, wine, etc.
2	Other agriculture	Advice on security, structuring of transactions, contracts, etc.

6 FINDINGS

Various reasons for the decline in food production due to land expropriation were given, as summarized in Table 3. Individual ownership and medium to long term mentorship programmes to transfer skills will go a long way to ensure that these properties will continue to contribute to food production of South Africa and mitigate the negative effect on food inflation and the food retail sector.

Table 3: Reasons for the decline in food production on expropriated farms.

Reasons for the decline in food production	Number of times cited	%	Category
Lack of skills transfer and mentorship with regard to general, financial and human resource management	2	16.7%	Lack of skills 50.0%
No or limited commercial farming knowledge	4	33.3%	
No access to finance either for capital expenditure or working capital	2	16.7%	Lack of finance and title deeds 25.0%
No transfer of ownership/title on an individual basis	1	8.3%	
Withdrawal of support from previous owners.	1	8.3%	Other 25.0%
Infrastructure destroyed by beneficiaries.	2	16.7%	
TOTAL	12	100.0%	



Following from the above, the action items that could have contributed to the successful expropriation of these properties were analyzed. The responses were grouped into five categories as indicated in Table 4. Again, transfer of skills, mentorship and training, not only in the short-term but also on a medium- to long-term basis, were at the top of the list. To farm successfully on a commercial level takes years of experience and skills transfer must take this into account.

Table 4: Actions that could have contributed to the successful expropriation of farmland.

Action items that could have been done	Number of times cited	%	Category
At least medium-term training and mentorship in management, financial and human resource skills	5	33.3%	Skills transfer 46.7%
Assisted co-management from knowledgeable 3rd parties or previous owners	1	6.7%	
Proper skills gap analysis of beneficiaries	1	6.7%	
Individual ownership – transfer of title	2	13.3%	Finance and ownership 53.3%
Access to capital and working capital finance	6	40.0%	
TOTAL	15	100.0%	

The reasons why the measures in Table 4 were not implemented or considered are summarised in Table 5. The most common reason cited was naivety and ignorance from Government and other parties involved to assume that these farms will continue as in the past without further intervention or support at 62.5%.

Table 5: Reasons for not considering the listed action items.

Why were the action items not considered?	Number of times cited	%
Naivety and ignorance of the Government and other parties involved	5	62.5%
No ongoing support to ensure farms remain commercially viable	2	25.0%
Previous owners saw opportunity to sell farm at inflated prices due to pressure on land reform	1	12.5%
TOTAL	8	100.0%

Table 6 summarizes the major reasons why land reform was not successful in the past. The table compares the Venezuelan and Zimbabwean case studies, the High-Level Panel and Advisory Panel findings, the current public perceptions on the Expropriation Bill as well as the responses received from the questionnaires.

Table 6: Major reasons for land reform failures.

Items	Venezuela	Zimbabwe	High Level Panel	Advisory Panel	Public perception of Bill	Questionnaire	Total
Full titles were not given to beneficiaries	✓	✓	✓	✓	✓	✓	6
No access to capital and finance	—	✓	✓	—	✓	✓	4
Political agendas, interference and corruption	✓	✓	✓	—	✓	—	4
No legal protection	✓	✓	—	—	—	—	2
Food production reduced because of the lack of post-reform support including mentorship programmes	✓	✓	✓	✓	✓	✓	6



In all cases are full ownership of land and post reform support the major components that are necessary for a successful land reform program. Access to finance and capital are linked to the above and will be addressed to a large extent if these major two aspects are successfully addressed and implemented. Political agendas and corruption also play major roles and will have to be eliminated. Legal protection by the law and a robust legal system to keep the process of land reform honest goes hand in hand with this.

Although there will always be challenges to land reform, from financial to social, it is clear that no land reform program will be successful if these aspects are not addressed first.

The majority of the participants (58.8%) indicated that land expropriation with compensation will have a negative effect on the ability of South Africa to provide in its demand for food. The major reasons cited for the decline in food production are again the lack of technical, financial and operational support post land reform, the lack of commercial farming skills of the beneficiaries and no training and mentorship.

The opinion of the participants if EWC will have a different effect on food production than expropriation with compensation were tested. Most of the participants (58.8%) indicated that EWC will have a more negative effect on food production, followed by 41.2% indicating the effect will be the same and none saying it will have a more positive effect.

The major reasons cited for a more negative effect are that the current owners will not be motivated to continue investing in the farms to ensure optimal productivity levels as well as that expropriation would be fast tracked, thereby increasing the number of expropriations and reduce the food production capacity of these farms. The reasons why some feel EWC will have the same effect as with compensation are firstly, it will affect the individual balance sheets of the current owners and not necessarily food production. Secondly, is that many foods can be imported at the same price if not cheaper. This argument might be true in a normal inflationary environment, but if expropriation leads to hyper-inflation as in Venezuela and Zimbabwe, the importation of food will be much more expensive. Thirdly, only unproductive land will be expropriated and thus will not have a material effect on current food production, the same as for expropriation with compensation. Assuming that expropriation, with or without compensation, will have a negative effect on food inflation, the participants were asked their reasons on the effect it will have on the overall food inflation of South Africa. Most of the participants (70.6%) indicated that food will have to be imported and with the weakening of the ZAR these imports will be more expensive.

The participants were asked which agricultural produce will be affected the most by land expropriation. The results were mixed and no definitive conclusion could be made.

Lastly, the participants were tested on their knowledge of the current Land Expropriation Bill and more specifically, if they knew the five circumstances in which land can be expropriated without compensation. The aim is to establish if these opinions and feedback were based on perceptions, media opinions or the actual circumstances as listed in the proposed Bill.

Almost 59% of the participants knew the five conditions for EWC. However, only 17.6% of these participants could list the five conditions correctly while the majority, (35.3%) could not list them at all. This, with the 41% of participants that do not know the circumstances at all, it is safe to say that the general knowledge of the Land Expropriation Bill is lacking and much of the current debate is driven by emotions, perceptions and the view that the process will not be transparent and cannot be trusted. This is understandable since the legacy of the Zimbabwean land reform process is close to home and the impact can still be seen today.

7 CONCLUSION

Most of the participants are of the opinion that land expropriation with or without compensation will have a negative effect on the ability of South Africa to produce food for



its local demand and will lead to increased food inflation, because food will have to be imported and with a weakening exchange rate will lead to higher prices. They also are of the opinion that EWC will have a larger negative effect than expropriation with compensation. These opinions correlate with the literature review and the Zimbabwean and Venezuelan case studies.

All the agricultural sub-sectors will be negatively impacted to some degree, but wheat and maize will be impacted the most. These sub-sectors are also the staple food of the South African population and will have a definite negative effect on food security and food inflation. This in turn can lead to social unrest as have been seen in the past.

Post land reform support, skills transfer, mentorship, transfer of ownership and access to finance are the major factors listed for a successful land reform programme. These factors might seem simple in the face of it but will require a large amount of commitment and willingness from all parties involved. These include the current owners, agricultural businesses, large retailers, food manufacturers, financial institutions, the State and the beneficiaries of the land.

It further seems the current sensitivities on EWC are based to a large extent on public perception and media sensationalism and the general population does not know the detail for EWC listed in the Bill.

Land reform is a given and is necessary for South Africa. However, it is clear that the execution thereof requires a far more considered approach in which post land reform support outweighs any other factors.

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