

Omri van Zyl

Uitvoerende Direkteur: Agri SA

7 September 2016



Agri Noordwes Kongres

Die rol van Agri SA en sy affiliasies in „n
Omdraai-strategie vir Landbou

Droom ...

Brakpan se Boer soek n vrou !



(Doringdraad grapblad)

Suid Afrika as die broodmandjie van Afrika



Agtergrond Inligting

PESTEL Analysis

Suid Afrika – vuurhoutjeboks analise



Suid Afrika

Landbou

Ekonomies



Klimaat



Polities



Ekonomies



Sosiaal



Sosiaal



Tegnologie



Organisasie



Regstelsel



Regstelsel



Infrasruktuur



Beleid



Game changers

Game changers

ECONOMIC OUTLOOK 2016



BNP PARIBAS
FORTIS

The bank for a changing world

ANC

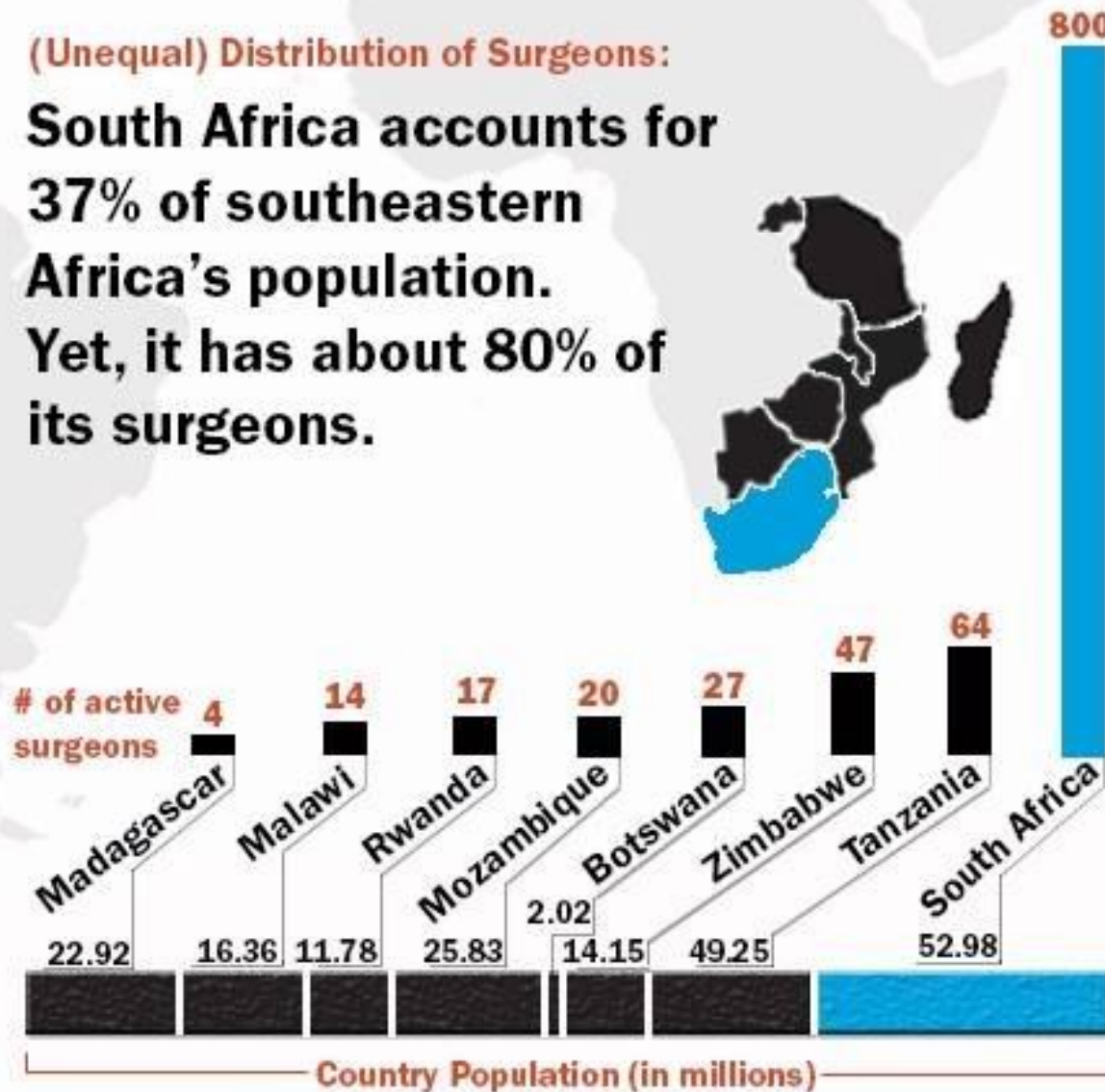


Africa en Europa



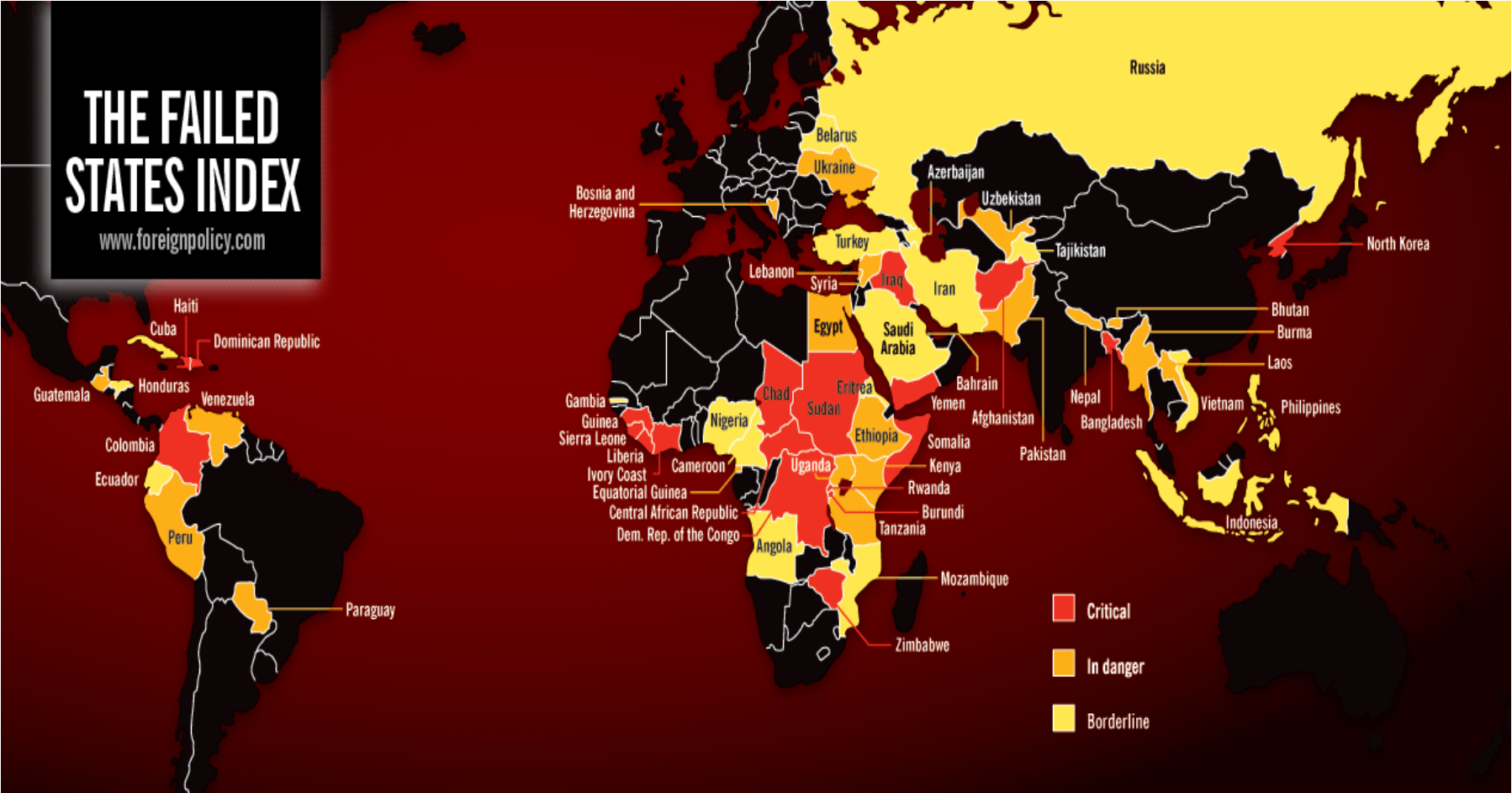
(Unequal) Distribution of Surgeons:

South Africa accounts for 37% of southeastern Africa's population. Yet, it has about 80% of its surgeons.

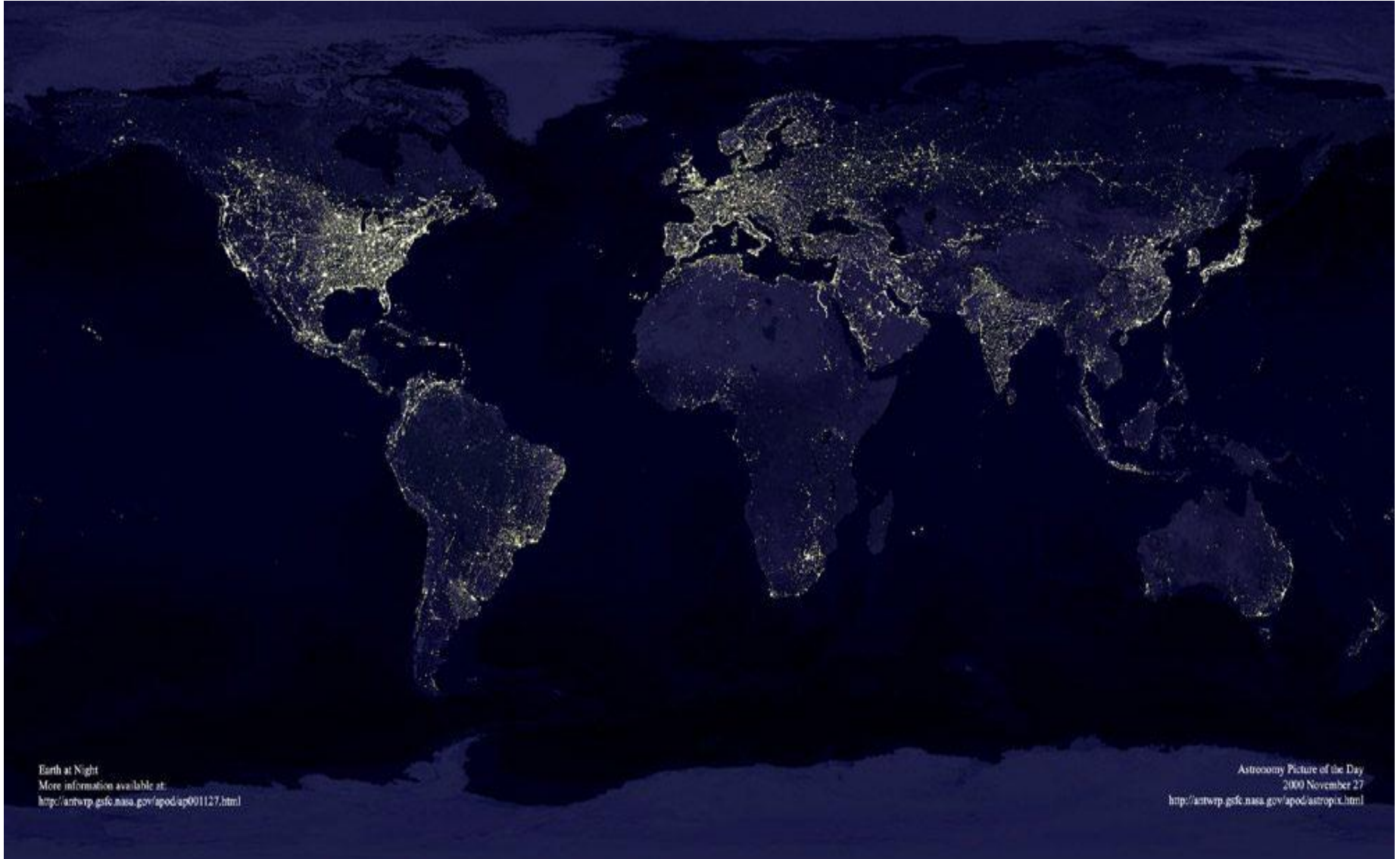


Note: This data mostly comes from a 2013 study published by the World Journal of Surgery. There are many conflicting national-level figures on surgeons, however, and so this count should be seen as estimate. The Boston figures only reflect the total of surgeons at Tufts Medical Center and Massachusetts General Hospital.

