



**the dplg**

Department:  
Provincial and Local Government  
**REPUBLIC OF SOUTH AFRICA**



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# **Alfred Nzo Nodal Economic Development Profile**

**Eastern Cape**

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# Section 1: Introduction

## 1.1 Purpose

This document is intended to serve as a succinct narrative report on the Alfred Nzo Nodal Economic Development Profile.<sup>1</sup> The profile report is structured to give digestible, user-friendly and easily readable information on the economic character of the Alfred Nzo Integrated Sustainable Rural Development (ISRDP) Node.

## 1.2 The Nodal Economic Profiling Project

In August 2005, in a meeting with the Urban and Rural Development (URD) Branch,<sup>2</sup> the minister of Local and Provincial Government raised the importance of the dplg programmes playing a crucial role in contributing to the new economic growth targets as set out in the Accelerated and Shared Growth Initiative of South Africa (ASGISA). He indicated that an economic development programme of action (PoA) for the urban and rural nodes needed to be developed.

In response, the URD branch developed *A Programme of Action for Building Productive and Sustainable Nodal Economies* in September 2005. The PoA is intended to stimulate economic growth and development in the poverty nodes. It is important to understand the economic potential of the nodes; to identify opportunities for public and private sector investment; to identify barriers and constraints to economic activity within the nodes; to acknowledge the recommendations on strategic interventions for improving the nodal business climate, and the institutional recommendations for implementation.

Three high-level deliverables form the core of the PoA, namely:

- (a) Nodal Economic Profiles (in which information such as demographics, institutional capacity, potential economic interventions, space economy, competitiveness profiles, and so on, is contained)
- (b) the Nodal Investment Atlas (a compendium of public and private sector investment opportunities)
- (c) the Nodal Economic Development Support Agency (recommendations and proposals).

In order to fund the PoA deliverables, various development partners were approached. The Business Trust believed in the credibility of this initiative, and funded it through the Community Investment Programme (CIP). Nonetheless, it needs to be pointed out that the Nodal Economic Profiling Project is a government-based project intended to raise the importance of productive and sustainable nodal economies.

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<sup>1</sup> Information is sourced from a detailed PowerPoint profile of Alfred Nzo.

<sup>2</sup> The Urban and Rural Development Branch is one of the deputy director-general divisions within the dplg.

## Section 2: An Overview of Alfred Nzo

### 2.1 Administration

Alfred Nzo is one of the district municipalities located in the Eastern Cape. It comprises two local municipalities, namely, Umzimvubu Local Municipality and Matatiele Local Municipality.

### 2.2 Spatial information

#### Local municipalities

In 1995, the Wild Coast District Council was established as a new municipality in an area that was part of the former Transkei homeland. Before 1995, all the services in the area were provided by the former Transkei homeland government and a legacy of severe service backlogs and high poverty levels remains. The Alfred Nzo District Municipality emerged from the Wild Coast District Council following the demarcation process in 2000. It retained only half of the area and population of the former municipality. In 2005, the district boundaries were redrawn and an exchange of local municipalities saw the Umzimkhulu Local Municipality removed from the Alfred Nzo District Municipality and added to KwaZulu Natal, while the Matatiele Local Municipality, formerly part of KwaZulu Natal, was amalgamated into the Alfred Nzo District Municipality.

#### Transport

- The N2 connects Mount Frere and Mount Ayliff to Mthatha, Kokstad and Durban.
- Major routes are in good repair, while smaller roads remain unsealed.
- The local population is mostly serviced by minibus taxis.

#### Terrain and natural resources

- The area consists mostly of mountainous terrain, particularly in the central and northern parts of the district. This makes service delivery and transport difficult and costly.
- Despite the mountainous terrain, there are large tracts of land with high potential for agricultural cropping, livestock production and new afforestation.
- There are several rivers in the municipality providing the potential for irrigation.

### 2.3 Socio-economic information

The socio-economic character of Alfred Nzo District Municipality is described below.

