



The next Great Trek? South African commercial farmers move north

by Ruth Hall

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Abstract

This paper analyses the shifting role of South African farmers, agribusiness and capital elsewhere in the Southern African region and the rest of the continent. It explores recent trends in this expansion, investigates the interests and agendas shaping such deals, and the ideologies and discourses of legitimation employed in favour of them. While for the past two decades small numbers of South African farmers have moved to Mozambique, Zambia and several other countries, this trend seems to be undergoing both a quantitative and a qualitative shift. Whereas in the past their migration was largely individual or in small groups, now it is being more centrally organised and coordinated, is more frequently taking the form of large concessions for newly formed consortia and agribusinesses, and is increasingly reliant on external financing through transnational partnerships. As of early 2010, the commercial farmers' association Agri South Africa (AgriSA) was engaged in negotiations for land acquisitions with the governments of 22 African countries.

This paper presents initial findings from a Future Agricultures Consortium (FAC) study to document and analyse major land acquisitions by South African farmers and agribusinesses, the processes through which these have occurred and are occurring, their impacts, and implications for land rights, livelihoods and the changing shape of agriculture. The research considers the changing character, scale and location of South African investments elsewhere in the region and the continent; and focuses specifically on the AgriSA-Congo deal (the largest deal concluded thus far), and acquisitions by the two South African sugar giants, Illovo and Tongaat-Hulett, for outgrower and estate expansion elsewhere in the region. The study addresses the degree to which South Africa is no longer merely exporting its farmers, but also its value chains, to the rest of the continent – and what this means for trajectories of agrarian change.

1. Introduction

While for the past two decades small numbers of South African farmers have moved to Mozambique, Zambia and several other countries, this trend seems to be undergoing both a quantitative and a qualitative shift. Whereas in the past their migration was largely individual or in small groups, now it is being more centrally organised and coordinated, and is more frequently taking the form of large concessions for newly formed consortia and agribusinesses, and increasingly reliant on external financing through transnational partnerships.

This paper builds on a review of land deals in Southern Africa (Hall 2011) which noted among other trends the significant role of domestic and regional actors in what has often been considered ‘foreign’ land grabbing; the prevalence of deals for purposes other than food production (specifically biofuels, mining and forestry); and the ways in which what is being grabbed extends beyond the land, to water and other natural resources but also, as noted more generally by Li (2011), also the labour with which to exploit these, through a range of institutional forms and business models. One conclusion of that paper was that South African businesses are not merely relocating elsewhere in the region, but are acquiring land as part of wider business strategies to extend South African value chains. The actors and interests involved, then, are not merely those of ‘farmers’, but of a wide range of private and public sector actors in South Africa and in ‘host’ countries.

This paper picks up on these observations and analyses the shifting role of South African farmers, agribusiness and capital elsewhere in the Southern African region and the rest of the continent. It explores recent trends in this expansion, investigates the interests and agendas shaping such deals, and the ideologies and discourses of legitimation employed in favour of them. It presents the first phase of this work – relying on secondary sources, and as a precursor to fieldwork in Congo, Mozambique and Malawi – to document this expansion of South African farmers and agribusiness elsewhere in Africa, and reflects on three angles: (i) negotiations by commercial farmer association AgriSA to secure land leases for consortia of its members; (ii) the acquisition of land for estates and outgrower schemes by the major sugar companies; and (iii) the emerging models through which acquisitions are financed and new actors involved.

The paper does *not* address the totality of South African land-based investments elsewhere on the continent, which include other agricultural ventures and investments (other than by AgriSA and the sugar companies); mining; and coastal and safari tourism, among others.

2. Background: deregulation and regulation as ‘push’ factors

South Africa’s (still almost exclusively) white commercial farmers have over the past two decades experienced dramatic changes in their political and economic situation. A combination of pressures has put these farmers – once a primary political constituency of the National Party apartheid government – into new difficulties, both objective and

subjective. The new pressures have been well documented and arise from the dismantling of an elaborate architecture of policy and institutional support for commercial farming: agricultural deregulation including the removal of direct and indirect subsidies, state-controlled marketing boards with floor prices and pan-territorial pricing, cheap credit and tax breaks; the rapid liberalisation of trade in agricultural products; and sharp increases in the prices of key farming inputs, particularly diesel and electricity (Bernstein 1996, Vink and Hall 2010, Williams et al. 1998). Further pressures adding to the actual and perceived difficulties of pursuing commercial farming include the introduction for the first time of basic labour rights for farm workers in the 1990s, and since then also minimum wage regulations, the extension of tenure rights to farm workers and their families (Atkinson 2007) and the placing of historical land claims to large areas of commercial farmland by former black occupiers, owners and tenants, in terms of the Restitution of Land Rights Act, 22 of 1994 (Walker et al. 2010).

These pressures have elicited a number of responses on the part of South Africa's white farmers. One response has been the decision by many to exit farming, sell their farms and invest in new careers in other sectors of the economy. Indeed, the total number of commercial farming units declined precipitously from approximately 60,000 in 1996 to around 45,000 in 2002, and is currently just under 40,000; ownership of multiple farms suggests that these figures might even under-represent the scale of exit from commercial farming (NDA 2009). A second response has been diversification into non-agricultural sectors, or into up- or downstream activities. A third response has been either individually or collectively to move out of South Africa and elsewhere on the continent.

