

EXPANDING MARKETS FOR INDIGENOUS CROPS – A SUSTAINABLE PATHWAY TO FOOD SYSTEM TRANSFORMATION



The Case for Sorghum

A WILD Feast Dialogue

March 2, 2023

SUMMARY REPORT



ACKNOWLEDGEMENTS

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ACRONYMS

AAMP	Agriculture and Agro-processing Master Plan
DALRRD	Department of Agriculture, Land Reform and Rural Development (South Africa)
DSI-NRF	Department of Science and Innovation – National Research Foundation
FANRPAN	Food, Agriculture and Natural Resources Policy Analysis Network
FAO	Food and Agriculture Organization
NCD	Non-Communicable Diseases
VAT	Value-Added Tax
WILD	Wholesome, Indigenous, Local, Diverse

Content

A. Background	2
Objectives	2
Target Audience	2
B. Dialogue Overview	3
C. Sessions Highlights	3
1. Relevance of sorghum to transforming South Africa’s food systems.....	3
2. Market demand for sorghum.....	4
3. Market supply for sorghum.....	4
4. Aligning demand and supply markets for sorghum – Key challenges.....	5
5. Unblocking pathways to sustainable demand and supply markets for sorghum –	
Recommendations	6
D. Concluding Remarks	7
Annex.....	9
I. Position Paper	9
II. Selected List of Academic Papers on Sorghum.....	12
III. Dialogue Agenda	14
<i>Box 1. Agenda at a Glance.....</i>	<i>3</i>
<i>Figure 1. Trends in Sorghum Production and Consumption.....</i>	<i>5</i>

“Because sorghum has higher nutritional qualities...it can assist in addressing food insecurity and nutrition challenges in South Africa. However sorghum and sorghum-based products will be competing with other basic staples and highly processed, nutritionally poor food products.”¹”



“Many African indigenous crops ... nutritional powerhouses, are neglected, underrepresented in South African diets and mostly unknown to most young South Africans.”²”

¹ Study to Establish Market Opportunities for Sorghum in South Africa, DSI, 2021

² Professor Julian May, Keynote Address, WILDFeast Dialogue, 2023



EXPANDING MARKETS FOR INDIGENOUS CROPS - A SUSTAINABLE PATHWAY TO FOOD SYSTEM TRANSFORMATION. THE CASE FOR SORGHUM

A WILD FEAST DIALOGUE

A. Background

Objectives

The launch of WILD Feast – a market-oriented platform to promote Wholesome, Indigenous, Local, and Diverse (WILD) food products, is a follow-up initiative to the 2021 UN Food Systems Summit, which underscored the need for transformation in the way food is produced, accessed, and consumed. There was widespread acknowledgement that sustainable food systems should support people’s nutrition, health and well-being while conserving the environment. This dialogue – a feature of the WILD Feast platform, aims to facilitate on-going discussions among public and private sector stakeholders to support increased awareness of and action on market opportunities for indigenous systems and related food products, which are fully aligned to the food system transformation agenda

Within this context the Dialogue aimed to:

- increase awareness and generate discussion among stakeholders on key market opportunities for sorghum;
- identify key policy and program interventions to support maximizing sorghum market opportunities for transforming South Africa’s food system; and
- outline a Position Paper for promoting actions on identified policy and program priorities.

“This dialogue will assist in guiding the Government’s interventions to address the country’s vulnerability in food and nutrition security.” **Dr Jemina Moeng, Director, Food Security, DALRRD**

Target Audience

Public and private sector stakeholders were invited, including representatives from the Department of Agriculture, Land Reform and Rural Development (DALRRD), the Department of Health; international development organizations; academia, non-governmental organizations, health practitioners, and farmers, chefs, and other food and beverage producers.

Over 212 persons registered to the dialogue; 104 of whom participated.