#### Population

- There are about 392 180 people living in the area which covers 7 870 km<sup>2</sup>. Approximately 91,1% of the population are rural and 8,9% are urban. The local municipality of Umzimvubu has a population of 197 551, while 194 628 people live in Matatiele. The population density is 49,8 persons/km<sup>2</sup>.
- Alfred Nzo faces serious backlogs in the provision of services (water, electricity, sanitation, health care, schools):

- o Only 22% of households have electricity, and just 26% have access to piped water within 200 m of their homesteads.
- o Most households (97,3%) live in formal brick houses.
- o There are 480 schools in the district, many of them built by local communities. The physical structures of the schools are in poor condition and schools are often located far away from settlements; children have to walk long distances each day to reach them. There is a shortage of qualified and dedicated teachers, and the pupil-to-teacher ratio is rising. The district has a literacy rate of just 55%.
- Approximately 69% of the population are younger than 29 years of age and this points to the need for youth development programmes when stimulating nodal development.
- Approximately 90% of the population live below the poverty line, earning less than R19 200 per annum. Only 13% of residents are employed.
- isiXhosa is the main language in the area. It is spoken by 79% of the population.
- Females make up 55% of the population and comprise 59% of heads of households.
- Forty-four per cent of households consist of four to seven people, and 45% of households consist of one to three people.
- About 78% of households in Alfred Nzo live below the Household Subsistence Level (HSL).

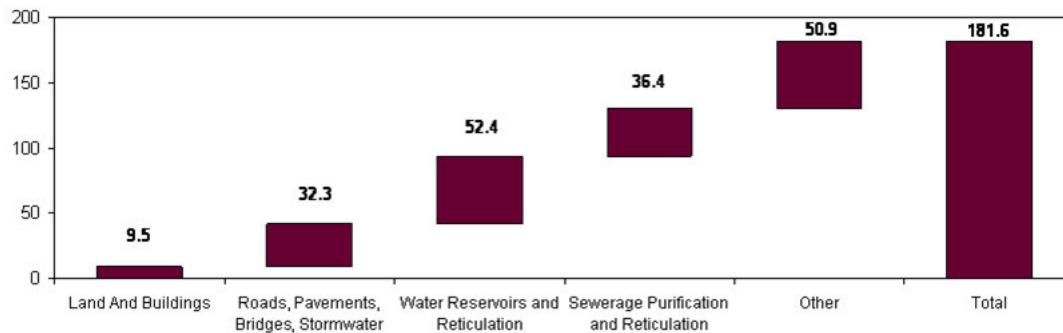
### **Education**

- Approximately 23% of residents do not have any education and the remaining 77% have some form of education.
- Only 12% of the adult population have completed secondary school.
- No residents in Alfred Nzo have received a tertiary education.

### **Health care**

- There are 33 clinics and two hospitals in Alfred Nzo.
- The per capita health expenditure is R75 per annum and the number of patients seen per nurse per day is 21.
- There is strong prevalence of HIV and AIDS in the node, with 27% of the population infected.
- There is a health centre in Maluti that is currently being extended and renovated.

## 2.4 Capital expenditure



**Figure 2.4.1: Capital expenditure: 2004-2005**

During the period 2004-2005, an amount of R52,4 million was spent on water-related services; R32,3 million on roads and storm water drainage; and R36,4 million on sewerage purification and reticulation services.

## 2.5 Key remarks about Alfred Nzo

- The Alfred Nzo District Municipality is situated in the north-eastern corner of the Eastern Cape and comprises two local municipalities:
  - o Umzimvubu, in the south, comprises the towns of Mount Ayliff (the political centre of the district) and Mount Frere (a small retail and banking hub).
  - o Matatiele, a town in the northern end of the district, was formerly part of KwaZulu Natal and was amalgamated into Alfred Nzo in 2005.
- Alfred Nzo District Municipality is the most impoverished area in the province, and one of the most underdeveloped of all the poverty nodes.
- Though the situation has improved steadily during recent years, the area continues to face massive backlogs, most notably in water, electricity, infrastructure and service delivery.
- Economic activity remains extremely low, with 2001 census estimates placing employment levels at just 13% of the total population. A total of 66% of the population are classified as “not economically active”, which is largely due to a very young age distribution – about 43% of the population are younger than 15 years of age.
- Despite the significant challenges it faces, Alfred Nzo is endowed with a number of resources that hold great potential for long-term economic growth, including an abundance of land, exceptional soil quality and good climatic conditions.
- As a result, significant opportunities for growth and employment exist in the agricultural, forestry and eco-tourism sectors, provided the area’s latent potential can be unlocked.

