



PATHWAYS TO INSECURITY:  
URBAN FOOD SUPPLY  
AND ACCESS IN SOUTHERN  
AFRICAN CITIES

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JONATHAN CRUSH & BRUCE FRAYNE

SERIES EDITORS

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“In order to understand cities properly, we need to look at them through food.” (Carolyn Steel, *Hungry City*, 2008)

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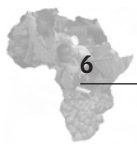
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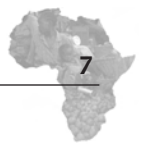
# I INTRODUCTION

The new international food security agenda places the small farmer at the centre of its efforts to resolve the growing problem of food insecurity in Africa.<sup>1</sup> This agenda has very little to say about the feeding of cities and the food security of urban populations.<sup>2</sup> Amongst urban populations, the main determinant of food insecurity is not production but accessibility. In urban areas, accessibility depends primarily on the individual or household's ability to purchase foodstuffs which in turn hinges on household income, the price of food and the location of food outlets.<sup>3</sup>

Food may be economically accessible (affordable) but spatially inaccessible (food outlets are located too far away or difficult to get to). On the other hand, it may be spatially accessible (supermarkets are springing up everywhere) but economically inaccessible (the food on the supermarket shelves is unaffordable). The absence of a sustained or reliable income source constitutes the major obstacle to food access by the urban poor in Southern Africa. As Mougeot notes, cash incomes for the urban poor are low and unreliable and quality food is often unaffordable: "The capacity of the urban poor and middle class to purchase the good-quality food they need is undermined by a number of factors: currency devaluations; reduced purchasing power; salary reductions; formal-job retrenchment and the informalisation of employment; elimination of subsidies for needs such as food, housing, transportation, and health care; and the very uneven access of different income groups to retail food within cities."<sup>4</sup>

The food supply in Southern African towns and cities rests on "a very well developed, highly sophisticated food marketing [and production] system ... and a well organised informal food marketing system."<sup>5</sup> The informal sector plays an essential role in the provisioning of urban households and especially in making food available to the urban poor. For Kessides, informality is "the main game in town."<sup>6</sup> The informal marketing system includes informal markets, street traders, food vendors and spazas (informal sector shops). Much of the existing literature on the informal sector focuses on its role in employment generation; its social, spatial and gender characteristics; and the highly ambivalent response of municipal authorities and planners to informality.<sup>7</sup> These are all important issues for urban food security since the sector is an important income source for many urban households and the way in which it is regulated (or not) also impacts directly on availability and access to cheap food and other commodities and services.

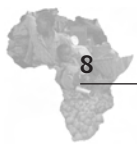
Agribusiness companies are changing the face of urban food supply in



Africa, as they have already done across the developing world.<sup>8</sup> Accompanying and facilitating this trend has been the widespread withdrawal of the African state from food marketing and subsidization.<sup>9</sup> The last two decades have witnessed the growth and consolidation of modern agribusiness food supply chains across the sub-continent. This process, sometimes known as “supermarketisation,” is coordinated and driven by large and highly competitive local and international agribusiness companies that aim to control and profit from all stages of the food supply chain from “field to fork.” The marketing brands are familiar to all: Pick n Pay, Shoprite, Woolworths and so on. Even the American giant, Walmart, is now rumoured to be on the way. Since the private sector is going to play an increasingly important role in urban food supply in Southern Africa, policy-makers and donors need to readjust their fixation with the small farmer and understand the operation of modern urban food systems much better than they currently do. If the evidence from other parts of the world is any guide, it is these agribusiness food chains, not small farmers, that are key to urban food security. The best that small farmers can hope for is some form of integration into these chains although it is always more likely to be on terms that are more advantageous to the company than the farmer.