B. Dialogue Overview

The 90-minute dialogue was chaired by Ms. Vuyo Lutseke, Shared Value Africa Initiative and delivered via opening remarks, a keynote address, and a panel discussion of private sector stakeholders. Discussions were aimed at answering five key questions. (See Box 1).

Box 1. Agenda at a Glance

The focus was on sorghum and discussions were aimed at answering 5 basic questions.

1. What is the relevance of indigenous systems and food crops, particularly sorghum, to the food system transformation agenda?
2. Is there demand at-scale?
3. Is there supply at-scale?
4. What are key issues faced in aligning demand and supply markets for sorghum and sorghum-based products?
5. What should be done to unblock pathways to ensure sustainable demand and supply markets for sorghum (and other indigenous food crops), to contribute to South Africa's food system objectives?

C. Sessions Highlights

1. Relevance of sorghum to transforming South Africa's food systems

"Sorghum is one of several indigenous crops that are resources for making our agriculture more resilient and our food system operate in a better way." Professor Julian May, Director, DSI-NRF, Center of Excellence in Food Security.

There is widespread acknowledgement that the current food system – the way food is produced, distributed, and consumed, is broken and contributes to the rise in under nutrition and malnutrition of populations, environmental degradation, and climate change. There is also substantive academic research, which show that indigenous systems

and foods are intrinsically linked to biodiversity, environmental conservation, and healthy lifestyles. Presentations made during the dialogue reiterated these positions:

- Based on its food consumption patterns, South Africa is suffering from the triple burden of malnutrition – deficiencies in macronutrient (protein); deficiencies in micronutrients (vitamin A and iron) and increases in non-communicable diseases (NCDs).
- The country is also experiencing adverse effects of climate change including increasing heat, drought, and soil salinity. Climate change is also acknowledged as a contributing factor to the emergence and spread of crop pests and infectious diseases such as COVID 19. These situations further threaten South Africa's food security and nutrition position.

- At the same time, research show that sorghum contains a range of nutrients that are beneficial to the human diet and has better climate change resilience than other crops, including maize.

2. Market demand for sorghum

'A lot of chefs in fine dining establishments are introducing sorghum as part of their plate offerings. This shows a shift is happening.' **Chef Mokgadi Itsweng, Plant-based Chef and Indigenous Food Activist.**

Despite data showing a decline in sorghum consumption in South Africa within the last two decades or so (see figure 1), there was consensus that globally and within Africa a robust demand market exists for sorghum with potential for market growth. The country's consumption of the grain moved from over 250,000 tons in 1997 to 150,000 tons in 2018. Increasing health consciousness among consumers is one of the key market drivers of sorghum demand. Another strong market driver is innovation in food, beverage, and non-food product development, such as sorghum breads, pasta, snacks, craft beers, and bio-packaging.

However, this demand in South Africa is still at a niche market level. Compared to other cereal foods, sorghum products retail at a higher price point. The price impacts access/affordability, for mainstream South African population, particularly for value-added sorghum products

Sorghum is often viewed as a food of the poor, notably by those living in urban areas. This negative stigma associated with the crop can be a threat to demand growth.

"Indeed, there is a market for sorghum but currently it's a niche market." **Ms. Sipamandla Manquele, Co-founder & Commercial Director, Local Village Foods**