Key LED projects identified in the IDP are as follows:

Project description	Total cost	Status
Umzimvubu Goat Project: Identification of goat breeders, capacity building of breeders, construction of perimeter fence, access road, reservoir, feedlot, meat processing plant, leather tannery, dairy, craft centre and administration block	R5,76 million	In progress
Fruit production: Infrastructure development and establishment of orchards, capacity building of producers, establishment of packing shed	R8 million	In progress
Maluti hiking trails: Capacity building of beneficiaries, mapping and marketing of trail, institutional arrangements	R4 million	Partly operational
Msukeni Development Enterprises: Land acquisition, fencing, mobilisation and social facilitation, infrastructure development, capacity building of beneficiaries	R5 million	In progress
Vegetable production: Phased infrastructure development, capacity building of crop producers	R18 million	Implemented on 14 sites
Cut flower production: Development of cut flower production for export to European markets	R5,2 million	In progress
Dairy cattle farming: Acquisition, fencing and development of pastures, livestock improvement	R8 million	In progress
Grain production: Technical and business training, land preparation, establishment of community production centre including milling plants	R14 million	In progress

## **Section 3: The Economy of Alfred Nzo**

Alfred Nzo is the poorest area in the Eastern Cape and is among the most underdeveloped areas in South Africa. Ninety per cent of households earn less than the household subsistence level, and the situation seems to be worsening. The district economy is characterised by limited formal economic activity and high dependency on the public sector for employment and social grants. Low income levels can be explained by extremely low employment levels; only 13% of the population are employed, while a startling 66% are economically inactive. The public sector is by far the most significant source of employment for those who have been able to find work. The district has not shared in the Eastern Cape's economic growth, and the GDP of Alfred Nzo has increased only minimally over the past decade. Although the agriculture/forestry sector accounts for only a small share of employment and GDP, Alfred Nzo's economic potential lies in this sector, and to some extent, in the tourism sector.

### **3.1 Location of economic activity**

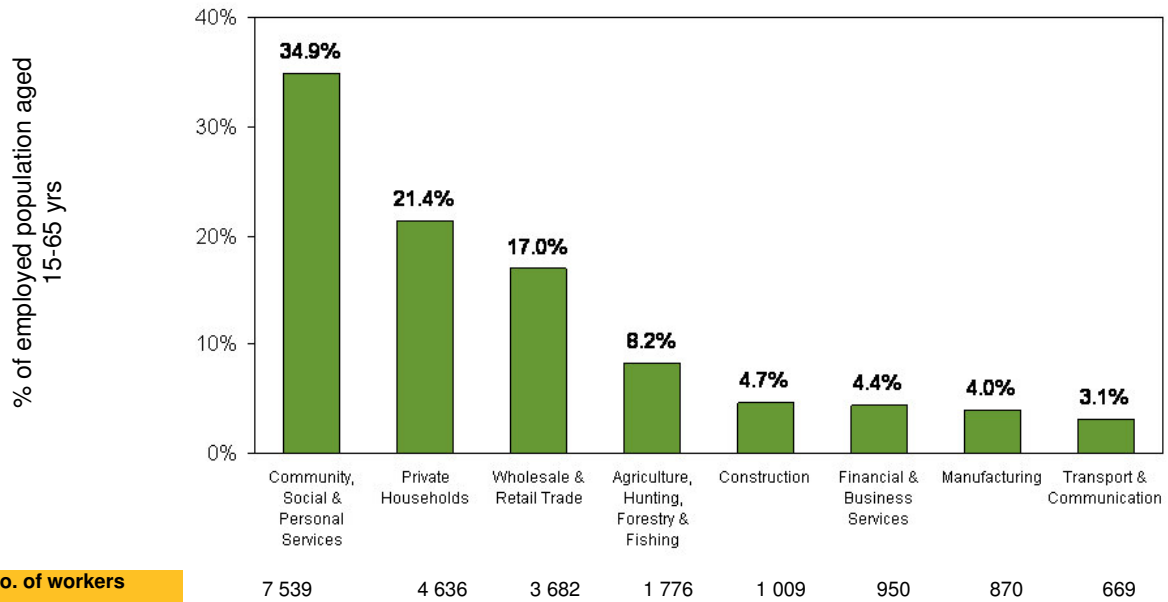
Economic activity is concentrated predominantly in the towns of Mount Frere, Mount Ayliff and Matatiele, which serve as commercial hubs for the surrounding villages. Kokstad, however, is a large retail, service, industrial and transport hub. Areas of economic activity include:

- Retail/services: The towns of Mount Frere, Mount Ayliff and Matatiele contain national chains (Boxer, KFC, etc.) as well as numerous informal SMMEs (spaza shops, taverns, fruit and vegetable stands, salons, etc.). However, most consumer spending leaks to nearby Kokstad in KwaZulu Natal.
- Construction: Similar to other nodes, the construction sector is characterised by dependency on government tenders and temporary employment creation.
- Agriculture: Most households engage in some form of subsistence farming, while commercial farming remains very limited.
- Forestry: There are a number of privately owned timber plantations in the area and a sawmill is located in Mount Ayliff.

### **3.2 Sectoral contribution to employment**

The community, social and personal services sector includes civil servants such as government employees, as well as teachers, doctors, etc. This sector is by far the most significant source of employment, employing 34,9% of the employed population. Mining and electricity provide less than 2% of the employment in the municipality and is not shown on the table below. Agriculture, which is seen as a potential growth area, currently employs only 8,2% of the population. The following graph (sourced from Stats SA Census 2001) illustrates the contribution by the various sectors in the Alfred Nzo District Municipality area.





**Figure 3.2.1: Employment by major sector: 2001**

### 3.3 Sectoral prioritisation

An analysis of the contribution of the various sectors to the local economy and to local employment shows that the five priority sectors are as set out in the table below.

Priority sector	Growth potential
General government services	The public sector dominates the Alfred Nzo economy, both in terms of GDP and employment. However, the node has a very low tax base, and public sector expansion will not be sustainable unless other industries are developed to generate wealth in the area.
Wholesale and retail trade, catering and accommodation	There is a small retail sector in the node, and initiatives like urban renewal and business support services could help to grow the sector. However, retail growth is ultimately dependent on consumer purchasing power and, therefore, the sector is dependent on the population generating wealth through other industries. The development of eco- and cultural tourism could create some employment for the area and bring in much needed spending.
Community, social and other personal services	This is essentially a government-funded sector (e.g. teachers, health care workers, police, etc.), and therefore, the same assessment as for general government services applies here.
Finance and business services	There are a few banks in the area, but aside from small-scale retail banking, there are no sizable private companies or wealthy individuals to help to build a financial or business services sector.
Manufacturing	There is essentially no existing manufacturing base to build on and the node is not strategically positioned with respect to key markets or transportation corridors.

Since the economy is almost entirely sustained by the public sector, little opportunity is presented by looking at the existing sectoral contribution to GDP.

## **Section 4: Selected Sectors**

Although the current contribution of agriculture and forestry to the Alfred Nzo economy is limited, these sectors (and to some extent, tourism) present the greatest opportunities for the area. The challenge for Alfred Nzo is to unlock the economic and employment potential of these key sectors, which are currently seeing minimal or declining growth.

### **4.1 Agriculture (crops and livestock)**

Land is available for agricultural production in the Alfred Nzo Municipality. In addition, soil quality and climatic conditions have the potential for high yields. The Umzimvubu River system, which traverses the district, provides strong irrigation potential. Currently, only limited use is made of quality seeds, fertilisers, pesticides and farming machinery due to high costs.

Farmers in the area produce crops and livestock almost entirely for subsistence, barter or traditional purposes. There is very little commercial farming in the district. Crops consist mainly of maize and other grains. Goats, cattle and sheep are kept. Meat and produce are generally sold to local markets (Mount Frere, Mount Ayliff, Matatiele, etc.). Pine and gum trees are grown to a limited extent, with the timber extracted and processed by Singisi. Although there is very little export outside the node, there is potential to produce a range of high margin vegetable and fruit crops and commercial livestock.

