



Vulnerability Assessment: Agriculture

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Structure & Ownership

- 93% of land area is agricultural land, but only 11% arable
- Geography: From arid Karoo to Mediterranean west and subtropical east, enabling diverse production
- Branches: Horticulture, livestock, field crops
- Divided between a **globally competitive agro-industry** and **marginalised smallholders and low-paid immobile farm labour**.

Employment and Climate Risks

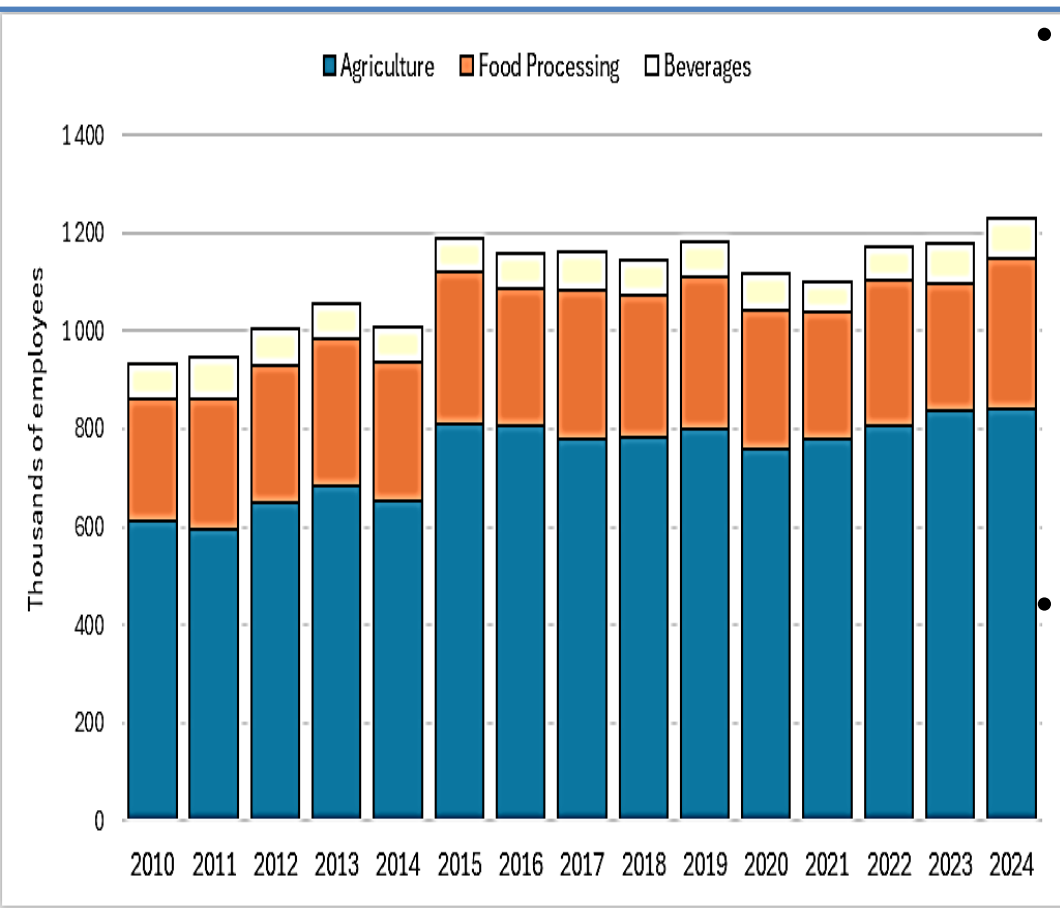
- **Employment:** Horticulture is the largest employer (40%), with widespread seasonal labour.
 - Livestock employs fewest, but generates ~40% of industry income
- **Climate Shocks:** Sector contracted 12% in 2023; summer grain & oilseed harvest down 23% (2023/24)
- **Adaptation Gap:** Commercial farmers can invest in tech; smallholders in KZN and Limpopo are highly vulnerable.

Employment in Agriculture

- **Employment:** Around **840,000** people employed in industrial agriculture (2024).

- **Key Characteristics:**

- **Concentrated in Western Cape:** ~300,000 jobs.
- **Significant in Labour-Sending Areas:** Limpopo (>160,000) and KZN (~150,000).
- **Demographics:** Majority African, followed by Coloured. Over 60% male.
- **Widespread seasonal & temporary work.**
 - **40%** of farmworkers are permanently employed; **30%** are temporary.