3. Market supply for sorghum

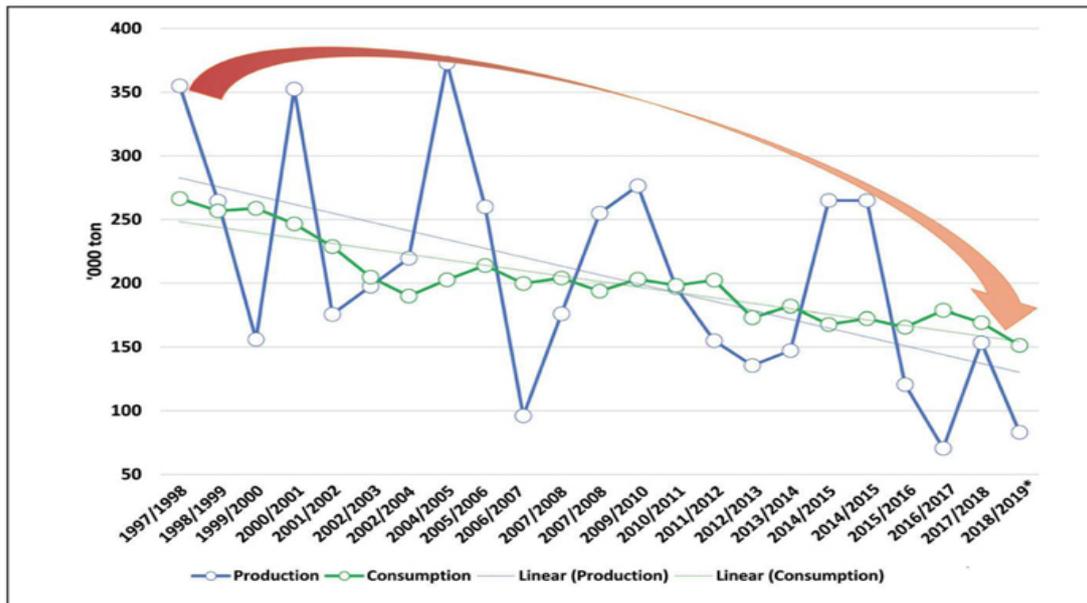
"Sorghum is one of the few crops that we have not been able to keep up with demand." **Ms. Siphwe Sithole, CEO, African Marmalade Farm**

Sorghum is regarded as the second most important cereal grain crop in Africa after maize, and globally it is the fifth most important cereal grain crop after maize, rice, wheat, and barley. In South Africa, sorghum is currently the sixth largest grain crop, after maize, wheat, soybean, sunflower, and barley. This contrasts with a decade ago when sorghum was the third largest grain crop after maize and wheat. A five-year average show that sorghum production in South Africa has been declining, with South Africa moving from being a net exporter of sorghum to a net importer³. Production has moved from about 350,000 tons in 1997 to less than 100,000 tons in 2018 (see Figure 1). Given production is below consumption volumes, South Africa has moved from being a net exporter of sorghum to a net importer. The bulk of sorghum production is undertaken by large-scale commercial farmers with limited cultivation by smallholder farmers.

³ Study to Establish Market Opportunities for Sorghum in South Africa, DSI, 2021

“It’s not easy to find sorghum. I believe if it was more accessible many other brewers would be using it. I think there is a broken link between the users and the farmers or maybe the farmers do not know there is a demand for sorghum in the craft beer industry. These are links that need to be established” Mr. Lethu Tshabangu, Co-Founder, Ukhamba, Beerworx

Figure 1. Trends in Sorghum Production and Consumption



Graph 1: Total South African sorghum consumption and production.

Source: SAGIS, 2018

*Outlook

** As presented in the keynote address, Professor Julian May

4. Aligning demand and supply markets for sorghum – Key challenges

Given its nutritional and climate resilient powerhouse attributes, given that it has been identified as a priority crop in the country’s National Development Plan, there are questions. Why does sorghum continue to be neglected? Why is it not mainstreamed on food shelves? Why is little known about it among the younger generation? Why is it not cited more in research work?

According to the DSI Study, the main reason for the decline in local sorghum production is decline in areas planted, as increasingly more farmers opt to plant more profitable crops, particularly maize and soybeans. The productivity of sorghum has failed to increase, in large part, due to a lack of development of new cultivars with agronomic performance.

‘You walk into a store in South Africa and you actually feel like a foreigner. Because if you come from the rural area, you don’t see the food you grew up with and you feel like you are lost.’ Ms. Mpho Tshukudu, Registered Integrative and Functional Nutrition Dietitian.