The South African Agricultural Union (SAAU), formed in 1904 to represent white farmers, renamed itself Agri South Africa (AgriSA) in 1999, a newly deracialised association of farmers' organisations, keen to recruit black membership and to build relations with the post-apartheid political dispensation and the ruling African National Congress (ANC). Chief negotiator for their commercial farmers is Theo de Jager, deputy president of AgriSA, who has led numerous delegations of farmers to meet with agriculture and foreign affairs ministers of countries offering land deals.

In contrast to AgriSA is the conservative Transvaal Agricultural Union (TAU) of South Africa – which refused to join this deracialised union – and which represents the agenda of white farmers battling to escape black rule, by betting on Georgia in the former USSR as the main new destination for its membership. TAU general manager Bennie van Zyl was invited on a three-month study tour, together with key advisors (TAU 2010) and reportedly concluded an agreement 'to send farmers who want to leave South Africa to Georgia' (Bloomberg 2011). This was backed up by a visit in February 2011 by 90 prospective new settlers to inspect land on offer (McGuinness 2011). The terms on which land is being offered by the government of Georgia have not been made known, though the South Africans involved suggest that:

... what the ANC is prepared to expropriate, the government of the Republic of Georgia is willing to give away for free. Is it possible that they know something about the character of the Boer-Afrikaner that the ANC just won't admit. When they [the ANC] lose the Boer, they'll lose the security of their food supply. When they lose that, what will they eat? (Phillips 2010 – original emphasis).

News headlines and right-wing websites warn of an impending 'exodus' of 'thousands' of white 'boer' farmers, that 'the last of the white farmers are about to depart for greener pastures' (Phillips 2010). Many predict disaster for food production in South Africa if this small, skilled community decides to emulate its predecessors – who in the 1830s and 40s, embarked on a 'Great Trek' from the Cape colony into the hinterland, and thence to establish the new Boer republics of the Orange Free State and Transvaal. Harking back to this iconic moment in the contestation between Boer and British – over labour and the abolition of slavery – the implication is that these resilient farmers are once again without a secure homeland. Images abound of farmers in khaki shorts and Springbok rugby caps visiting snow-covered Georgia in the former USSR, testing the soils of Libya, and imagining a new life in the Congo. Such images promote an understanding of those resistant to change in a new South Africa, of racist farmers fearful of a future under ANC rule. Elements of such a narrative may indeed be true in the views of some, including the members of TAU. Yet, as this paper shows, the current migration is far more complex, signifying largely *not* the fleeing one regime of a threatened 'boer' nation to establish a new order elsewhere, but rather a web of interlocking strategies: diversification, building of political alliances, extension of value chains, sourcing of patronage, and the consolidation of greater global market share (and days on the supermarket shelves of Europe). This is not to be understood (or written off) as the desperate knee-jerk reaction of alienated white Afrikaners unable to see a future for themselves in South Africa, but rather a realignment of interests, both domestic and global which, as I will show, is producing surprising new alliances.

3. Rebranding for the continent: 'AgriSA Africa'

In 2010, Agri South Africa formed an "AgriSA Africa committee... with a view to securing funding for those farmers who wish to extend their farming operations into other African countries" (AgriSA 2010a). The committee was tasked with liaison with African governments regarding land acquisitions and farming support. Two years ago, about 1,000 farmers had signed up to be part of the expansion into Africa, according to AgriSA chief negotiator Theo de Jager (Hofstatter 2009a). AgriSA considers the Congo deal as a pilot project which would guide the format for further AgriSA to government deals (Pienaar, in AgriSA 2010c). It has discursively constructed its land deals as development partnerships. A resolution from the AgriSA congress in October 2010 declared that: "Within [the] Southern African Development Community (SADC) and Africa it is essential to promote regional economies of scale in respect of primary and related development, i.e. joint projects must be developed" (AgriSA 2010b).

The South Africans have been actively networking with others negotiating for, and offering, land deals across the continent. A key such opportunity was the Conference on

Large-Scale Farming in Africa held in Cairo last year (21-22 April 2010). Here, AgriSA president Johannes Möller, claimed that South African commercial farmers want to move into Africa ‘as a result of scarcity of natural resources and land redistribution’ (Derby 2009). At this event, South Africa and Zimbabwe were agreed to be the only countries on the continent not safe as destinations for agricultural investment, because of concerns about land reform programmes and labour regulation (*Farmers Weekly* 2010).

South African farmers already have operations underway in Mozambique, Malawi, Botswana, Kenya and several other countries (Reuters 2010a). The terms vary quite substantially but, in the past year or two, diplomatic missions of various countries have made direct contact with AgriSA, offering preferential investment terms. Zambia, for instance, has offered to waive import duties and VAT, invest in roads and extend power grids in order to attract South African farmers to its two new 150,000 hectare ‘farm blocks’ available for colonization (ref? Reuters 2010a?). Among the recent South African farmland deals are for sugarcane by TSB (the sugar company formerly known as Transvaal Suiker Beperk) in Mali, sugarcane and palm oil in Madagascar, palm oil in Benin, jatropha in Mozambique, Tanzania and Zambia, and sugarcane in Zimbabwe and Namibia, among others (ILC 2011). Of the 16 major land acquisitions by South African companies elsewhere in Africa, three are largely for food crop production, 1 for carbon sequestration under the United Nations’ Reducing Emissions from Deforestation and Forest Degradation (REDD) and the rest (12) for agrofuels – either jatropha for biodiesel, sugarcane for bioethanol, or a combination of other feedstocks like maize, soya and palm oil (ILC 2011). The deal that is now off is the proposed allocation of 35,000 hectares of former state farms for grapes and olives in Libya (Hoffstatter 2009, Reuters 2011). During the second half of 2010, further talks got underway with Angola, Democratic Republic of the Congo (DRC), Egypt, Gabon, Guinea, Cameroon, Mozambique, Namibia, Senegal, Sudan, Uganda and Zambia (Bloomberg 2010, Groenewald 2010, Reuters 2010a, Reuters 2011). By late 2010, ‘AgriSA Africa’ was in negotiations for land with the governments of 22 African countries (AgriSA 2010a, Reuters 2010c).