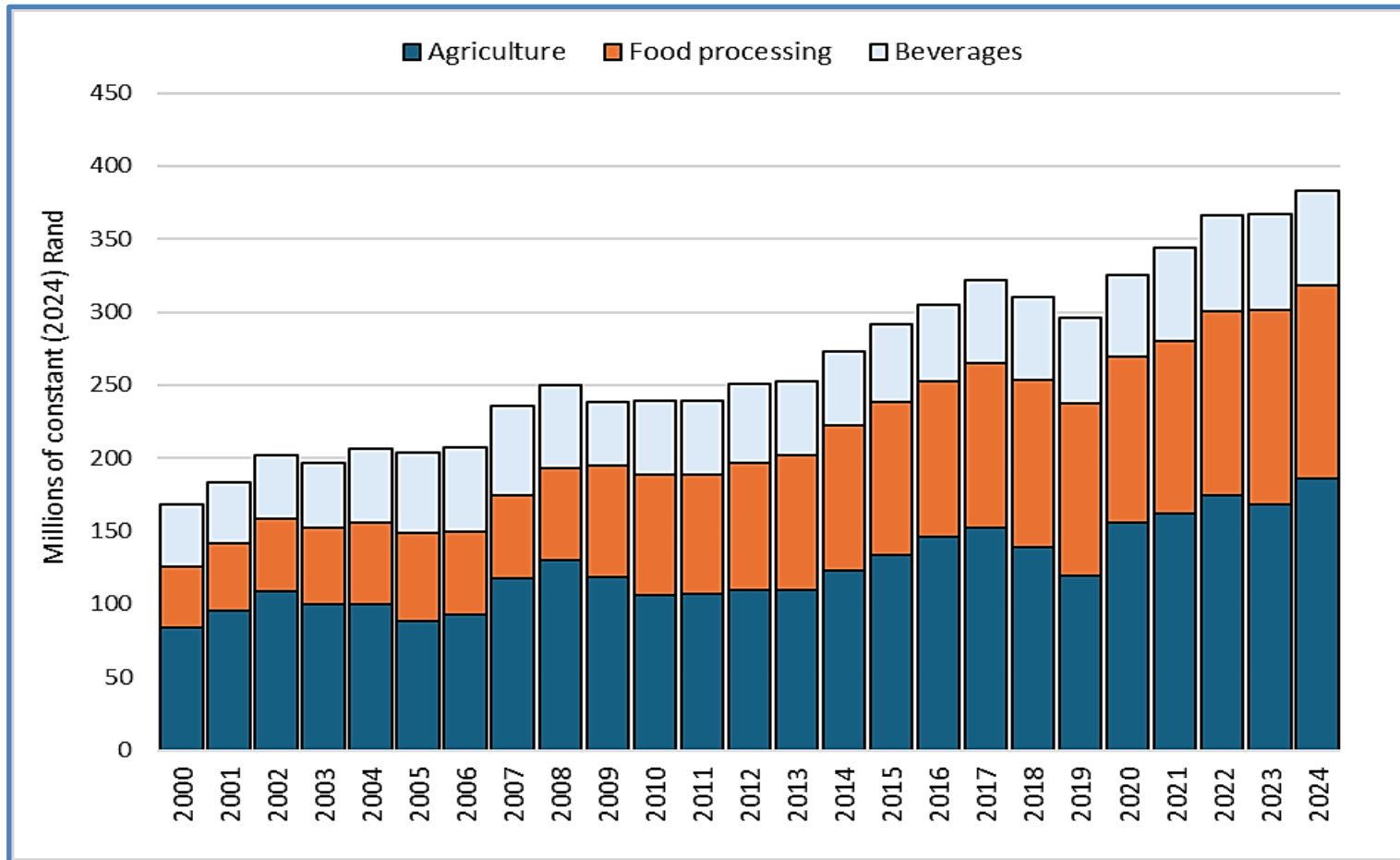


Source: Calculated from Statistics South Africa. Labour Market Dynamics, 2024.

Electronic database. Series on economic activities. Database downloaded from ISiBalo

Data facility at www.statssa.gov.za in August 2025. Note: Respondents could give more than one answer.