A key disincentive to investing in increased production in South Africa is the value-added tax (VAT) that is applied to sorghum products while maize and other cereals are subsidized. This taxation means that sorghum is unable to compete pricewise with other grain products.

Due to supply shortages in South Africa, farmers can sell their supply at import price parity. If there is overproduction, farmers will have to sell at export parity price and, particularly without a tax exemption, profits will be marginal, which is a disincentive to farmers.

This disincentive extends to owners of seed companies, who have curtailed or terminated their seed production programs in South Africa because of the diminishing role of sorghum on markets. Smallholder farmers, therefore, have the added challenge of accessing seeds.

“In terms of trade in this very important crop, there are some areas of concern when you look at the figures of import of this sorghum millet into Africa from other continents, despite the fact that we’ve got land, we’ve got suitable environment, and the consumption is very high in Africa.” **Dr. Babagana Ahmadu, FAO Representative in South Africa.**

Added to these challenges is what appears to be limited interest in sorghum from key stakeholders. On the consumer side, while there is an increasing interest from a health and wellness perspective, the stigma associated with sorghum as a food of poverty and rural living stifles interests. At the same time, smallholder farmers believe that there are no markets for sorghum, so they look to other crops as a source of economic livelihoods. Additionally, although research has been undertaken by academia, there are still gaps in research areas and the work that have been undertaken, for the large part, remains in academic journals and are not translated to the consumer. Further, as the keynote speaker highlighted, even the academic research on sorghum is not cited as frequently as other research papers. Finally, policy makers have indicated that the crop is a priority to national development agenda, yet other stakeholders in the value chain express frustration from what they see as a lack of sufficient government support to promote competitive production of the crop.

The above constraints are made even more intractable due to a lack of coordination in the food, and more specifically the sorghum value chain. Efficient value chain coordination would facilitate market match making, policy advocacy, technical assistance, innovating ideas, resource prospecting, research and assessment, and relationship building among chain stakeholders. These features are all instrumental to address the binding constraints highlighted and to facilitate a strong and thriving sorghum industry.

5. Unblocking pathways to sustainable demand and supply markets for sorghum – Recommendations

Responding to the supply deficit stands to benefit the Government’s food security and nutrition goals. Additional positive impact includes reduction of the national budget – via import substitution and creation of economic livelihoods resulting from the increased productive opportunities that expansion of production can create for farmers, food processors, and other sorghum product developers.

‘We want to come up with actions. Actions that are bold to make sure we transform the African food system.’ **Dr. Tshilidzi Madzivhandila, CEO, FANRPAN & Commissioner for Agriculture, National Planning Commission**

The DSI has outlined recommendations to support the growth of South Africa’s sorghum industry, which includes (i) promoting import substitution; (ii) increasing exports – particularly within the continent; (iii) increasing value-added products – including for exports; and (iv) increasing consumer awareness/demand.

Additionally, the dialogue highlighted some priority actions believed to be critical success factors for creating a robust and competitive sorghum sub-sector. These revolve around:

- (i) Education, particularly at the school level. There was a call for a strengthened curriculum that provide relevant food and nutrition education on sorghum and other indigenous crops.
- (ii) Research, particularly applied research, to better understand the food science aspect of the crop and to develop sorghum products that are nutritious, digestible, tasty, and convenient for consumers, especially urban dwellers. One must also ensure that work being done on product development and other research at the academic level reaches consumers. This is often not the case, as work often remains in academic journals.
- (iii) VAT exemption, without which sorghum remains on an uneven playing field with its competitor crops and products.
- (iv) Access to improved seeds and cultivars, without which production and productivity will continue to stagnate.

“FAO is highly committed in promoting the production, processing, and marketing of sorghum.” Dr. Babagana Ahmadu, FAO Representative in South Africa.

D. Concluding Remarks

South Africa’s food system is broken. The results are devastating impacts on the country’s social, economic, and environmental health. Nutritional and environmental resilience qualities inherent in sorghum, and other indigenous crops, should be leveraged to help transform South Africa’s food system.