Failed state



Wereld energie – nag foto

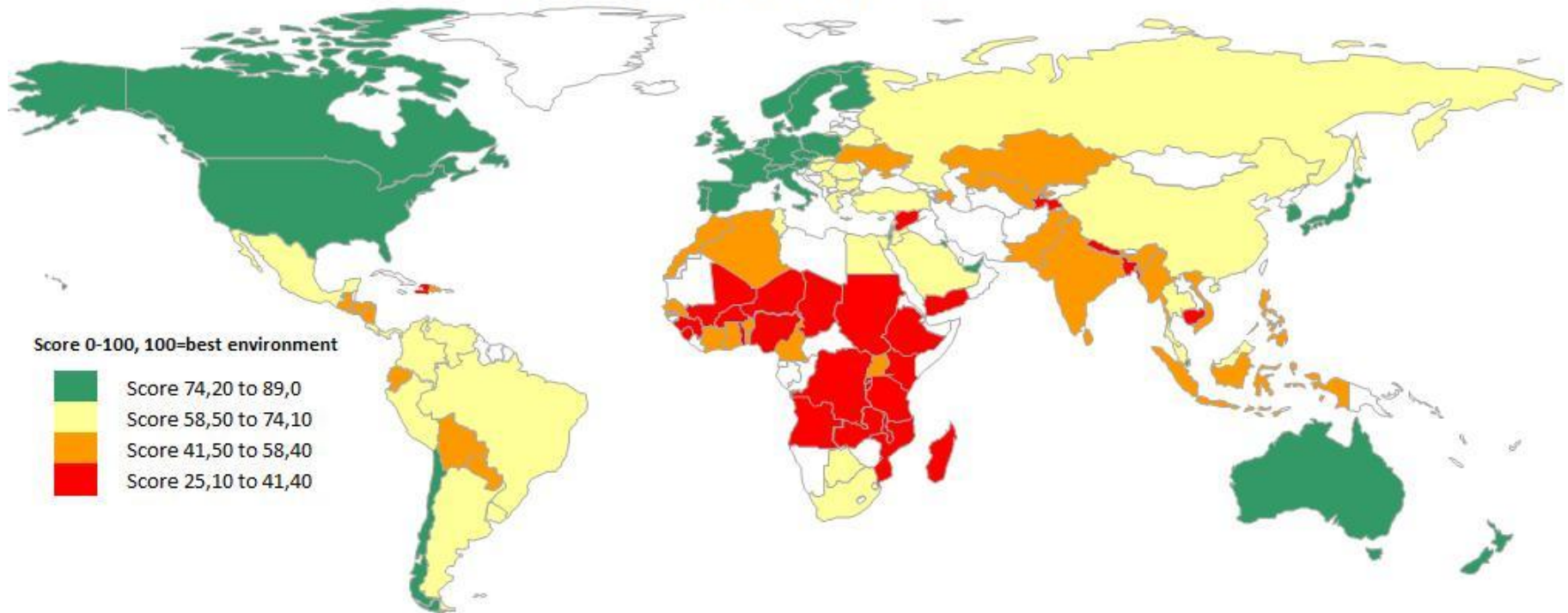


Earth at Night
More information available at:
<http://antwip.gsfc.nasa.gov/apod/ap001127.html>

Astronomy Picture of the Day
2000 November 27
<http://antwip.gsfc.nasa.gov/apod/astropix.html>

World food security index

2015 Global Food Security Index



Countries are grouped in quartiles so that the best scoring 25% (i.e. top 28 countries) are placed into the first group ("Best environment"), the next 25% are placed into the second group ("Good environment"), the next 25% are placed into the third group ("Moderate environment"), and the worst scoring 25% are placed in the fourth group ("Needs improvement"). Where countries have equal scores, the number of countries in each group will not always be exactly the same because of the ties.