The sector's potential can be reached by encouraging growth in the commercial sector through diversification into high demand, high margin products coupled with the establishment of local agri-processing industries; and developing subsistence and emerging farmers into larger-scale producers for commercial markets. Additional value can be extracted through the development of downstream processing industries.

### **4.2 Agriculture (forestry)**

The Eastern Cape has been identified as one of the only remaining areas in South Africa that is available for new afforestation. Furthermore, demand for timber products is strong in South Africa and abroad. Alfred Nzo already has some category A forests under management, and has the potential for new large-scale afforestation of pine, gum and wattle trees. The components of a forestry cluster are already emerging, with a new billion-rand timber-processing plant being developed in Kokstad.

### **4.3 Tourism**

Tourism activity in the area is currently very limited, which can mostly be attributed to a lack of awareness of the area and its attractions. There are also few accommodation options. However, the area is rich in natural attractions that position it well for eco-tourism.

The area boasts scenic mountain terrain (Drakensberg mountains), rivers and wetlands for bird viewing, and could offer tourists a variety of outdoor activities, including hiking, horse riding, bird watching and freshwater fishing. There are several municipality-funded community tourism projects, namely:

- Mehlooding Trail
- Masakala Guesthouse
- Umzimvubu goat project
- Cut flower project.

Currently the district attracts mostly domestic business travellers who happen to be passing through or working in the area. Only a few international tourists are drawn to the cultural attractions and scenery due to lack of marketing.

The district has not developed a tourism strategy nor has it marketed the area, despite several recommendations to do so. Furthermore, there is little to no co-ordination of efforts between tourism role-players within the area, with other districts in the province, or with the Eastern Cape Tourism Board. Would-be accommodation owners are deterred by poor infrastructure in the area, including unsuitable roads and difficulty with access to water and electricity.

Several steps need to be taken in order to alleviate these constraints. The most important action is the development of an integrated marketing strategy that identifies the right target markets/segments for the area, develops appropriate messaging and identifies channels for effectively reaching these segments.

# Section 5: Economic Growth and Investment Opportunities

## 5.1 Introduction

The Alfred Nzo District Municipality has identified agriculture and tourism as areas of economic growth and investment opportunities. The following potential growth opportunities exist.

## 5.2 Agriculture

### **Development of fruit growing**

A fruit growing industry coupled with processing industries (e.g. juicing and canning, etc) will be established. The area is ideal for growing deciduous fruit (peaches, apples). A partnership with private investors to develop a processing plant in the area is essential. Potential partners could include Cape Span or Ceres. Revenue would be generated from the sale of fruit to local and potential national markets, and to a processing company. An income from the sale of other products such as jam and dried fruit could also be earned. Farming, picking and packing could provide job opportunities in the area. The fruit-processing factory would employ numerous people including unskilled labourers and more experienced staff.

However, farmers in the area are not experienced in fruit growing and would need mentorship. They would require access to inputs such as seeds, fertiliser and mechanical equipment. Orchards are already in existence near Matatiele, which could be used as an anchor project from which the sector can be grown.

### **Commercial maize growing**

Commercial maize growing provides an opportunity for the area. There is demand for large-scale production of maize for local consumption and sale to the national market. This could be coupled with value-adding processing activities such as milling and baking. The “Massive Growth” project is an initiative supported by the district that will see large volumes of maize sold to Sasko Milling and could be used as a basis for the development of maize growing. The revenue would be generated from maize sales to buyers such as Sasko. Milled maize products such as mealie meal could be sold to retail outlets. If the crops are stored in a silo, the maize could be held until the winter months when maize is scarcer and prices higher.

However, technical expertise is required to grow commercial grade crops. Farmers and farm hands would be required to plant and harvest the maize, and sales managers and marketing personnel are essential when distributing the crop. Knowledge, training and mentorship would need to be provided. There is a need for access to inputs such as seeds, fertiliser and mechanical equipment. Improved infrastructure, particularly transport and storage facilities (i.e. grain silos), is required.