But there is much more to a food system than crop production. Research, product development, distribution, storage, marketing, planning, sales, and managing relationships are a few examples of additional components that must be considered. Stakeholders in each of these components have their own specific needs. Connecting and supporting these actors along the value chain to ensure sustainable food systems require effective value chain coordination. Experience has shown that in cases where value chains are competitive, they are driven by a well-coordinated private sector with strong support from the public sector. The public sector support is important if smallholder farmers and other smallholder actors are to be fairly included in these value chains.

Dialogues such as this one, are useful tools to both raise awareness of the market opportunities for transforming food systems and facilitate partnerships that support value chain coordination.

Within this context, the recommendations outlined in the Position Paper (See Annex) is intended to build on and facilitate linkages with relevant past and on-going work in the sorghum and indigenous food space.

ANNEX

I. Position Paper

31 MARCH 2023

SOUTH AFRICA

POSITION PAPER – EXPANDING MARKETS FOR SORGHUM

Recognising the United Nations Member States’ commitment transforming food systems to ensure that they are biodiverse, local, and utilizing indigenous knowledge systems;

Recognising that the UN has designated 2023 as the year of the millet;

Recognising South Africa’s commitments made under at the Summit, including promoting indigenous food systems and related food products as priority objectives in its food system transformation agenda;

Recognising the country’s Agriculture and Agro-processing Master Plan (AAMP), which has identified improving localized food production, reducing food imports and facilitating market expansion as priority objectives for the agriculture sector;

Recognising South Africa’s National Food and Nutrition Plan 2018-2023, which has identified indigenous crops as important to the country’s food and nutrition security strategic objectives;

Recognising that sorghum has similar or even better nutritional profiles than South Africa’s most consumed crops, which are not indigenous to South Africa or Africa;

Recognising South Africa’s Department of Science and Innovation (DSI) identified sorghum as a key pillar of its bio-economy strategy;

Recognising that the DSI-funded 2021 **Study to Establish Market Opportunities for Sorghum in South Africa** concluded that “with South Africa’s extreme climate fluctuations and the expected warmer and drier conditions for the future, the key role of sorghum (a drought and flood tolerant crop) in food security can no longer be overlooked”;

Recognising that included among the recommendations of the 2021 DSI-funded, is a need for increasing exports, value added products, awareness of and demand for sorghum;

Acknowledging that current demand for sorghum in South Africa is primarily at niche market level;

Acknowledging that stigmas associated with sorghum persists at all levels within South African society;

Acknowledging that sorghum will have to be competitively priced to capture a fair market share of the increasing population's demand for food;

Acknowledging the many binding constraints, which act as disincentives to value chain stakeholders from investing in increasing sorghum production;

As an outcome of our engagement in the WILD Feast Dialogue, “**Expanding Markets for Indigenous Crops – A Sustainable Pathway to Food System Transformation. The Case for Sorghum,**” we the participants accept that:

- Many academic studies have shown that sorghum is intrinsically linked to environmental resilience, biodiversity, and healthy lifestyles.
- Investments in sorghum value chains and the agro-biodiversity and climate resilience they represent can contribute to healthier and more sustainable food systems and to South Africa's food security and nutrition goals and objectives.
- Coordinated efforts in branding and promotion, leveraging the nutritional and climate resilience qualities of sorghum can drive significant growth in demand markets.
- Education and skills training, application of innovations and technologies, VAT exemptions, access to quality seeds and improved cultivars, marketing, infrastructure, and stakeholder coordination are priority issues to be addressed for South African sorghum entrepreneurs to be competitive in the cereal grains markets.
- On-going and targeted dialogues among sorghum value chain stakeholders is necessary for facilitating coordination within the value chain and promoting the sorghum agenda.