Hunger in SA

More than half the population struggles to eat regularly

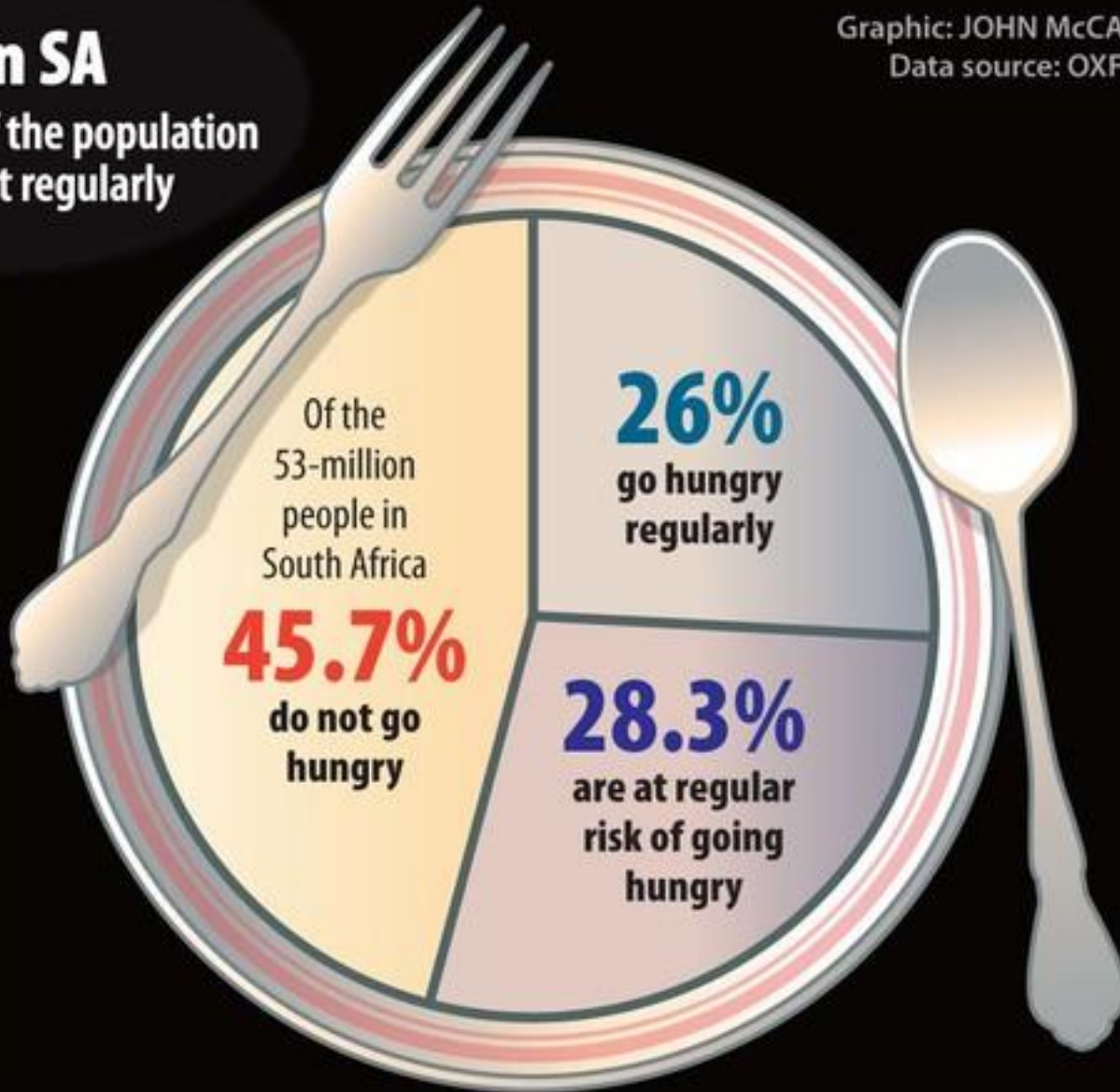
Graphic: JOHN McCANN
Data source: OXFAM



The top tenth of households spend **10%** of their income on food



The bottom quarter spend **48%** of income on food





Future farm





Bio-tech & Nano-Tech



Generasies

SO WHO ARE THE DIFFERENT GENERATIONS?

Here is how they are often grouped:



TRADITIONALISTS:
Value authority and a top-down management approach; hard working; 'make do or do without'.



BABY BOOMERS:
Expect some degree of deference to their opinions; workaholics



GENERATION X:
Comfortable with authority; will work as hard as is needed; importance of work life balance.



GENERATION Y:
Respect must be earned. Technologically savvy; goal and achievement oriented.



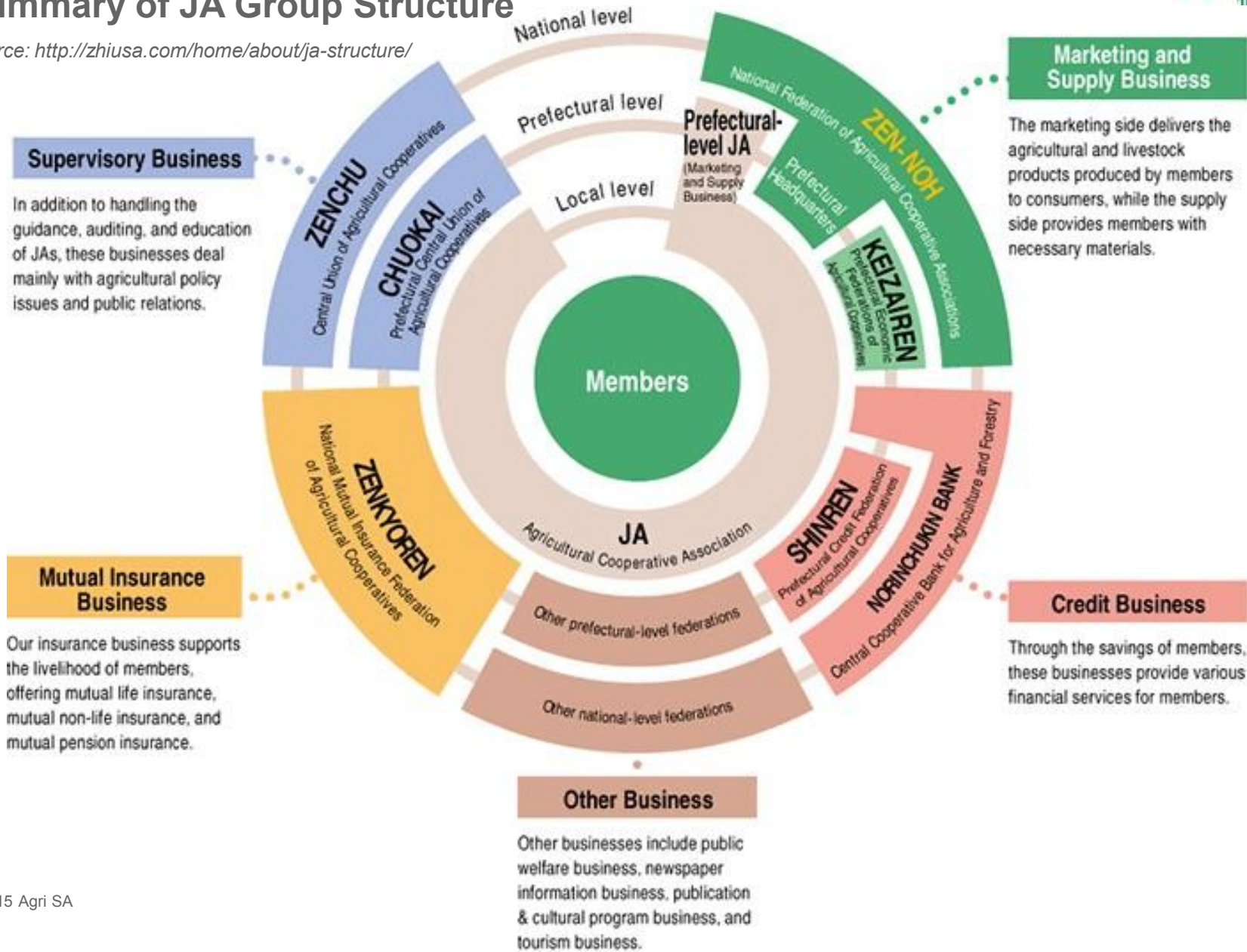
GENERATION Z:
Many traits still to emerge. Digital natives, fast decision makers, highly connected.