### **Cultivation of cut flowers**

The cultivation of cut flowers (mainly proteas) for export to international markets, particularly the Netherlands and Scandinavia, provides an economic opportunity for the area. The scale of the existing Goxe Cut Flower anchor project would need to be increased – however, it would be necessary to partner with reliable overseas buyers. Flowers would be grown in the “protea belt” region of Alfred Nzo and harvested, packaged and transported in cold storage units to Durban airport. They would be flown to foreign markets and sold to importers. Labour would be needed to enable the logistics chain to function. Farm labourers would be employed to plant and harvest the flowers and other employees would be required to package, transport, market and sell the produce.

Cut flower growing has so far created 220 part-time and 24 permanent jobs. Should the scale increase, more job opportunities would be provided. The development of a logistics network, namely transport and storage facilities including timely shipments and freight flights, would be required. It would be necessary to adopt global practices in harvesting and post-harvest processing.

### **Growth of canola for biofuel production**

Growing canola for biofuel production provides an opportunity in the area. A subsidiary of the German group Thyssenkrupp Engineering, has expressed interest in the area as a source of canola. Globally, biofuel is becoming a popular fuel source due to growing energy demand, finite fossil fuel reserves and the desire for greater fuel security. This could potentially involve building a processing plant in the Alfred Nzo area. The fuel producer would buy crops from district farmers; this would provide a reliable market for the canola farmers and would be a stable source of income. The project requires knowledgeable farmers, however. Farm hands would be required to plant and harvest the crops. There is a need for access to inputs such as seeds, fertiliser and mechanical farming equipment. Transport and storage facilities are essential. This opportunity would most likely work best as a partnership where the fuel producer helps with start-up costs and training.

### **Commercial dairy farming**

An opportunity for commercial dairy farming has been identified. The breeding of livestock and production of dairy products like milk and cheese is a growth opportunity for the area. This operation would earn revenue from the sale of dairy products to grocery chains and would ideally be a supplier to an established dairy company with national reach. This would create several jobs in both the livestock raising and processing operation, but requires a wide array of technical and managerial skills not currently available in the area. As there is no existing dairy infrastructure in the area at present, a dairy would have to be built. The initiative would need to find a suitable investor or partner such as DairyBelle or Clover who could fund the start-up costs and provide managers and skilled workers.

### **Expand the Umzimvubu goat project**

Private partners/investors in the Umzimvubu goat project are required to increase the current operation. The project would export meat products to the Middle East and sell the products to national retailers. Leather products could be sold to home furnishing stores. The current operation involves approximately 1 000 local farmers and has created 55 permanent jobs. At present, there is a manager and a marketing director. Expanding the project would require access to high quality goat stock and cold storage transport equipment.

## **5.3 Tourism**

### **Establishment of luxury lodge or timeshare development**

The establishment of a luxury lodge or timeshare development in a secluded and scenic location is required for the area. The facility could provide a high quality service for wealthy solitude seekers. It would offer eco-tourism activities such as hiking, bird watching, fishing and horse riding. The facility could co-operate with managers of other attractions (such as white water rafting/trout fishing) and offer guest package deals. Revenues would be generated from accommodation fees, food, activities, etc. Potentially there could be the sale of some units as freehold cottages or timeshare units. Approximately 150 people would be employed during the construction phase. Approximately 30 permanent employees would be required throughout the year to maintain and operate the hotel (managers, cleaners, restaurant staff, etc.). Water, electricity, waste removal and sanitation are essential for any hotel. Effective marketing through a tourism bureau, tour operators, travel magazines, Internet websites and other forms of media will increase awareness of the area. Market research needs to be conducted around the demand for such a facility in the area and to pinpoint an appropriate location. The project will require a minimum investment of R30 to R40 million and will ideally attract an established wilderness lodge or hotel management group.