4. The Congo Deal

The most significant recent deal offering African farmland to South African farmers has been concluded between AgriSA and the Republic of the Congo (Brazzaville, not DRC). In October 2009 the government of the Congo signed an agreement with AgriSA in terms of which it allocated to a consortium of South African commercial farmers an initial area of 200,000 hectares of former state farms, with the option of expanding to 10 million hectares – an area twice the size of Switzerland. The land in question consists of state-owned farms, neglected for many years following civil conflict. The land lies in the south-west of the country, between the capital Brazzaville on the Congo River and the provincial city of Point-Noire to its west, on the coast, and occupies much of the fertile Nyari Valley in the departments of Nyari and Bouenza (N’Zobo 2011, pers. comm.).

The country imports 95 percent of its food requirements, and its Agriculture Minister claimed that the deal would stimulate agriculture as part of Congo’s New Plan of Action

(SAPA 2009). Because of this reliance on imports, food prices in domestic markets (particularly for fresh produce) are high by international standards, which makes production for the local market attractive to the prospective settlers – yet their entry will arguably affect those local farmers already supplying this market, a point to which I return below. Although initially mooted as a 99-year lease, it appears that a renewable 30 year lease was signed, in terms of which no rental is payable, and which contains guarantees regarding the tariff-free importation of agricultural inputs, and unlimited rights to export produce, and for these rights to be heritable (N’Zobo, 2010 pers. comm.). Says de Jager, ‘farmers would pay no import duties or tax on equipment, unlike in SA where we are heavily taxed in many ways’; in addition, farmers would be able to repatriate profits to any part of the world, and receive a five-year tax holiday (Sharife 2010).

Soon thereafter, on 8 May 2010, the governments of South Africa and Congo concluded a new bilateral investment treaty, expanding the terms of pre-existing cooperation agreements dating from 2003 and 2005. This suggests not that the two countries did not have bilateral relations, or agreed terms for these, but rather that the terms are changing. Next, *pro forma* ‘Government to Farmer’ contracts were drawn up by AgriSA and Congo authorities: ‘The contract will apply more specifically to activities of individual farmers, the stipulation of boundaries and terms and conditions for farming activities. The agreement will help farmers... who establish businesses in the Republic of Congo, open bank accounts and start farming, with the protection of the said contracts and with all the benefits for the farmer as negotiated by AgriSA’ (Swanepoel, cited in AgriSA 2010c). The first contracts, for 88,000 hectares, were concluded between the South African farmers and the Congolese Ministries of Agriculture, Livestock and Land at a ceremony at Point-Noire on 10 March 2011 (N’Zobo 2011, pers. comm.). The next step, from AgriSA’s point of view, is to develop an affiliation structure for prospective Congo farmers, so that they have a local association of their own through which to voice their interests – presumably ‘AgriSACongo’ or something similar (Swanepoel in AgriSA 2010c).

Three ambiguities emerge from the many statements by the protagonists in this deal. These concern the South Africans’ motivation for the deal; who is occupying this land currently, if anyone; and what types of production are envisaged, for which markets.

First, the deal in the Congo (as with negotiations elsewhere on the continent) have been accompanied by narratives that rest on a developmental discourse of pan Africanism and good neighbourliness – suggesting that South African farmers are fulfilling a duty, as mandated by their government, to bring about development in other African states. This focuses on the need for increased productivity and supply to meet national food demand, and the transfer of skills and technology to enable the growth of indigenous small to medium scale commercial farming. According to the Agricultural Business Chamber, explaining to the Johannesburg Stock Exchange the benefits of such deals with South African farmers, Africa can gain through ‘technology transfer, employment creation, infrastructure development, GDP growth’ and also increased local food supply or domestic markets (Maluleke 2009). At the same time, AgriSA (and to a greater degree,

TAU) have emphasised ‘push’ factors: the need to escape government regulation and taxation and the threat of expropriation. Less prominent in these narratives are the obvious economic advantages of the cheap deals and preferable terms on offer. Andre Botha, president of Agri Gauteng, a division of AgriSA, encompassed several arguments when he explained that:

There are three main reasons we are in the Congo. The first is, of course, to diversify our businesses; the second is to assist local farmers to commercially develop their own land; the third reason is to assist the government of South Africa to fulfill the expectations of the world in stabilising the African continent through the exchange of skills and technology (Sharife 2010).

Second, the merits of the deal rest on what Cotula et al (2009) call an ‘idle land’ or ‘wasteland’ discourse – the claim that the land is unoccupied and unused. AgriSA’s expectation is that ‘the farmers will move into the houses on the property[ies]’ (de Jager, cited in Sharife 2010). Despite such claims, by both the government of the Congo and by AgriSA itself which describes it as ‘virgin land’, there is evidence not only that people live there, but also they have been farming on this land and consider themselves to have rights to remain there. A Congolese human rights organisation, the Observatoire Congolais des Droits d’Homme (OCDH), alleges that communities in the affected areas, which hold customary land rights, were not adequately consulted (N’Zobo 2010, pers. comm.). And though official sources claim that the land in this remote valley is vacant and unused, they have also promised that the local people would benefit from employment (SAPA 2009). OCDH reports that:

we know that in Bouenza’s Dihesse or Mantsoumba [which form part of the initial area leased to AgriSA], local communities have been using this land, which government abandoned decades ago. They had indeed planted manioc, groundnuts, etc. How come government does not provide technical and financial support to encourage this local initiative and increase yields? (N’Zobo 2011, pers. comm.).