While the formal-informal distinction is a useful starting point, there are many points of intersection between the two sectors. The informal marketing system, for example, sources many of its processed and fresh food products from the formal system. Or again, formal sector supermarket expansion impacts upon the operations and profitability of small-scale informal food vendors.<sup>10</sup> As Kennedy et al point out: “Competition for a market share of food purchases tends to intensify with entry into the system of powerful new players such as large multinational fast food and supermarket chains. The losers tend to be the small local agents and traditional food markets and, to some extent, merchants selling “street foods” and other items.”<sup>11</sup> Consumption patterns are becoming more universalised even as poorer socio-economic groups “drift towards poor-quality, energy-dense but cheap and affordable foods.”<sup>12</sup>





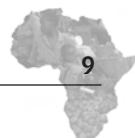
## 2 AGRIBUSINESS FOOD CHAINS

According to nutritionist Angela Mwaniki, formerly of the UN and now at General Mills, agribusiness exists “to extend a hand to help communities in Africa achieve food security.”<sup>13</sup> Some food companies “help communities meet their basic need for food in times of famine.” Others go further: “they donate food to schools, support school-based community farming projects, and at times provide books and scholarships.” Such a benign view of corporate involvement in the agricultural and food sector in Africa diverts attention away from the central fact that food corporations are not NGOs and cannot be expected to behave like them. Corporate “social responsibility” is an important sideline of agribusiness in Southern Africa but the prime objective is profit-making, not reducing the food insecurity of the urban poor.<sup>14</sup>

The supply chains that link sites of production to urban consumers in Southern Africa have recently begun to be explored by the Regoverning Markets Project at the University of Pretoria.<sup>15</sup> The Project was established to examine the potential for integration of small farmers into agribusiness supply chains but provides important collateral information on agribusiness itself.<sup>16</sup> Their evidence suggests that there has been a rapid transformation of the Southern African food sector in the last decade. Consolidation and corporate concentration are major features of the agribusiness food supply chain, along with increased investment and “takeovers” by global agribusiness corporations (for example, Danone and Parmalat in the dairy sector.)<sup>17</sup> Most urban households interact with the supply chain at the point of food purchase (from formal or informal retail outlets). But the major retailers are only the public face of an integrated chain of distribution, wholesaling, processing, transportation and production (Figure 1).

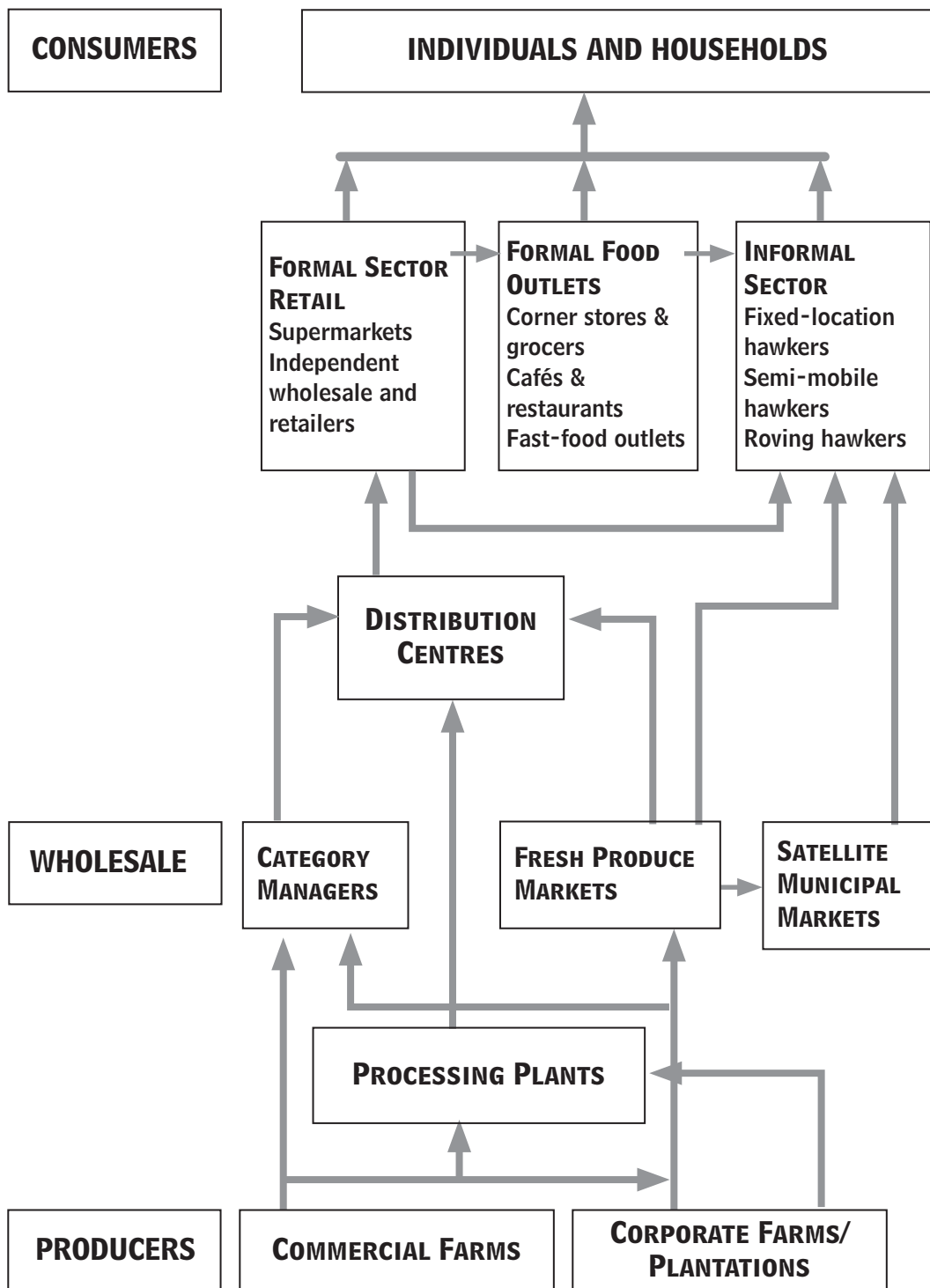
The major producers of foodstuffs for urban markets in South Africa are large privately-owned commercial farms and agribusiness estates and plantations.<sup>18</sup> The opportunities for small-scale farmers, including urban producers, to break into this highly centralized system of corporate control are limited:

Currently there is little scope for small-scale producers or processors to compete with or be integrated with large-scale food processors in South Africa supplying the modern food system. In fact, small-scale processors supplying traditional markets with products such as bread, traditional beer, rice, meat and dairy products are under pressure and in no position to challenge the large-scale food processors in terms of supplying large supermarkets.<sup>19</sup>



**FIGURE 1**

Modern Agri-Food Supply Chain



An estimated 1.3 million households in rural South Africa have access to land for farming (a number that declined by over 20% between 2002 and 2006).<sup>20</sup> Yet, most of these households undertake agriculture to supplement household food requirements and not for market. In 2006, less than 50,000 households (3.7%) recorded sales of farm produce as their primary source of income. Far more important were social grants (the most important income source for 50% of these rural households), wage employment (23%) and remittances (19%) (Table 1).

Income Source	No. of Households	%
Social grants	642,520	50.4
Wage employment	292,229	22.9
Remittances	237,189	18.6
Sale of farm produce	47,787	3.7
Other income	39,680	3.1
No income	12,188	1.0
Unspecified	3,781	0.3
Total	1,275,374	100.0

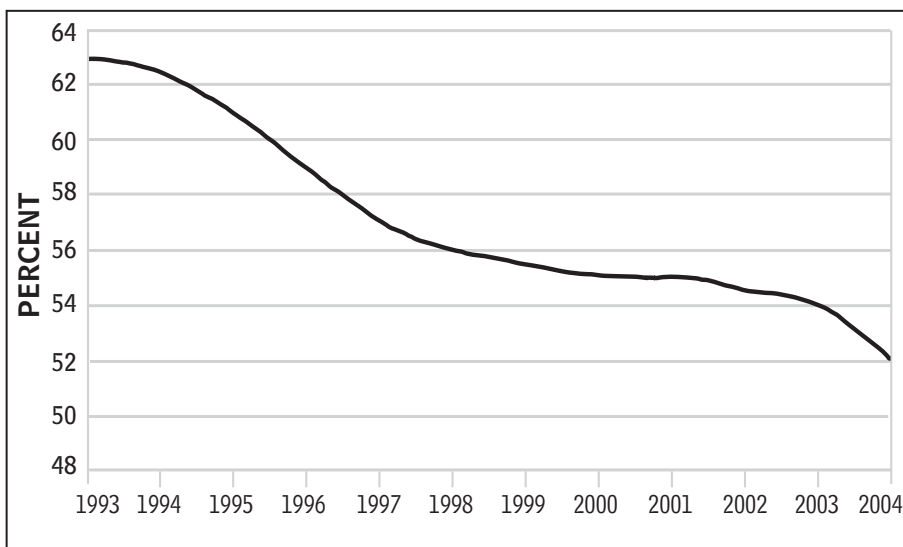
*Source: Vink and Van Rooyen, "Economic Performance of Agriculture in South Africa" p.13.*