Trends in Production

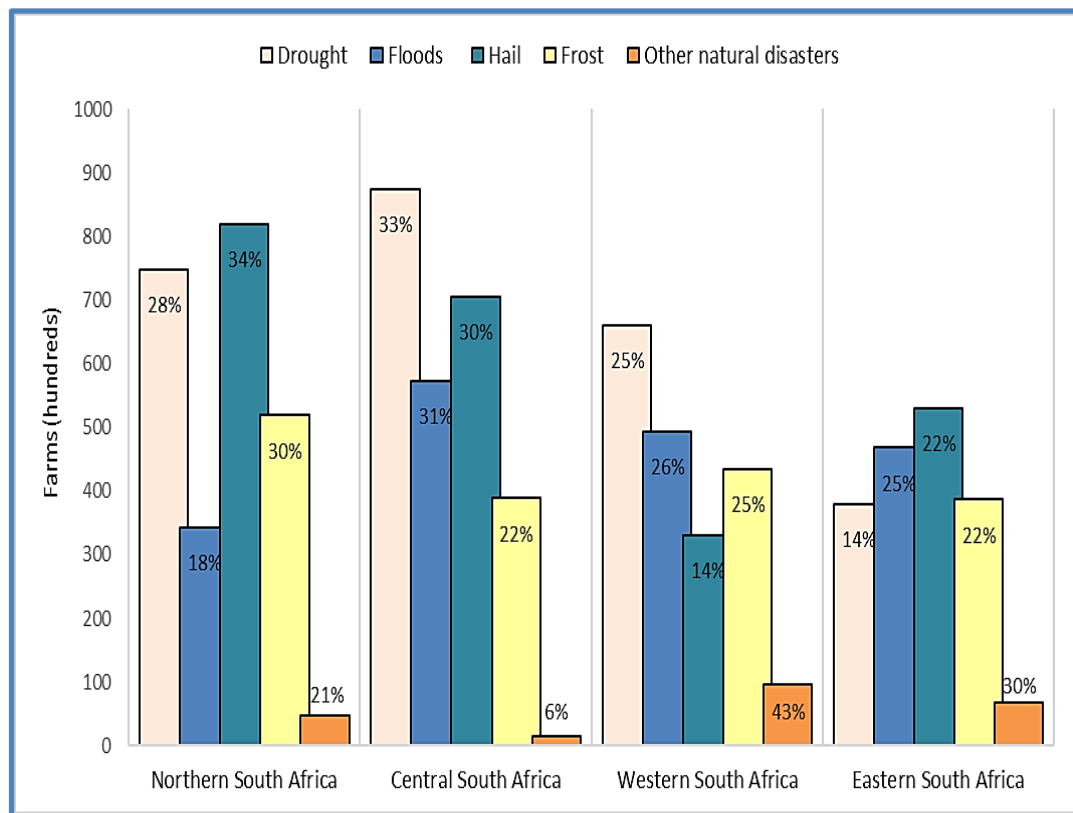


- Agriculture's GVA grew significantly (R83m to R185m from 2000-2024).
- **Geographic Concentration:** Production is concentrated in the Western Cape and KZN.
- **Processing Concentration:** Food processing is centred in Gauteng, a legacy of apartheid-era policies.

Dimensions of Climate Change-impacts

- **Direct Pressure:** Drought is the top threat, but floods are rising.
- **Subsector Impacts:**
 - **Horticulture:** Sensitive to temperature/water shifts; winter chill under threat.
 - **Field Crops:** Recurring droughts reduce yields; irrigation demand strains water.
 - **Livestock:** Heat stress, disease, and degraded pastures.
- **Regional risk:** Western Cape coast, Northern Cape, parts of Eastern Cape, North West, Limpopo highest risk by 2050