Third, there are ambiguities regarding the types of production and their destination markets. While it has been reported that the 17 South African farming syndicates will focus on ‘producing grain and red meat for the local market and fruit for export’ (Bloomberg 2011), AgriSA has insisted that it will produce vegetables and poultry for the local market (Sharife 2010). One of the motives, though, appears to be to expand its market share and shelf space in European supermarkets: ‘The farmers will grow tropical fruit and hopefully give us an edge against farmers in South America where they traditionally beat us to the European markets by about a week’ (de Jager, cited in Sharife 2010).

Like so many instances of ‘land grabbing’, the deal has been characterised by a silence about those on the land – their rights, livelihoods and future – once the South Africans move onto these farms and ‘move into the houses’ that are still standing on them. But, as pointed out by de Schutter (2011: 258-9), even more obscured from view in many deals, and certainly in this one, are the potential impacts of the influx of large-scale commercial producers on *other* farmers elsewhere in the Congo who, without external financial and without the tax breaks and other preferential terms offered to the South Africans, will

compete with the new operators for domestic market share. On this, there is a total silence in all statements from both sides.

5. AgriSaMoz

Another current project of AgriSA Africa is the establishment of ‘AgriSaMoz’, an association of South African farmers in Mozambique to be launched in May 2011 at a function in Pretoria with senior government politicians and officials from both countries in attendance to affirm their support. According to AgriSA, the primary motivation for forming such an association is to enable individual commercial farmers to get expert advice (and political support) to secure land rights in their new country:

A request received in November 2010 at an agricultural investment conference in Xai-Xai in the Gaza province of Mozambique to the effect that South African farmers should register their interest in writing with AgriSA, had attracted wide response... Although land is inexpensive in Mozambique, the establishment of land use rights is a lengthy and time-consuming process. The process commences when a prospective land user identifies the land and negotiates with the local traditional leader to register such a right (usually for 50 years) (AgriSA 2011).

AgriSA was also negotiating further 50-year land leases in Mozambique in the past few months for land to grow sugar for ethanol, as well as tropical fruit and livestock. Authorities in Gaza province in the south of the country indicated that they were able to make available a million hectares to AgriSA members (van Burick 2010). ‘At this stage there are just over 800 farmers who have already established interests in Mozambique and seemingly another 800 are in the process of trying to tie up land, with a deal that is being closed with the Gaza province’ said de Jager (Reuters 2011). A prominent exponent of these deals, and a personal friend of Zuma, is Charl Senekal, who declared at the Xai-Xai meeting:

We are very anxious to provide and feed the Mozambican people with affordable food... Farmers wanting to diversify or who have lost their farms in redistribution have a new opportunity in Mozambique (Reuters 2010b).

He also faces a land claim on his R160 million farm in South Africa’s KwaZulu-Natal province. The meeting in Xai-Xai was organised not by AgriSA but by South Africa’s high commissioner in Mozambique, Dikgang Moopeloa, who explained the motive as being to create opportunities for South Africans, strengthen diplomatic links with Mozambique, and to promote development and regional stability across the Southern African Development Community so as to ‘stem the inflow of migrants to SA’ (SAPA 2010). The meeting took place against the backdrop of protests against rising food prices, which left several people dead, shot by security forces in Maputo in September 2010.

6. The government connection: funding, political support and BITs

The major constraint on further deals is the absence of bilateral investment treaties to secure investors’ assets and the right to repatriate profits (Cotula and Vermeulen 2009).

From a South African agribusiness point of view (a view shared with its partners in the Southern African Confederation of Agricultural Unions, representing largely the interests of commercial farmers), this is the precondition for implementation that has scuppered (or at least delayed) several in-principle agreements for allocation of farmland in other countries in the region (SACAU 2010).

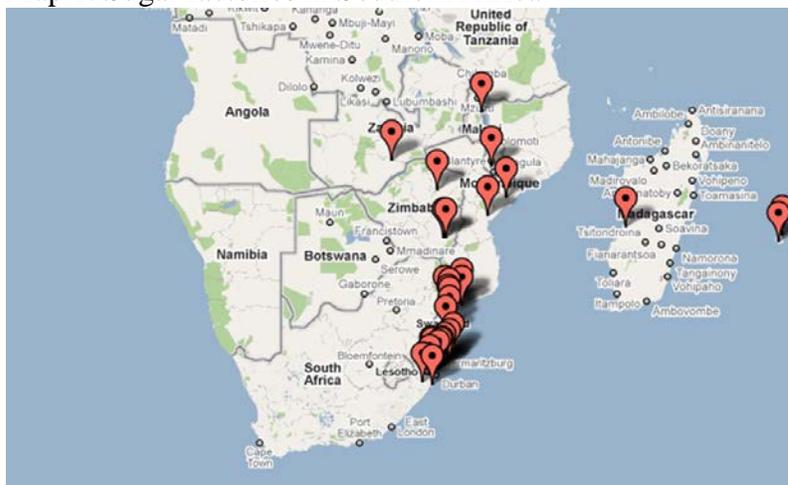
In support of business expansion, the South African government has signed and updated numerous bilateral investment treaties – in the past three years alone, with Angola, Cameroon, DRC, Gabon, Guinea, Ethiopia, Madagascar, Mauritania, Namibia, Sudan, Tanzania, Zambia, and Zimbabwe. These are mostly cited as ‘Agreement[s] on Promotion and Reciprocal Protection of Investment’ (plus related protocols), but there are many more memoranda of understanding on ‘Cooperation in the Field of Agriculture’ or ‘Mining and Minerals Beneficiation’ and agreements to avoid double taxation.