Food processing is dominated by a small number of firms (5% of the firms produce 75% of the output). Urban wholesaling of fresh fruit and vegetables was the domain of Fresh Produce Markets (FPMs) until recently but the FPMs are declining in importance as supermarkets use "category manager" companies and affiliates for the procurement of produce (Figure 2).<sup>21</sup> Supermarket chains increasingly source from a small number of dedicated and specialized suppliers and have their own network of national Distribution Centres from which products are distributed. Supermarkets currently account for about 55% of national food sales in South Africa. Urban food retailing in South Africa is thus increasingly dominated by a small number of major supermarket chains who are moving to consolidate their control over the whole food supply chain (Table 2).

South Africa might be viewed as an exception in the SADC region in terms of the central role of modern agricultural supply chains in

**FIGURE 2****Food Produce Market (FPM) Share of Market, 1993-2004\***

\* Potatoes, tomatoes, cabbage, onions, pumpkins, carrots



Source: Louw et al, "Restructuring Food Markets in South Africa" p. 22.

provisioning the cities. However, it could equally be argued that South Africa is simply further along a pathway that all will eventually follow. Certainly, South Africa itself is poised to play a leading role in the transformation of urban food supply systems across the region. Since 1994, there has been a major push by the big South African supermarket chains into other SADC countries.

The South African-based Shoprite group of companies, which targets middle and lower-income consumers, expanded rapidly into the rest of Africa after 1990. Shoprite is now Africa's largest food retailer, operating over 800 outlets in 17 countries across the continent. Shoprite operates in 12 SADC countries, Woolworths in 10, Pick n Pay in 4 and Spar in 3 (Table 3). Metcash has a large retail and wholesale presence in Malawi (115 outlets) and Zimbabwe (42 outlets). The market share of the supermarket chains is growing in each country in which they operate. The bulk of their processed products and fresh produce are sourced from South Africa. Shoprite has 21 stores in Namibia and sources 50% of its inventory from South Africa. Angola's four Shoprite stores source 99% of their fresh fruit and vegetables from South Africa. Pick n Pay sources 70% of its produce from South Africa.

	No. of Stores	2005 Sales (R million)	Market Share (%)
Shoprite	881	29,965	20.5
Pick n Pay	536	29,167	20.0
Massmart	212	25,843	17.7
Metcash	596	14,705	10.0
Spar	794	12,191	8.4
Sub-Total	3,019	111,871	76.6
Other		34,123	24.4

Source: Louw et al, "South Africa" p. 73

Company and number of outlets						
Country	Shoprite	Pick n Pay	Spar	Woolworths	Metcash	Massmart
Angola	3				*	
Botswana	*	3	24	12	*	9
Lesotho	*			2		2
Malawi	2				115	1
Mauritius	1			1		1
Mozambique	*			1	*	1
Namibia	21	11	23	4		2
Swaziland	*	2	6	2		
Tanzania	4			1		1
Zambia	17			1	*	1
Zimbabwe	1			2	42	2

\* Company present but number of outlets unknown

Source: Compiled from corporate websites

Most of the existing literature focuses on the implications of supermarket expansion for small farm producers, a common theme globally.<sup>22</sup> Information on the impact of supermarket expansion on urban food security in the SADC region is surprisingly sparse. The one major study of the impact of supermarkets on the food security of the poor was conducted in rural villages in the Eastern Cape.<sup>23</sup> The study had the virtue of demonstrating how important supermarkets have become even to rural residents, let alone their urban counterparts.