Number of farms by geographic location and type of loss, 2023



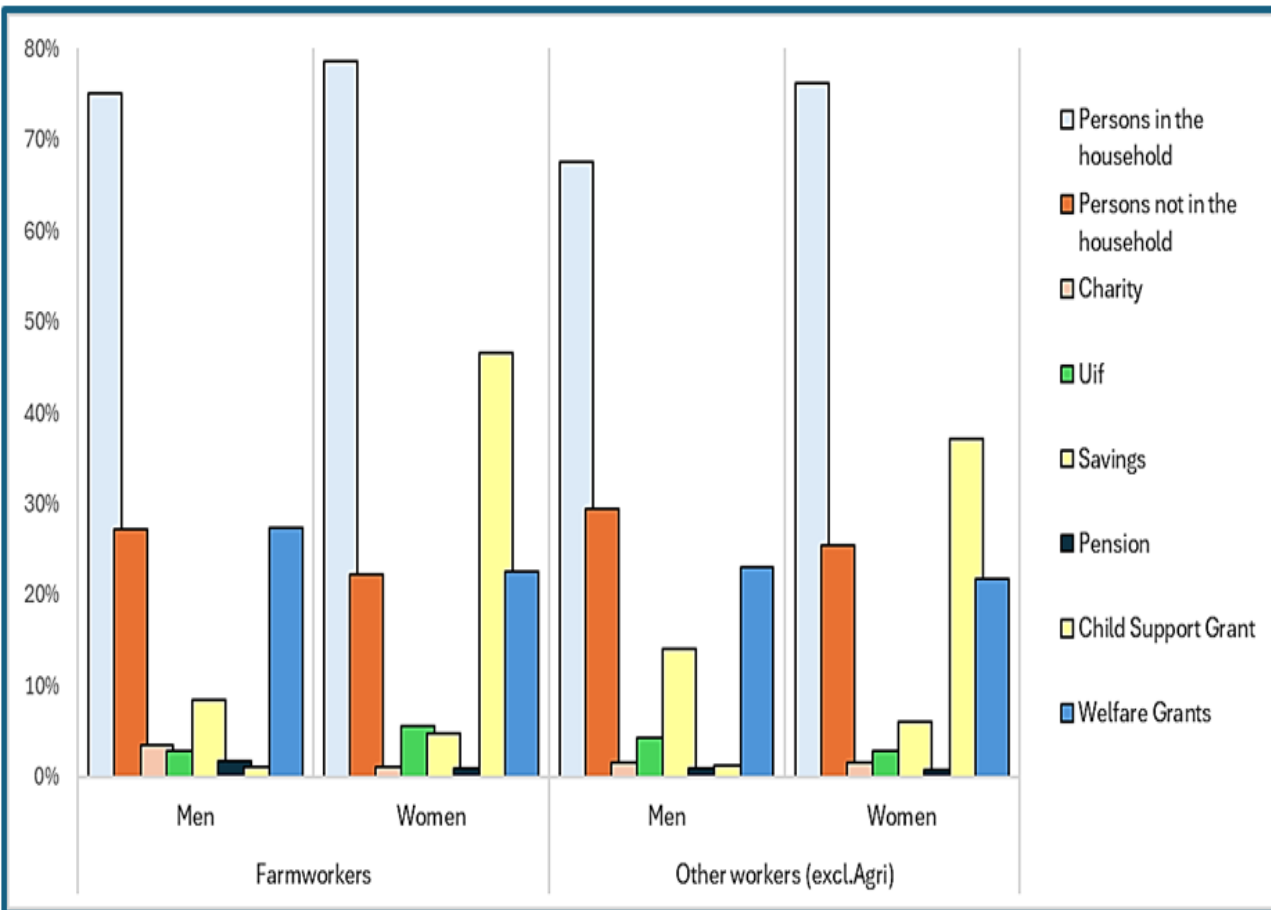
Source: Agricultural industry: Financial and production statistics, 2023. Downloaded at www.statssa.gov.za in July 2025. Note: Northern South Africa (North West, Mpumalanga, Limpopo), Central South Africa (Free State, Gauteng), Western South Africa (Western Cape, Northern Cape), Eastern South Africa (Eastern Cape, KwaZulu-Natal)

Vulnerable Groups

- Three primary vulnerable groups:
 - **Farmworkers:** At risk of job loss and homelessness.
 - **Households in Historic Labour-Sending Regions:** At risk of hunger from crop failure.
 - **Farming communities**