Recently, the export of South Africa’s agricultural skills became government policy, when Minister of Agriculture, Forestry and Fisheries, Tina Joemat-Pettersson, announced a R6 billion fund for supporting South African farmers, half of which would be spent on projects beyond South Africa’s borders (Farmers’ Weekly 2010). She was previously quoted as saying ‘If we can’t find opportunities for white South African farmers in this country, we must do it elsewhere in the continent’ (Hoffstatter 2009a). This she characterised as “an equal relationship between people of the African continent” (Joemat-Pettersson cited in Hoffstatter 2009a).

7. The sugar

South Africa’s two sugar giants, Illovo and Tongaat-Hulett, are the products of decades of subsidy and trade protection. Both have rapidly reinvented themselves as regional businesses, and now operate in six countries each in Southern and East Africa. Sugar has long occupied a special place in South African agricultural policy, being the only commodity which – a decade after the closure of the last state marketing boards – still benefits from state-imposed price controls. Both companies have adjusted to new pressures and opportunities by reconfiguring their asset and production portfolios. Since the 1990s they have embarked on three modes of expansion: purchase or lease of state-owned estates (for example in Malawi, Mozambique and Zambia); outgrower schemes where they establish core estates and mills while also entering into supply contracts with neighbouring small-scale farmers; and contract farming only, to supply existing mills. Together, these companies now account for nearly half the sugar factories in Southern Africa (see Map 1).

Map 1: Sugar factories in Southern Africa



Source: <http://www.sugartech.co.za/factories/groupmap.php?regid=7>

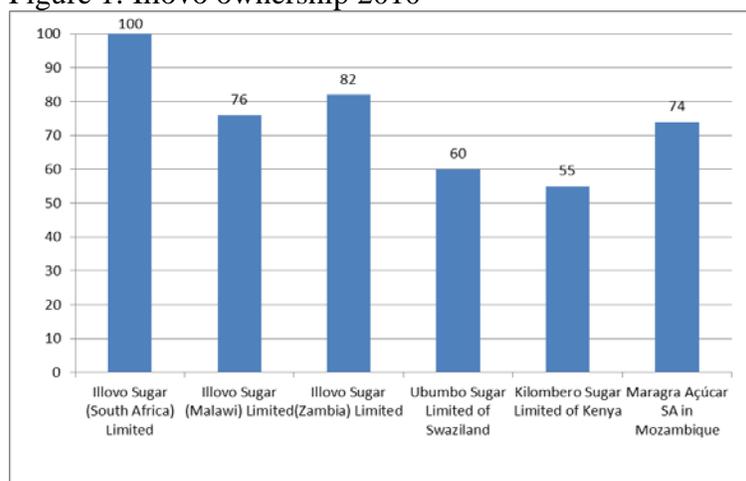
Both Illovo and Tongaat-Hulett have expanded substantially year on year through the food and financial crises – their financial statements show no symptoms of the recent global recession (Illovo 2010). The main driver behind the sugar boom in the region is massive increase in global demand, due to a combination of major markets (such as India) becoming net importers, and rising demand for bioethanol buoyed by targets (notably in the European Union) for renewable fuel content (Biopact 2010, Richardson 2010). Its fungibility – as food and as fuel – makes sugar a relatively safe hedge against fluctuations in demand. Added to this are the different institutional models for production (outgrower, estate and combinations) which provide options to adapt to local conditions, and vary the degree of fixed investment required.

Meanwhile, the South African sugar industry is lobbying hard at home for mandatory renewable content in fuel supplies, and for billions in state subsidies to enable it to meet this demand. Already, though, these sugar companies are diversifying far and wide, from the industry’s traditional products of sugar and molasses into derivatives like furfural, furfuryl alcohol, diacetyl, 2,3-pentanedione, natural methanol, ethyl alcohol and lactulose, which Illovo now sells to 81 countries. In addition, BioMass Sugar, “a liquid organic fertiliser derived from sugar cane, is being sold to a growing number of international markets” (Illovo 2010). The next big step to shore up sugar demand (and prices) is production of by-products from the cane – ‘co-generation’ of ethanol and biomass – which can feed into domestic electricity supply. This would be a boon for host governments, but is still largely in the realm of vague promises for the future.

Illovo now owns not only its South African operations, but is a majority shareholder in five other ‘Illovos’ across the region (see Figure 1). The point here is that the expansion is largely in partnerships with domestic investors or governments. Illovo’s own description of its ‘group strengths’ emphasises its African (rather than South African) character, and its geographic diversity as key to its resilience, when it defines itself as an ‘African sugar producer with African expertise in sugar cane agriculture, sugar manufacturing and the production of high-value downstream products’ and having ‘wide

geographic and climatic spread of core interests with good access to secure water supplies for irrigation' (Illovo 2010). In fact, Illovo's rise was on the back of cheap buy-ups of ailing government estates in during the 1990s in Malawi, Mauritius, Swaziland and Zambia (Richardson 2010), on the basis of which it has been involved in a second-wave expansion in the past 5 years.