Zambia is proving an important laboratory for understanding the conflicts and contradictions of supermarket expansion and the impact of regional agribusiness supply chains. As Mason and Jayne observe:

Urban food marketing system performance in Zambia will need to take into consideration the demand patterns of urban food consumers. Urban consumption patterns will increasingly determine the opportunities available to small-scale farmers. Accurate information on urban consumer preferences can also help identify key leverage points and investment priorities to improve the performance of the food marketing system.<sup>24</sup>

A 2007–8 Urban Consumption Survey interviewed 1,865 urban households in four Zambian cities (Lusaka, Kitwe, Mansa and Kasama). The Survey found, *inter alia*, that (a) wheat had overtaken maize as the most important staple amongst urban consumers, except among the urban poor; (b) urban staple food diets were becoming more diversified; (c) retail grocers and market stalls accounted for 60% of the total value of staple purchases by urban households and (d) supermarkets had 5–17% of the total value of staple purchases by urban households. In Lusaka, the poorest consumption quintile sourced only 1.2% of their staple purchases from supermarkets, compared with 28% for the wealthiest quintile. For Mason and Jayne this illustrates both the “staying power” of small-scale retailers and that urban consumers are “heavily dependent” upon non-supermarket, informal retail outlets.<sup>25</sup> A related study of the tomato sub-sector in Zambian cities by Mwiinga seems to confirm these observations, showing that 90% of the tomatoes marketed in Lusaka are currently produced by small farmers and marketed through open air markets.<sup>26</sup> The market share of the South African-dominated supermarket sector is only 10%.

Although supermarket growth is therefore relatively limited at present, the real question is whether Zambia will follow trends already observed in other parts of the world and the SADC region. Certainly, there is no doubt that the presence and visibility of South African supermarket chains is growing rapidly. Shoprite's expansion into Zambia began in 1995 as part of a privatization deal with government. In 1996, the first retail store opened in Lusaka. Further stores opened later that year in Ndola and Kitwe. Then, four stores were opened in Kabwe, Chingola, Mufulira and Livingstone. Between 1997 and 1999, a further six stores opened. By 2005, Shoprite Zambia operated 18 retail supermarkets and seven Hungry Lion outlets (for fast food). Freshmark, the company's distributor of fresh fruit and vegetables, operates depots in Lusaka and Kitwe. With 39 percent of the domestic retail market, Shoprite is the largest retailer in Zambia. As Miller notes:

The impact of Shoprite in Zambia has been as diverse as the various urban and rural settings in which it is situated. A highly ambiguous set of responses from local consumers, workers and business-people has emerged. Many consumers have welcomed the availability of a greater variety of higher quality goods, as well as the presence of more modern and efficient shopping facilities. Local informal market retailers and rural traders have drawn heavily on Shoprite as a wholesale supplier, and at least one Lusaka store has been converted mostly into a wholesale operation in response. At the same time, much of the product line in Shoprite stores is beyond the purchasing power of the urban poor, and informal sector producers have often experienced displacement in local markets for basic foodstuffs.<sup>27</sup>

Shoprite's stated policy is to establish and support local supply chains. In practice, the highly centralised form of sourcing and distribution within the chain, along with weaknesses on the part of local producers in Zambia, have undermined the "fit" between South African retailers and local suppliers. Shoprite sources most of its processed products from South Africa although some fresh produce is obtained locally.<sup>28</sup> Zambian distribution is centrally organised from Cape Town. Centralised sourcing "directly affects the regional supply chain."<sup>29</sup>

In 2001, about 65 percent of Shoprite products originated in South Africa, with some perishable items coming from Zimbabwe. In one area, local farmers complained that Shoprite had "stolen their market" as vegetables that they had regularly sold at the local town market were now being supplied from South Africa. In the dairy industry, increasingly dominated by a South African-based subsidiary of Italian Parmalat,

there are more opportunities for local suppliers.<sup>30</sup> However, 70% of raw milk is received from large commercial farmers. How these rapid shifts will influence urban food security in the future is very much open for investigation and analysis.