We, the participants of the Dialogue recommend three sets of priority actions for follow up:

1. Undertake a stock taking of progress made on the recommendations of the DSI-funded 2021 **Study to Establish Market Opportunities for Sorghum in South Africa**, particularly recommendations on the VAT exemption and the germplasm development program. These can conceivably be the focus of the next dialogue. While the AAMP does not explicitly identify indigenous crops in its strategic objectives, efforts should be made to address policy issues specific to sorghum and other indigenous crops in the “built-in agenda” envisioned as part of the Plan's review process.
2. Agree on and execute a mechanism for ensuring input from relevant private sector stakeholders, particularly farmers and traders involved in sorghum and other indigenous crops, to elaborate the new National Food Security and Nutrition Plan
3. Outline a short-to medium-term program, which would seek a combination of investment and grant funding, to promote private-sector led activities to support the Study's recommendation for increased awareness and marketing of sorghum. These would take advantage of existing initiatives and/or calendar events, namely:
 - (i) World Food Day – plans for having a targeted program of activities in selected provinces to feature sorghum. In partnership with the Provincial Departments of Agriculture, this program could help support some of the pillars of the AAMP.

- (ii) World Tourism Day – selected provinces could be targeted to showcase South Africa’s agri-culinary heritages featuring sorghum to support South Africa’s commitment to agritourism, as outlined in the country report submitted at the conclusion of the 2021 UN Food Systems Summit. In partnership with the Department of Tourism, this program could be promoted as an annual initiative, which would expand over time to include other indigenous crops.
- (iii) Educational program for school children. Build on existing work to enhance the nutritional curriculum for school children.
- (iv) Promote 1-2 contract farming pilot project between smallholder farmers and manufacturing enterprises that require a sustainable supply of sorghum for their production. This is in line with the recommendations of the DSI-Study, which provides details on potential partners for such an initiative.
- (v) Fund further applied research on targeted topics related to market demand and supply and its impact on sustainable food systems to better inform longer-term policy and program design and implementation. In line with survey reports that show consumers/travellers are making decision on travel destinations based on accessibility to indigenous food experiences, an example of an applied research activity would be to assess how best to establish an indigenous food tour/route in South Africa, like that established by the wine industry.

II. Selected List of Academic Papers on Sorghum

1. Adetunji, A.I., Duodu, K.G. and Taylor, J.R.N., 2015. Inactivation of tannins in milled sorghum grain through steeping in dilute NaOH solution. *Food Chemistry*, 175, pp. 225-232.
2. Oladele, A.K., Duodu K.G., Emmambux N.M. (2020). Hydrolysis and antioxidant activity of starch modified with phenolic extracts from grape pomace and sorghum bran under alkaline conditions. *Carbohydrate Polymers* 240, 11629 (IF 6.0)
3. Duodu, K.G. and Awika, J.M., 2019. Phytochemical-Related Health-Promoting Attributes of Sorghum and Millets. In: Taylor, J.R.N. and Duodu, K.G. (Eds). *Sorghum and Millets: Chemistry, Technology, and Nutritional Attributes*, Second edition. Elsevier Inc. and AACC International, pp. 225-258.
4. Adarkwah-Yiadom, M. and Duodu, K. G., 2017. Effect of extrusion cooking and simulated in vitro gastrointestinal digestion on condensed tannins and radical scavenging activity of type II and type III whole grain sorghum. *International Journal of Food Science and Technology*, 52, pp.2282-2294.
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8. Adeyanju, A.A., Kruger, J., Taylor, J.R. and Duodu, K.G., 2019. Effects of different souring methods on the protein quality and iron and zinc bioaccessibilities of non-alcoholic beverages from sorghum and amaranth. *International Journal of Food Science & Technology*, 54(3), pp.798-809.
9. Ali E., E. E. and Ndiko, L., 2021. Antioxidant responses are associated with differences in drought tolerance between maize and sorghum. *Journal of Oasis Agriculture and Sustainable Development*. Special Issue June: 1-12. (student publication)
10. Apea Bah, F.B., Minnaar, A., Bester, M.J. and Duodu, K.G., 2016. Sorghum–cowpea composite porridge as a functional food, Part II: Antioxidant properties as affected by simulated in vitro gastrointestinal digestion. *Food Chemistry*, 197, pp. 307-315.
11. Duodu, K.G. and Dowell, F.E., 2019. Sorghum and Millets: Quality Management Systems. In: Taylor, J.R.N. and Duodu, K.G. (Eds)., *Sorghum and Millets: Chemistry, Technology, and Nutritional Attributes*, Second edition. Elsevier Inc. and AACC International, pp. 421-442.
12. Duodu, K.G. and Taylor, J.R.N., 2015. Effects of processing sorghum and millets on their phenolic phytochemicals and the implications of this to the health enhancing properties of sorghum and millet food and beverage products. *Journal of the Science of Food and Agriculture*, 95, pp.225-237.