Figure 1: Illovo ownership 2010



Source: Illovo 2010

At the same time, production in South Africa is declining and rapidly being eclipsed by other countries (see Tables 1 and 2 below). The milling capacity (for sugar refining) is still the highest in South Africa, whereas elsewhere increases in sugarcane output are largely for ethanol rather than sugar.

Table 1: Illovo production statistics: sugar cane ('000 tons)

Country	2010	2009
South Africa	361	464
Malawi	2 136	2 122
Zambia	1 705	722
Swaziland	804	741
Tanzania	614	555
Mozambique	488	450
Total	6 108	5 054

Table 2: Illovo production statistics: sugar ('000 tons)

Country	2010	2009
South Africa*	663^	922
Malawi*	295	304
Zambia*	315	194
Swaziland*	211	210
Tanzania*	120	118
Mozambique	81	76
Total	1 685	1 824

* - Sugar cane supplied by the group's own agricultural operations and private growers

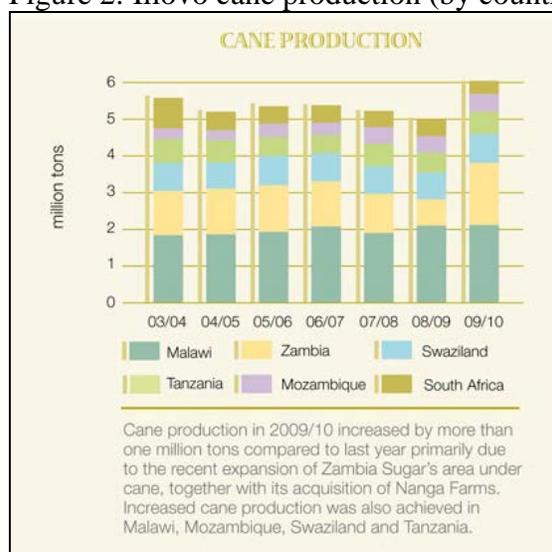
^ - Excludes Pongola and Umfolzi [sic] - sold

Source: Illovo 2010

Equivalent information has not been made publicly available for Tongaat-Hulett. What is known is that through the mid-2000s they were expanding their Zimbabwean estates, aiming for 1 metric tonne per year at the Triangle and Hippo Valley plants, converting these into bioethanol plants, and were expanding in Mozambique at Xinavene and Mafambisse (Biopact 2007).

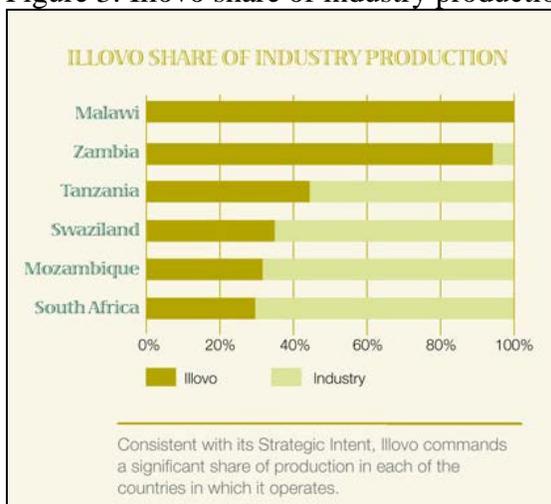
Rather than simply increasing output, one of the motives for this expansion appears to be improved access to international markets. Producing and exporting from Mozambique and Malawi, for instance, enables these South African companies to benefit from the EU sugar reforms that offer preferential trade terms with least developed countries (LDCs) (Biopact 2007). Together, the South African, Malawian and Mozambican governments have jointly lobbied the EU (and its Environment Committee) to relax its proposed biodiversity requirements, arguing it was punitive to force LDCs to demonstrate that changes in land use – ‘should not disproportionately penalise countries rich in biodiversity with unjustified, wide-ranging restrictions on the sustainable use of their territories’. Similarly, “The [South African] farmers in northern Sudan should be able to utilize a preferential sugar trade agreement between Arab nations” explains de Jager (Bloomberg 2011).

Figure 2: Illovo cane production (by country and financial year) in million tons



Source: Illovo 2010 http://www.illovo.co.za/World_of_sugar/Sugar_Statistics/Illovo_Group.aspx

Figure 3: Illovo share of industry production (percentage by country) in 2010



Source: Illovo 2010 http://www.illovo.co.za/World_of_sugar/Sugar_Statistics/Illovo_Group.aspx

One response to criticism of the expanding sugar industry, including concerns about unfavourable terms for contract farmers, is the Better Sugarcane Initiative (BSI), a pre-emptive response driven by the South African Sugar Association (SASA) as a way in which the industry could define its corporate social responsibility (CSR) standards. This initiative is equivalent to the ‘roundtables’ on soy and palm oil, initiated by the World Bank’s International Finance Corporation (Daniel and Mittal 2010). The Corporate Europe Observatory (2009) describes BSI’s multinational character thus:

Most of BSI’s members come from industry and the steering committee is dominated by big companies including Cargill, Tate and Lyle, Coca Cola, British Sugar, and the oil giants Shell, and BP, alongside European and American NGO’s such as WWF and Ethical Sugar. No trade unions or rural community organisations from sugar-growing areas are involved.