The general conclusion from Zambia seems to be that the informal sector remains extremely vibrant in Zambian cities and will not be significantly impacted by modern agri-food supply chains driven by South African supermarkets. In fact, as we will show below, supermarkets are already a critical component of the food procurement strategies of poor urban households throughout the region and may become even more important as time goes on. However, it is true that the informal sector is still extremely important in the food sector of most urban areas in SADC. In Southern Africa as a whole, informal markets, informal traders and street foods continue to play a critical role. In 2006, for example, informal markets accounted for more than 90% of market share of fresh fruit and vegetables marketed in most low-income SADC countries.<sup>31</sup> The next section of the paper therefore examines what we currently know about the role of the sector in promoting food availability and accessibility for the urban poor.



### 3 INFORMAL FOODS

A common criticism of the growing power and reach of supermarkets globally is that they have significant negative impacts on food availability for the urban poor, eradicating smaller stores and local markets aimed at the poor consumer and encouraging greater dependence on these large retail outlets for food.<sup>32</sup> Louw et al suggest that the same trend may be evident in South Africa:

South Africa's informal economy ... has been one of the largest employment creators in recent times (but) it is also facing a number of challenges and threats. One of the primary threats is the encroachment of supermarkets into areas traditionally occupied by the informal market. There is, for example, strong evidence that the informal sector is losing significant market share as a result of the encroachment of supermarkets into the territories occupied by the informal sector. Reportedly between 2003 and 2005 spaza shops' turnover in some areas was reduced by as much as 22 per cent. Traditional vegetable shops or greengrocers are reportedly also being displaced or disappearing completely as a result of their inability to compete on cost and product ranges against large food retail groups.<sup>33</sup>

Defenders of agribusiness and supermarkets argue that the greater purchasing power of supermarkets and economies of scale actually benefit the urban poor because of cheaper prices and benefit the rural poor through smallholder farmers who have a new and ready market.<sup>34</sup>

Even though supermarkets are more visible and offer cheaper food, the urban poor do not necessarily increase their food security by shopping at supermarkets. Food provisioned informally may be more expensive than supermarket food, but continues to be the choice of the urban poor because of geographical access to these retailing formats. Increased proximity and physical access is by no means equal to real or actual access, taking into account issues of inflation, transportation costs and the inconsistent provision of electricity. The provision of electricity in many informal areas is at best unreliable and often non-existent. Fresh food buying has to be done on a daily basis because of the lack of refrigeration. Access to refrigeration, then, becomes a determining factor in actual access to food.

In one study in Tshwane Metro, Madevu argues that supermarkets have had a major impact on corner stores and greengrocers but that the informal sector has been more resilient.<sup>35</sup> This is primarily because competition is spatially differentiated in the South African city. Competition between