Farmworker vulnerability

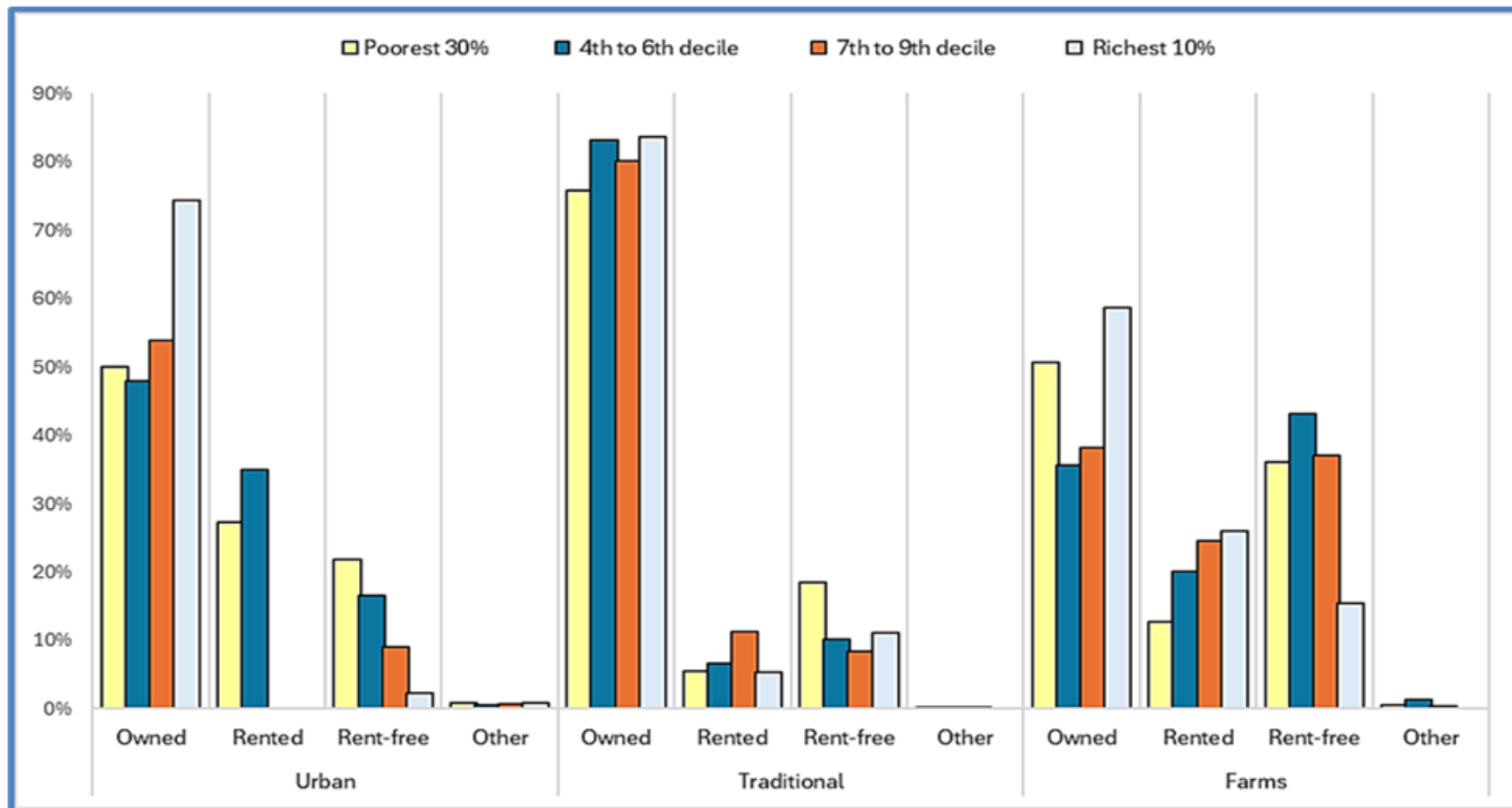
Sources of support mentioned by jobless farm and other workers, by gender, 2024.



- **Financial:** Low wages (Median: R3,400 men R2,600 women); jobless rely on family (70%) and grants.
- **Physical:** Housing tied to employment; job loss = risk of immediate homelessness.