International Best Practices in Organised Agriculture

International Best Practices: Japan (continued)

Summary of JA Group Structure

Source: <http://zhiusa.com/home/about/ja-structure/>



International Best Practices: Australia



Australia's success: Blueprint process focusing on seven themes (2013-2020)

First sector-wide cooperative effort to set out future path for agriculture up to 2020, and towards 2050:

- The role of the Blueprint is to **identify major issues and priorities shared** across the Australian agricultural sector, **articulate broad strategies** to deal with them, **suggest pathways for implementation** and **drive greater coherence and coordination** of the agriculture sector's efforts into the future.
- **Forging greater cooperation** by providing a starting point for discussion and collaboration on the issues that are shared across the agricultural sector.
- Although spearheaded by the National Farmers' Federation (NFF), **stakeholders from the entire sector and agricultural supply chain** were included during development of the blueprint (agricultural sector bodies, agribusinesses, farmers, consumers, education bodies, government, and non-profit and community organisations).
- Main value lies in **bringing the players in agriculture together** and onto the "same page" in terms of a desired future for the sector, and coordinating their actions to bring this about.
- Blueprint process is discussed in stakeholder forums coordinated by the NFF to take the **broad strategy** ideas and **turn them into specific, time-bound actions**, assign **responsibility** for carrying them out, and identify **what resources** will be needed.

International Best Practices: Australia (continued)



Australia's success: Blueprint process (2013-2020)

Seven themes and their issues to be addressed:

1. INNOVATION AND RESEARCH,
DEVELOPMENT AND EXTENSION

2. COMPETITIVENESS

3. TRADE AND MARKET ACCESS

4. PEOPLE

5. AGRICULTURE IN SOCIETY

6. NATURAL RESOURCES

7. TRANSFORMATIONAL ISSUES

A large green hexagon with the word "THEMES" written in white capital letters inside it.

THEMES

International Best Practices: Australia (continued)



NFF Strategic Plan (2010-2013)

Integrated strategic package with goals and objectives around five key pillars:

NFF Strategic Plan

Increase the productivity and competitiveness of the farming sector

Secure and grow domestic and international markets

Effective and sustainable natural resource management

Focus on people (labour, skills, farm safety and service delivery)

Improve community perception and awareness of Australian agriculture

International Best Practices: Netherland



Netherland's success as world's 2nd-largest agri-exporter (2014)

5 reasons why Netherland is a leader in agricultural production and the food industry:

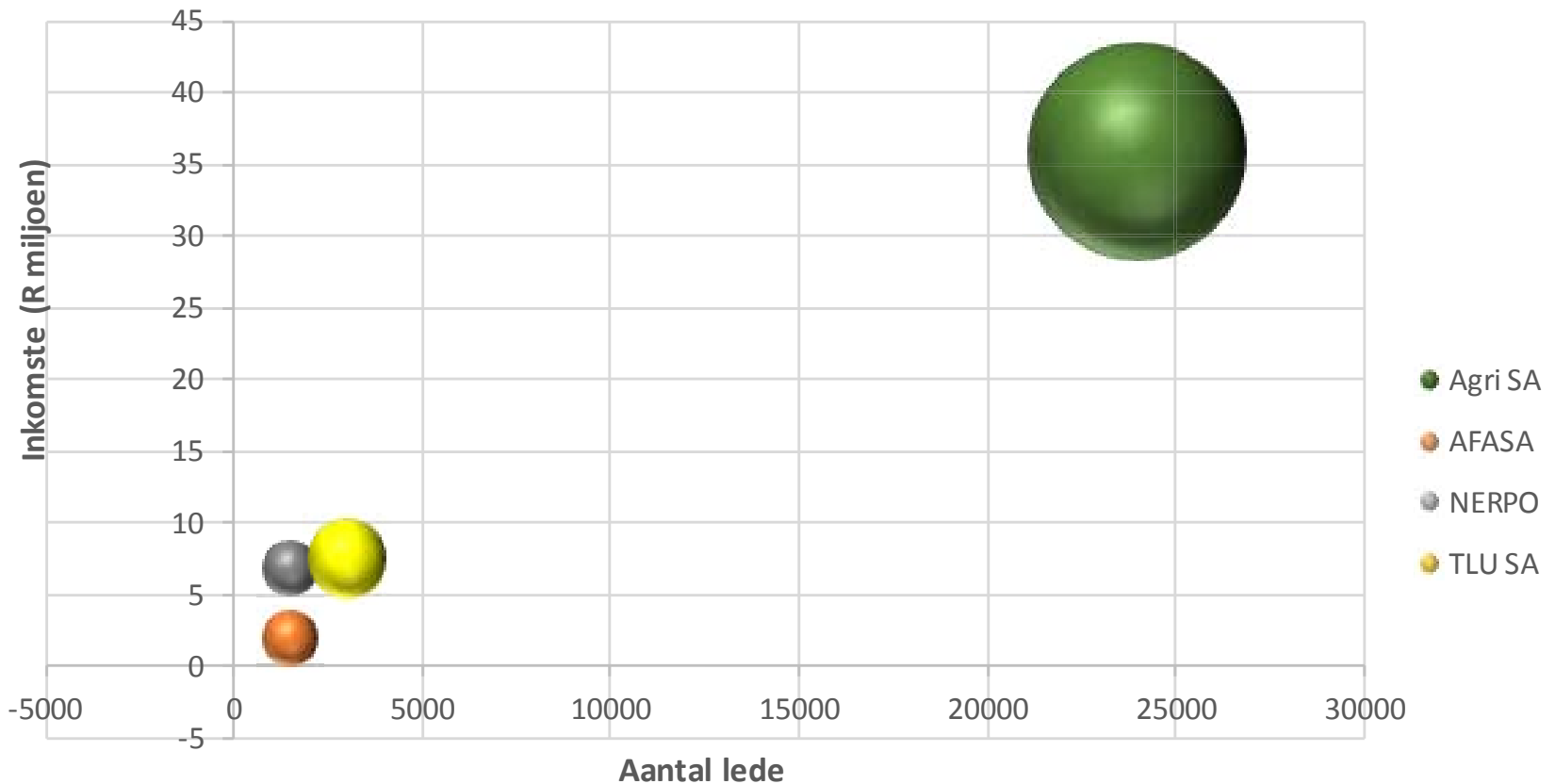


Suid-Afrikaanse Landbou Landskap

Suid-Afrikaanse landbou-organisasies



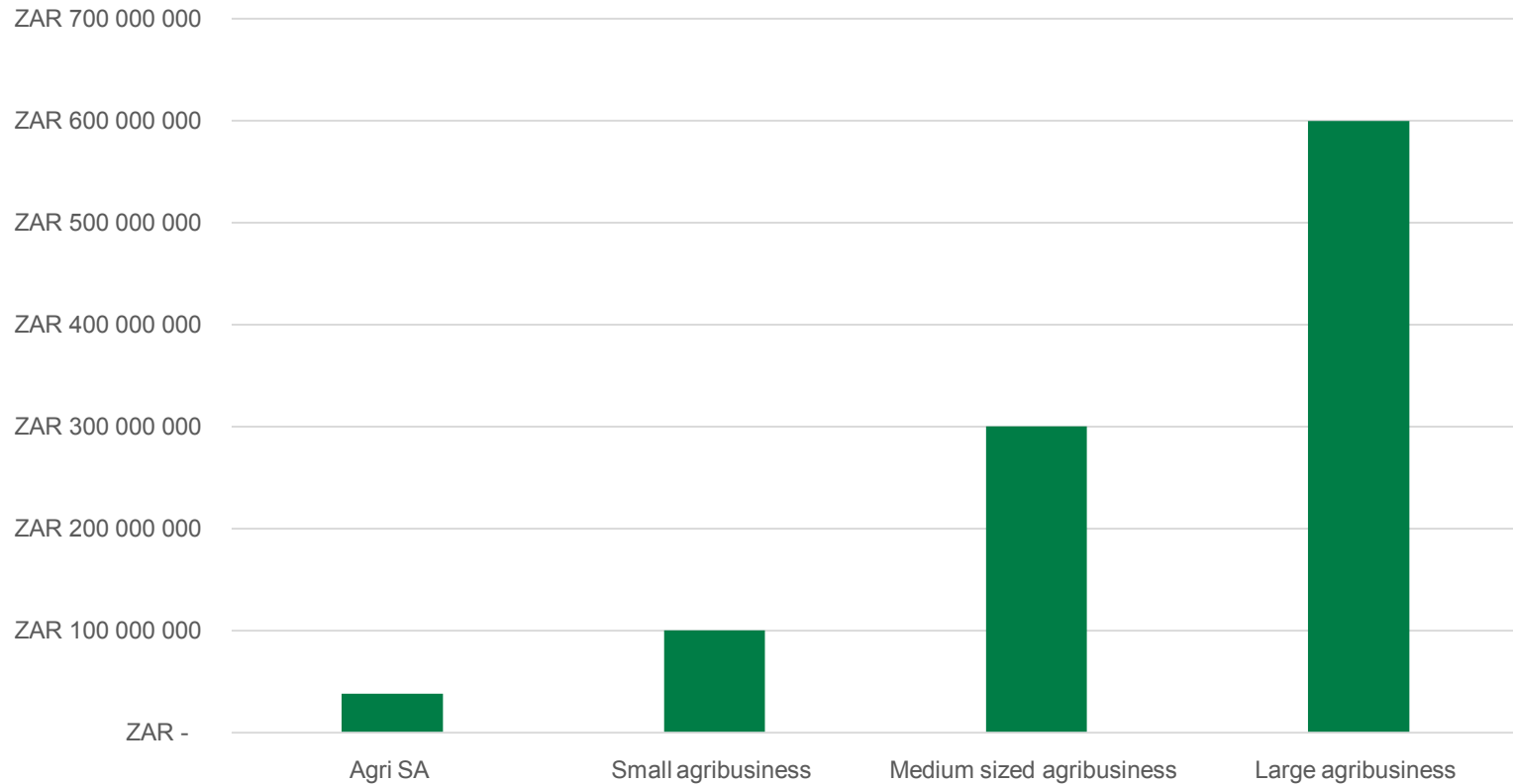
Vergelyking tussen SA landbou -organisasies