8. An aside: engineering and construction interests

While Ben Richardson (2010) talks of ‘Big Sugar’ to describe the conglomeration of multinationals that dominate the industry, I argue that it is important to recognise that behind this expansion are the interests not only of sugar companies, but a complex of commercial interests that span different sectors. Many of those who stand to profit from large-scale land deals are not involved with farming at all. Interests in the expansion of sugar production in the region extend beyond these two companies, to a substantial industry involved in the construction and management of new sugar mills and related estates and outgrower schemes. Also worthy of mention are those involved with logistics, transport, cold storage, financial services, and so on.

A notable example of this wider set of interests in the sugar industry is PGBI consulting engineers. This South African company is one of the top recipients of contracts to build sugar mills and ethanol plants in Africa (Eweg 2010, pers. comm.). It was also commissioned by the International Finance Corporation, part of the World Bank Group,

to produce a guide for investors in sugar industry on how to deal with land, social, environmental issues to the satisfaction of financiers. PGBI works in Zimbabwe, Swaziland, Tanzania, Mozambique, Zambia, Mali, Ghana, Ethiopia, Kenya (for Mumias, the continent's largest sugar factory) and Sudan (for the Saudis and, soon, likely also for the South Africans) (PGBI website 2010). As well as providing professional services to sugar companies, PGBI plays a number of other roles, working for their financiers, for governments, and is itself an investor – it is listed as a shareholder in the 10,000 hectare allocation of land in Caprivi, Namibia, for sugarcane production (ILC 2011). The point is that beyond the sugar companies themselves, there are associated service and consulting industries, and there is enormous circulation of people between industry and consultancies to these, including those auditing conditions, and much of this is far from public view. It is worth looking into how these interests work out in practice.

9. The banking connection

With the decline of South Africa's state-owned Land Bank, and the withdrawal of access to subsidised credit for white farmers as part of the wider deregulation process of the 1980s and 1990s, South African commercial banks have emerged as primary lenders to agriculture. Now those which may support AgriSA's continental expansion are three commercial banks: Standard, ABSA and Standard Chartered (Reuters 2010a). Standard Bank is at the forefront. At the same time, the 'South Africanness' of these banks – and the financial backing behind the farming expansion – is becoming more questionable. First, several South African banks have been acquiring substantial acquisitions of shares in banks in Africa; for instance Standard Bank recently acquired 90% of Uganda Commercial Bank, taking over its loan book and clients. Second, shareholding of these once 100% South African-owned banks is now diversifying. The Chinese stake in Standard Bank is growing, starting with the acquisition in 2007 of a 20% stake in this the oldest established South African bank, for \$5.5 billion by the Industrial and Commercial Bank of China. This was followed by a club loan by 5 Chinese banks for \$1 billion in 2009. These deals involved the Chinese acquiring existing shares, but also new shares – and so apparently funding new expansion. Incidentally: Standard Bank was at the Cairo conference.

10. The China connection

More direct China-South Africa partnerships are under negotiation – not only for finance but also for more substantive cooperation. The multilateral policy context for these new partnerships is the Forum on China-Africa Cooperation (FOCAC) concluded between the African Union and China, and established in 2006 with \$35 billion to finance Chinese investment in Africa. One proposal under discussion is Chinese research and funding, through its parastatal institutions, for South African experimentation with genetically modified seed varieties, crop varieties and water management in its landholdings elsewhere on the continent. 'They're aware South Africa has a research problem at the moment and they know they need farming skills for the land they're acquiring in Africa'

(Christie 2010). The breakthrough in the partnership between AgriSA and China was at the Cairo conference; as AgriSA's lead negotiator for African land, de Jager, confirmed: 'They asked us to find land for them, so that if we all reach an agreement, they can immediately start with experimental work' (cited in Christie 2010). In such ways, agricultural investments through bi- (and multi)lateral agreements between South Africa and other African states are framed as regional and Pan-African integration – as opposed to land grabbing and Sino neo-imperialism.

Agri SA deputy president Theo de Jager also said the farmer's group would within the next two months visit China to conclude an agreement over joint investment ventures with Chinese public firms in agriculture on the African continent (Shacinda 2010).

It has not been possible to verify whether this visit took place and, if so, its outcomes.

11. The investment funds

A further way in which South African actors and interests are involved in large-scale land acquisitions elsewhere on the continent is through investment funds. Emergent Asset Management is a jointly registered UK/SA management firm, previously focused on hedge funds in international financial markets, and now specialising in farmland investments in Africa. Two of its flagship products are the 'African Agricultural Investment Fund' established late 2008, and the 'African Land Fund' established in 2010. The latter, through a partnership with Grainvest, one of the top five companies listed on the South African Futures Exchange (SAFEX), has formed Emvest Agricultural Corporation which constitutes the operational side of these two funds' investments in land and agriculture. Together, these funds offer a vehicle for South African, UK and other investors to diversify their investments into African agriculture, and by late 2010 had secured land holdings in Angola, Botswana, DRC, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, South Africa, Swaziland, Tanzania, Zambia and Zimbabwe (EAML 2010). Remarkable increases in value and yields would be generated through 'modern farming techniques and technologies, while agglomerating farms to increase efficiency and generate economies of scale (EAML 2010). The African AgriLand Fund:

brings together the key themes of agriculture/food security, Africa, socially-responsible investing (SRI) and economic sustainability, purchasing and managing a wide spectrum of agricultural properties across the sub-Saharan region, with investments diversified across both geographically and across agricultural sectors - including crops, biofuels, livestock, game farming and timber. Returns, based on those successfully achieved through a 4-year pilot project, are projected to be approximately 30% per annum over the Fund's 5-year term (EAML 2010).