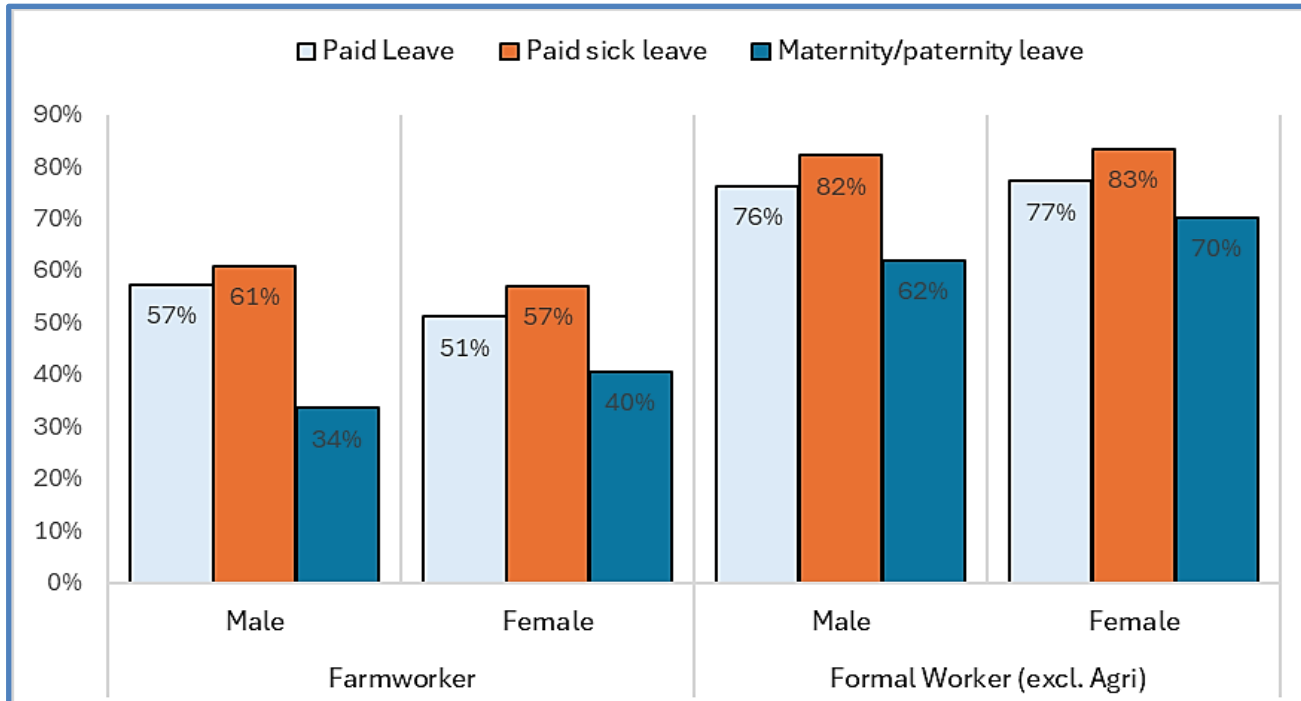
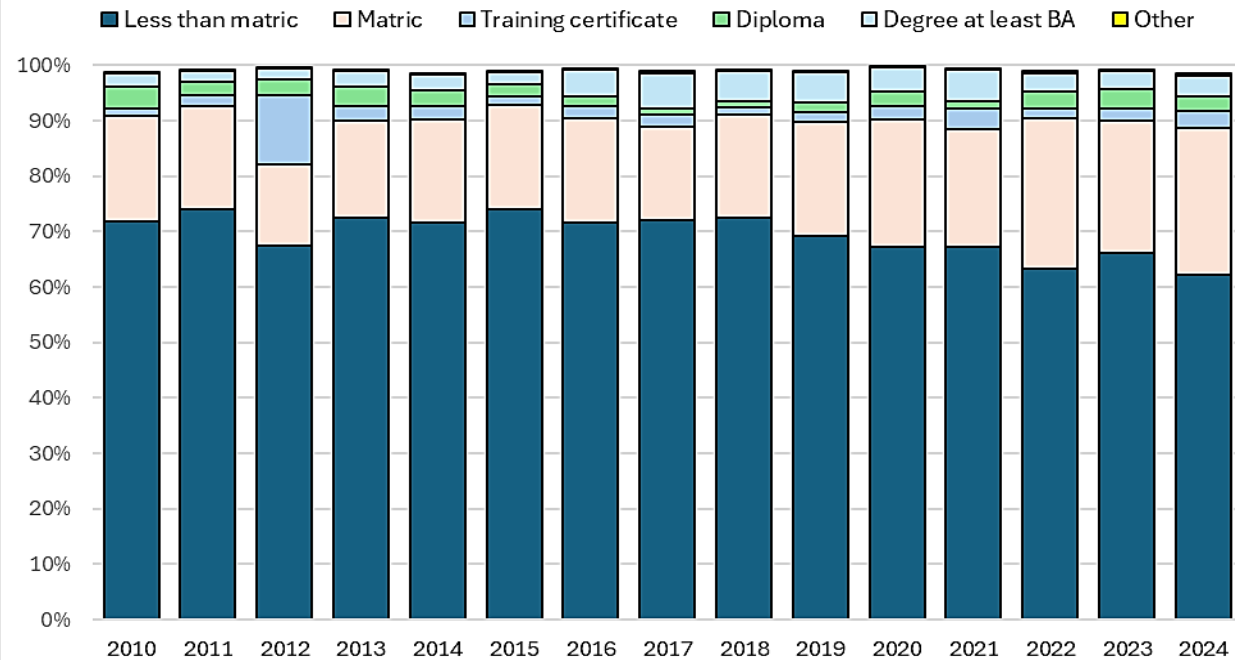
Source: Calculated from Statistics South Africa. Labour Market Dynamics, 2024. Electronic database. Series on economic activities. Database downloaded from ISiBalo Data facility at www.statssa.gov.za in August 2025. Note: Respondents could give more than one answer.