Begrotingsvergelyking



Vergelykende grootte

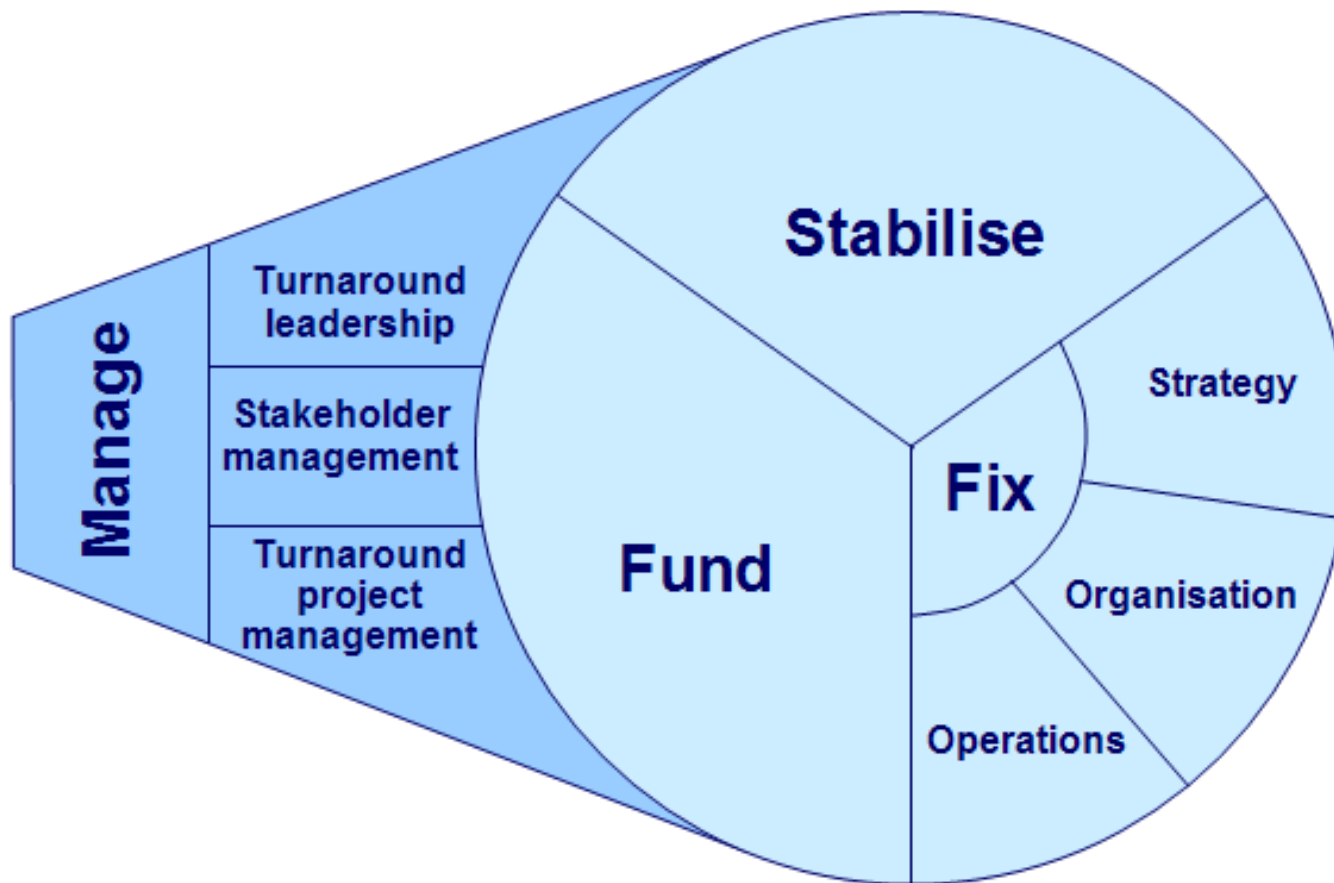




Turnover is Vanity
Profit is Sanity
BUT
Cash Flow
is Reality

Omdraai-strategie vir Landbou

Turnaround strategy definition



Aksie

Gevolge van die droogte



Figure 2

Sub-Saharan Africa's most populous cities







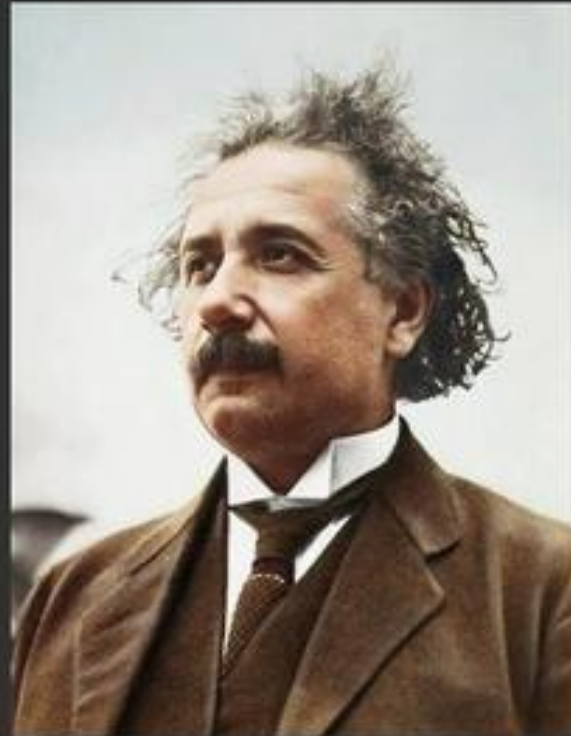




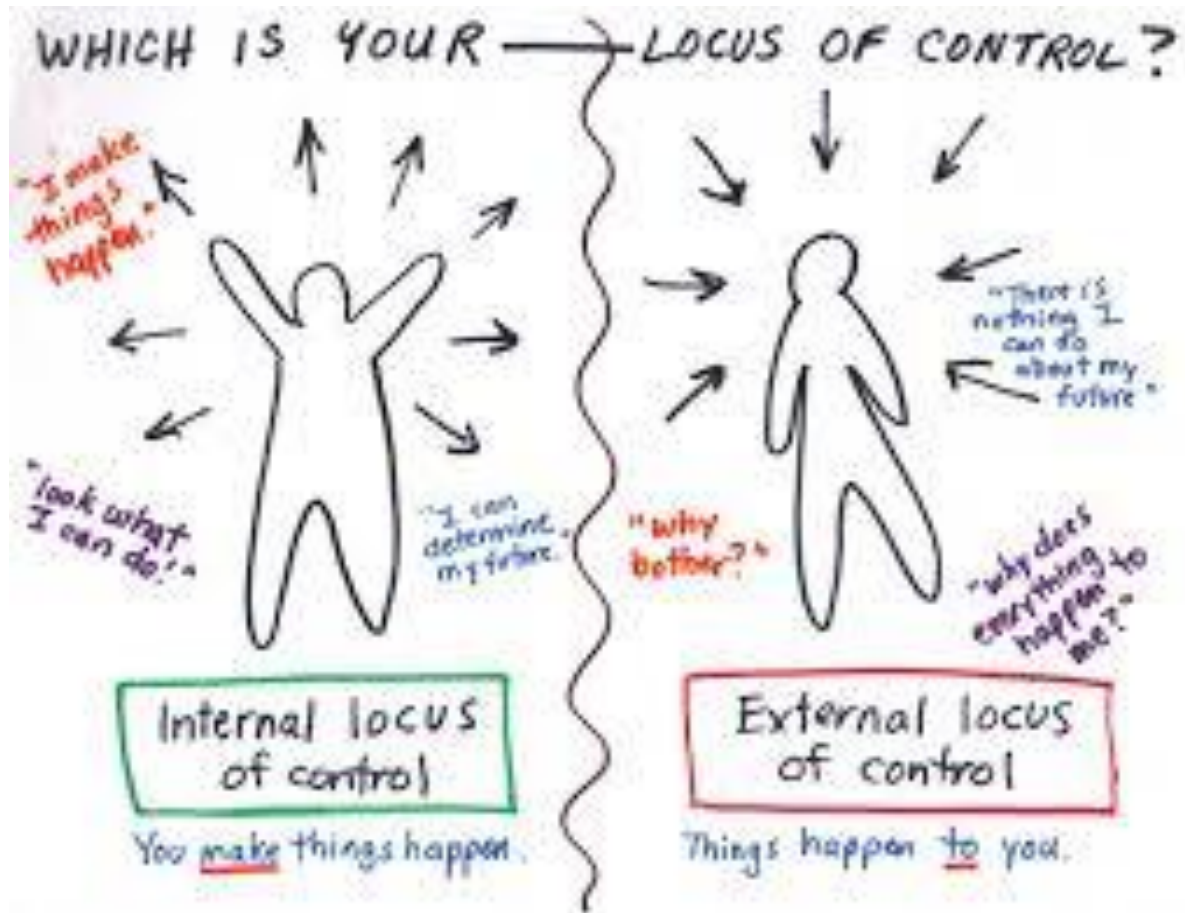
Wat nou ?