### **Establishment of a spa at Tshisa Hot Springs**

The establishment of a spa at Tshisa Hot Springs should attract tourists to the area. It would entail the construction of indoor and outdoor pools or bathing areas filled with mineral-rich water from the springs. Provision would be made for a health centre on the premises (for massages and other treatments). Chalets, a hotel or a lodge in the area to host visitors and an on-site restaurant would need to be built. Domestic and international tourists would pay to visit the spa and stay in the on-site accommodation. Current trends towards health consciousness should increase demand for such a facility. The planned location of the spa lies on the road to the Tiffindell Ski Resort, so there is potential to receive high volumes of tourist traffic. Building the spa would provide opportunities for construction workers, and later hotel and restaurant staff, and beauty therapists, would be needed. Other potential job opportunities exist for people to run the spa and maintain the pools. Currently there are no structures at the site. Access to the hot springs would need to be improved by constructing tarred roads for transport around the area. Effective marketing through tour operators, travel magazines and other forms of media will increase awareness of the area and the spa itself. Market research needs to be conducted around the demand for such a facility in the area as this may require initial funding from the municipality. Ideally, it would be built by private sector investors.

## Section 6: Summary

As part of the former Transkei homeland, Alfred Nzo inherited massive service backlogs and is one of the most impoverished areas in the country. Other challenges it faces include a low skills base, limited employment opportunities, and a high incidence of HIV and AIDS. The node is sparsely populated over mountainous terrain, and its greatest asset is the widespread availability of land. Alfred Nzo's economy is characterised by limited formal economic activity and high dependency on the public sector for employment and social grants. Although activity is currently limited in these sectors, agriculture, forestry and tourism hold the most potential for future growth. Alfred Nzo is well positioned to produce maize, cash crop vegetables like cabbage and potatoes, fruit (particularly peaches and apples), livestock and timber. The key barriers to agricultural opportunities include a severe deficiency in knowledge and skills, a lack of capital and inputs, and poor market access. With several natural attractions, including scenic beauty, mountains, hiking trails, wetlands and fishing, Alfred Nzo has the potential to develop a vibrant eco-tourism industry. However, it currently sees few tourists, and the sector is hampered by the absence of marketing efforts, lack of co-ordination between industry players, and inadequate accommodation options.

The following potential sources for economic growth have been identified:

Short term	Long term
<ul style="list-style-type: none"> <li>• Focus on achieving food security and becoming self-sufficient in those products the area can produce</li> <li>• Satisfy local market demand so cost of living is cheaper and spend is retained in the area</li> <li>• Improve agricultural skills as the key to unlocking the sector</li> <li>• Develop technical and management skills</li> <li>• The most effective approach would be to provide training in combination with mentorship from experienced farmers</li> <li>• In order to realise the potential of their land, farmers need access to capital and assistance acquiring inputs</li> <li>• Transport and storage infrastructure are critical to bringing products to market</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on producing surplus agricultural products for export in order to bring funds into the node</li> <li>• Durban and Pietermaritzburg are the logical markets to target</li> <li>• Agri-processing industries could be developed with existing corporations to produce products for the national market (e.g. milled grain, juice, etc.)</li> <li>• Develop education for transforming this node over the long term</li> <li>• Develop markets and secure partnerships with agricultural buyers</li> <li>• Value-adding and secondary industries will allow the node to extract more income and employment opportunities from its primary products</li> </ul>

The current activities of the district municipality are as follows:

- Infrastructure provision and service delivery (electricity, water, etc.) continues to happen, albeit at a slow pace.
- The agriculture, forestry and tourism sectors have been identified as key economic growth drivers.
- Several anchor projects have been launched in each of these sectors, including goat farming and processing, commercial maize production and hiking trail development.

- Consultants have been engaged to create LED strategies at district and municipal levels, as well as very high-level strategies for the agriculture and forestry sector.
- The private sector is being targeted to develop partnerships in identified key sectors.

The focus, however, should be on the following activities:

- Focus on attracting major investments (commercial farmers, food processors, etc.).
- Make a massive effort to up-skill farmers and employ a mentorship model.
- Market the area for tourism.

The involvement of the following key stakeholders is needed to effectively grow the economy of the Alfred Nzo District Municipality:

- local government (district and municipal)
- Department of Agriculture, Department of Water and Forestry, Department of Trade and Industry
- provincial bodies: ECDC, ECTB
- community leaders/traditional authorities
- local people
- private sector: potential producers and/or buyers.