Basis for home occupancy in farmworker and urban households, 2024 (a)



Source: Calculated from Statistics South Africa. General Household Survey, 2024. Electronic database. Series on agricultural activities and household income. Database downloaded from ISiBalo Data facility at www.statssa.gov.za in August 2025. (a) Note: Households on farms are used as an approximation to farmworker households

- **Human:** 62% have less than matric; 75% in elementary jobs with uncertified skills.
- **Social:** Only 6% are unionised; temporary contracts are common; limited access to paid leave.

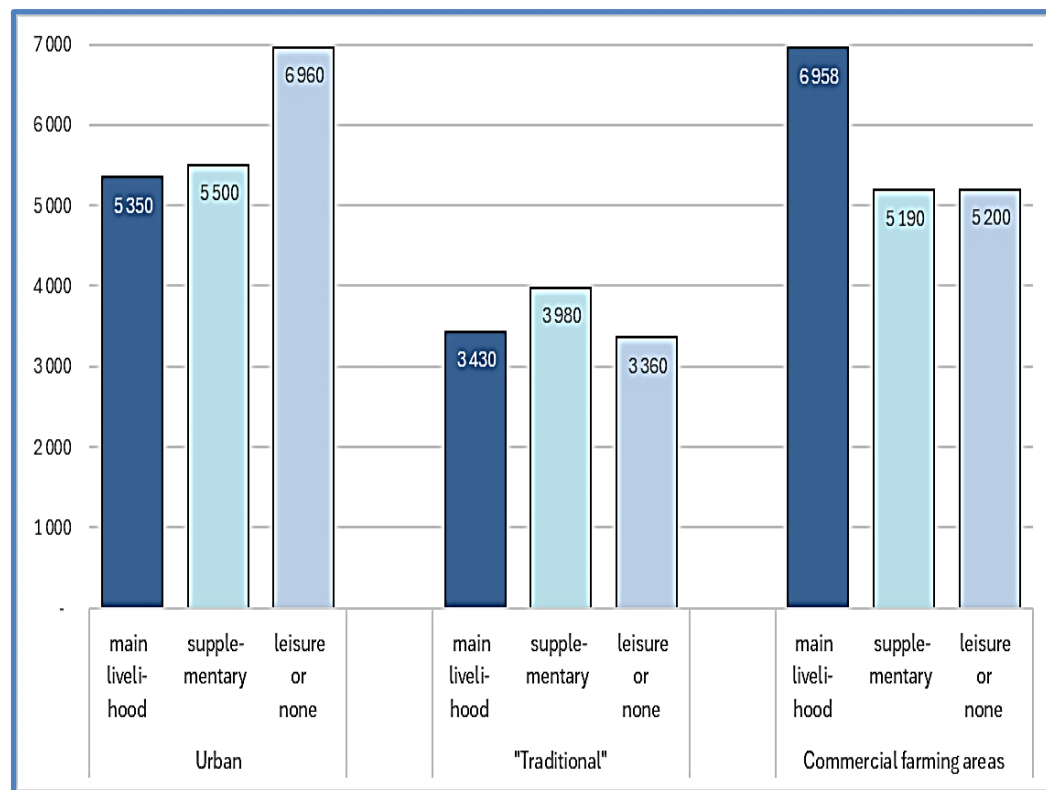


Source: Calculated from Statistics South Africa. Labour Market Dynamics, 2023. Electronic database. Database downloaded from ISibalo Data facility at www.statssa.gov.za in August 2025

Vulnerable groups: Historic labour-sending regions

- **Not Commercial Farmers:** This is primarily small-scale (household) food gardening for supplementary food.
- **Financial Capital:** Limited savings and access to credit/financial services
- **High Food Insecurity:** 23% of these households experience food insufficiency.
- **Key Constraints:** Low incomes, grant dependency, lack of irrigation, and land degradation.
 - Smallholders and emerging farmers resource-poor; restrict adoption of new farming technologies
 - Gardeners have even fewer resources due to high unemployment