13. Duodu, K.G., 2019. Assaying sorghum nutritional quality. In: Zhao, Z.Y. and Dahlberg, J. (Eds). *Sorghum – Methods and Protocols*. Springer Science Business Media, pp. 87-108.
14. Oladele, A.K., Duodu, K.G. and Emmambux, N.M., 2019. Pasting, flow, thermal and molecular properties of maize starch modified with crude phenolic extracts from grape pomace and sorghum bran under alkaline conditions. *Food Chemistry*, 297, (124879).
15. Taylor, J.R.N. and Duodu, K.G., 2019. Traditional sorghum and millet food and beverage products and their technologies. In: Taylor, J.R.N. and Duodu, K.G. (Eds). *Sorghum and Millets: Chemistry, Technology, and Nutritional Attributes*, Second edition. Elsevier Inc. and AACCC International, pp. 259-292.

III. Dialogue Agenda

EXPANDING MARKETS FOR INDIGENOUS CROPS

A SUSTAINABLE PATHWAY TO TRANSFORMING FOOD SYSTEMS – THE CASE FOR SORGHUM

MARCH 2, 2023

A WILD FEAST™⁴ DIALOGUE

AGENDA

CHAIR: Ms. Vuyo Lutseke, Head, Stakeholder Relations, Funding, and Partnerships; Shared Value Africa Initiative (SVAI)

10:00-10:05 WELCOME & SETTING THE STAGE

Chair: Ms. Vuyo Lutseke

10:05-10:20 OPENING REMARKS

Dr. Tshilidzi Madzivhandila – CEO, Food, Agriculture and Natural Resources Policy Analysis Network (FANRPAN)

Dr. Babagana Ahmadu –Country Representative, Food and Agriculture Organization (FAO)

Dr. Jemina Moeng – Chief Director, Food Security, Department of Agriculture, Land Reform, and Rural Development

10:20-10:35 KEYNOTE ADDRESS

A response to the findings and recommendations of the “Study to Establish Market Opportunities for Sorghum in South Africa,” Department of Science and Innovation (DSI), 2021.

Presenter: Professor Julian May – Director, DSI-National Research Foundation, Centre of Excellence in Food Security

10:35-11:10 PANEL DISCUSSION

Chef Mokgadi Itsweng – Plant-based Chef and Indigenous Food Activist

Ms. Siphwe Sithole – CEO, African Marmalade Farm

Ms. Sipamandla Manquele – Co-Founder & Commercial Director, Local Village Foods

Ms. Mpho Tshukudu – Registered Integrative and Functional Nutrition Dietitian

Mr. Lethu Tshabangu – Co-Founder, Ukhamba Beerworx

11:10-11:20 Q&A

11:20-11:30 CLOSING REMARKS

Dr. Tshilidzi Madzivhandila – CEO, FANRPAN

Ms. Jeanette Sutherland – CEO/Founder, AgriLuxe Marketing

⁴ An AgriLuxe Marketing platform, which was launched on March 4, 2023, to promote Wholesome, Indigenous, Local, and Diverse (WILD) crops and food products.