**“The world will
not be destroyed
by those who do
evil, but by those
who watch them
without doing
anything.”**

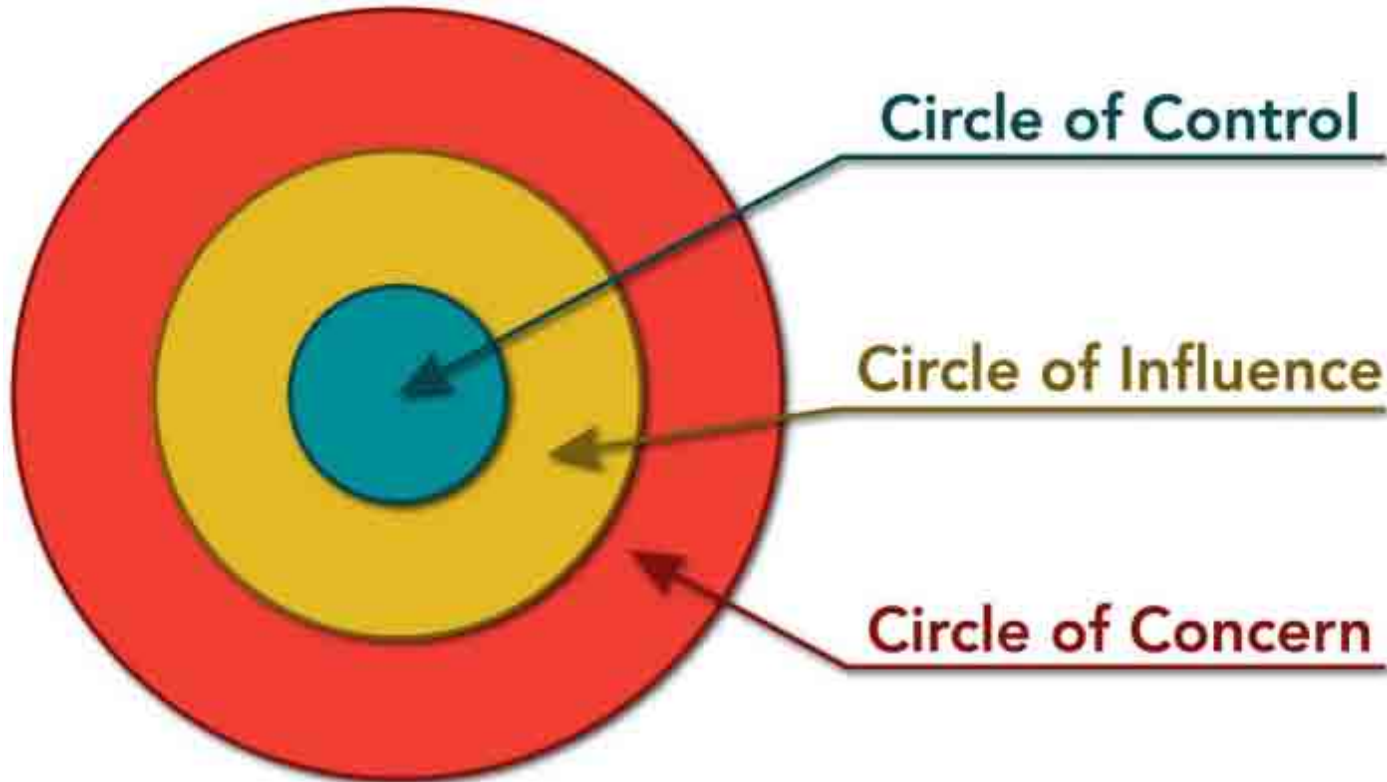
– Albert Einstein



Waar is die lokus van kontrole



Die sirkels



Ons handelsmerk

“Rebranding” van die sektor



Omdraai-strategie – oor wie gaan dit eintlik ?



Circle of control



When the rate of change outside exceeds the rate of change inside – then the end is in sight

Nuwe normaal

Visie: Eenheid oor Landbou / Broodmandjie vir Afrika

Gesindheid: Verdeeltheid / besigheid belyning

Inklusiewe groei – oneweredige verspreiding van rykdom, radikale militante organisasies

Konstruktiewe aktiviste

Die beste wees in terme van strategiese beplanning

Hoe lyk die speelveld 10 jaar van nou af – wat moet ek doen om n prysbepalende persoon te wees – nie prysnemer wees nie ----- Fokus

Transformeer besigheidsmodel # 1 in terme van innovasie / skeppende denke

1 continuous improvement - Kaizen

#1 learning organization

#1 Mensekapitaal verdien n disproporsionele belegging

#1 Tegnologie

#1 Sindikaat leierskap

Omdraai-strategie – elemente



Strategies



- Nasionaal
- Bedrywe
- Struktuur