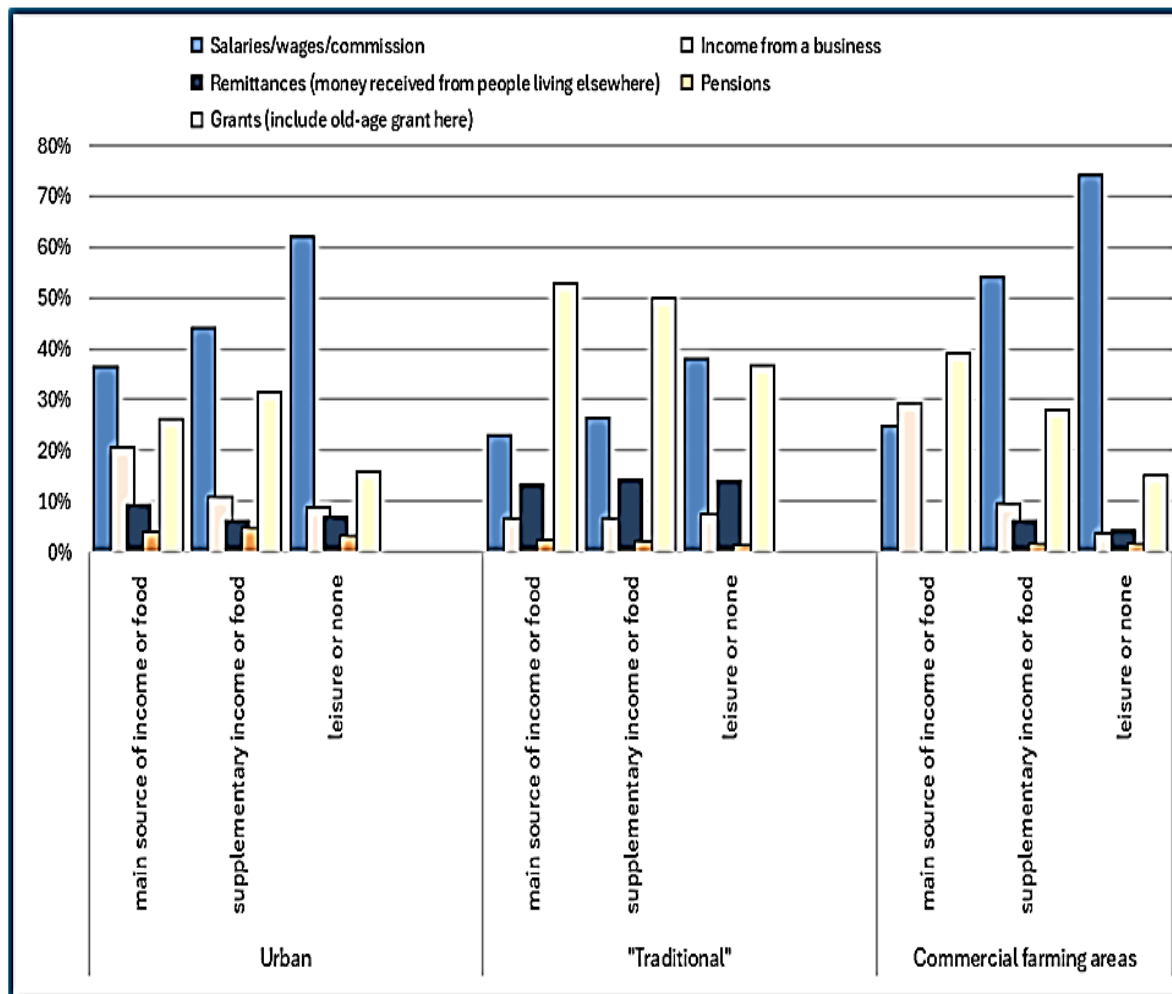
Median monthly income of farming and gardening in historic labour-sending regions



Source: Calculated from Statistics South Africa. General Household Survey, 2024. Electronic database. Database downloaded from ISibalo Data facility at www.statssa.gov.za in August 2025

- **Social Capital:** High reliance on social grants and remittances; SRD grant is a critical cushion.
- **Governance Challenges:** Fragmented authority between traditional leaders and municipalities creates conflict and confusion.
- **Disaster Response:** Municipal disaster funding is slow, unreliable, and fails to reach the most vulnerable rural areas in time.

Income sources for gardening and other households in the historic labour-sending regions, 2024



Source: Calculated from Statistics South Africa. General Household Survey ,2024. Electronic database. Database downloaded from ISibalo Data facility at www.statssa.gov.za in August 2025

Farming communities

- Communities at risk:
 - **Livestock Towns:** Central Karoo towns (e.g., Calvinia, Carnarvon) are highly dependent on livestock farming, which faces rising heatwaves and drought.
 - **Horticulture Towns:** Western Cape apple-producing regions (e.g., Elgin, Grabouw) are threatened by rising temperatures affecting winter chill.
- **Lack of Safety Nets:** Small-scale producers in these areas typically lack access to crop insurance and water-efficient technologies

Conclusion and takeaways

- Climate change is a "risk multiplier," deepening pre-existing inequalities.
- Farmworkers need targeted transition support (housing, skills, social protection).
- Support for household gardeners is a critical food security strategy.
- Urgent need to improve local governance and disaster response pipelines.



Thank you

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