The European report on financial speculation and private equity funds as drivers of land deals – entitled 'The Vultures of Land Grabbing' –concludes that 'In short, private equity funds not only have a speculative business model, but also represent a conveyor belt for shareholder capitalism from the financial to the real economy' (Merian Research & CRBM 2010, p. 1). Susan Payne, head of EAM, was previously at JP Morgan and then

executive director at Goldman Sachs, which is itself one of the institutions at the forefront of this new model of hedging against international market fluctuations by investing in farmland. The Fund demands a minimum investment of €500,000 from private investors and €5m from institutional investors, and claims to offer secure and diversified investment packages. Its selling point is explicitly as a vehicle to capitalise on cheap ('undervalued') African land.

EmVest has been created as a dedicated agricultural operating and fund management company to execute the strategy. It is based in Pretoria, South Africa and is dedicated to the development and management of the Fund's assets. EmVest is establishing farming hubs throughout the region, working with national and local authorities to develop large scale agriculture on a commercial basis, within a socially responsible framework, at a consistently high level of execution... The Manager buys agricultural land and manages a wide spectrum of agricultural projects, spread across different commodities. It invests across 14 countries in sub-Saharan Africa, where land is substantially undervalued compared with arable real estate on other continents (EAML 2010).

Questions for further research must include precisely where and how they are investing, via whom, and what kinds of land uses and social relations are being produced through this influx of global capital. Importantly, to what extent is the capital focused on speculative holding of land on a short-term basis, or on investment in durable production? Spectacular promises of profits – as 30% returns to investors per annum – hint at the latter.

12. Conclusions

While the 'land grabbing' discourse has tended to focus broadly on 'foreign' actors (governments and companies) and, in the context of Africa, on actors from outside the continent, what this paper demonstrates is the rise of *intra-regional land grabbing*. Powerful narratives used to describe large-scale land acquisitions in Africa and elsewhere in the developing world emphasise historical precursors and suggest a return to old patterns of colonial enclaves and mercantilist colonialism. Yet growing evidence suggests new dynamics and different actors in the latest phase of 'land grabbing'. Most obvious is the rise of South-South deals, led by the emerging powers like the BRIC countries (Brazil, Russia, India and China). Also widely acknowledged is the role of the Gulf States, moving away from reliance both on costly and intensive irrigated production at home, and on risky reliance on global commodity markets to meet their national food needs, and towards offshore production instead. But a further such dynamic that merits further empirical investigation and theorisation is the intra-regional character of many such land acquisitions and investments. It is not surprising, in the context of 'rising global interest in farmland' – the euphemistic phrase deployed by the World Bank – that those regional powers that are well placed both politically and economically to act as initiators, brokers, might be among the most significant beneficiaries of this new wave of transnational land leasing. South Africa is undoubtedly one such country.

This paper interrogates the discourse promoted by commercial farmers themselves that they are seeking greener pastures elsewhere in Africa because the new democratic

government is driving them out of business – embarking on land reforms, threatening land expropriation, imposing labour regulation and minimum wages, increasing taxes and exposure to competition from imports, while setting high prices for key inputs (in addition to labour) like diesel and water. This discourse is useful to them – and perhaps true in the view of some – but it appears that there is a far more economically and politically nuanced strategy at work: on the economic side, these farmers are diversifying rather than leaving South Africa. None of the farmers signing up for land in the Congo intended to sell their South African operations, and of those considering Libya (last year), most intended to remain based in South Africa, and employ managers (Libyan or South African or other, it was not clear) to manage their operations (Hoffstatter 2009, Sharife 2010).

What exactly then might South African ‘farmers’ be bringing to the rest of Africa, if (as in some cases so far) they get the land for free, do not bring the capital, and do not manage the farms? That they might contribute social (even political) capital seems somewhat far-fetched, but clearly there is an agenda about building a platform as ‘African farmers’, in the eyes of their own government, and in the eyes of global investors to whom they look for finance. In this context, a narrative of Afrikaner farmers as hardy, innovative and enduring has been actively cultivated by South African farmers and agribusinesses, to convince African governments that, unlike European or Asian investors, these are ‘expert commercial farmers [accustomed to operating] under tough African conditions’ (Hoffstatter 2009).

There is a certain poignance in what has been described as the “white tribe of Africa” – predominantly white (male) Afrikaner farmers – finding, or claiming, that they are not valued in a new South Africa, and seeing the expressed demand for their skills as affirmation of their ‘African-ness’ and a sense of a place and role in the future of Africa as a whole. Andre Botha, a livestock and maize farmer who heads AgriSA’s Gauteng branch, said it should *not* be seen as ‘another Groot [Great] Trek. This is not running away — it is a calculated process of helping Africa take up its rightful place in the world. All over Africa the message we get is: we are looking for South African farmers, which is incredibly important for us. It means that our contribution to the future of this continent is valued’ (Hoffstatter 2009).

Explicitly, the South African farmers are *not* going elsewhere on the continent to secure food supplies for South Africa. They are going to find cheap land, water, labour and more lenient tax conditions from which to export to whichever markets appear the most lucrative – though they may be constrained by deals that require some domestic sales, and by financiers that demand that some/all of output be exported to the country financing these investments, like China. Though this trend takes the form of South African deals elsewhere on the continent, the phenomenon cannot be fully understood as ‘South African imperialism’ in Africa. The interests shaping it, the financing and the destination markets, extend far beyond South Africa. This is global capitalism.

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