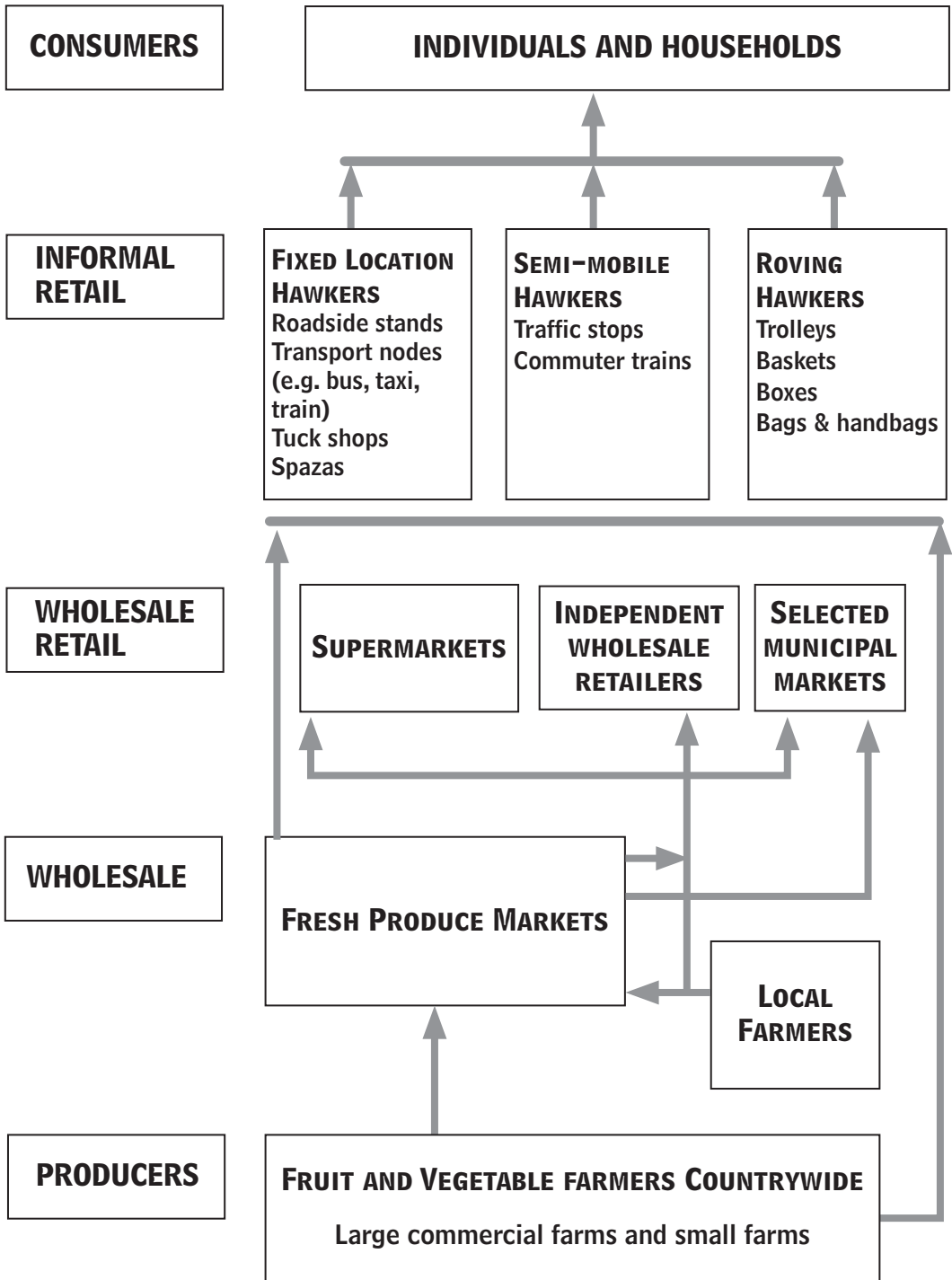
supermarkets, greengrocers and informal food hawkers occurs mainly in middle-income areas. Supermarkets dominate high income areas and hawkers continue to dominate low income areas. Abrahams makes a similar argument about informal sector resilience in Johannesburg.<sup>36</sup> While smaller outlets and corner stores may have closed down, informal markets have emerged in informal settlements, slums and residential compounds.

Nevertheless, the relationship between supermarket growth and the informal urban food supply is extremely dynamic, particularly as supermarkets are aggressively seeking out new urban markets. In Alexandra in Johannesburg, for example, the new Pan Africa Shopping Centre has a Pick n Pay supermarket at its centre. The Alexandra Pick n Pay franchise is part of the supermarket chain's push into urban townships. Rival Spar opened 15 stores in townships in early 2009. According to Pick n Pay, their presence was a boon for informal traders who could source products from the supermarkets and sell on to consumers.<sup>37</sup> However, this ignores the obvious point that by definition prices are lower at the supermarkets that are also increasingly accessible to poor urban consumers.

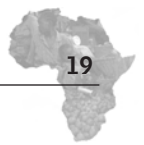
The size and importance of the informal food sector is evident even to the most casual visitor to cities in Southern Africa. Some of the complexity is captured in Figure 3. In 2000, there were an estimated 500,000 street traders in South Africa (more than 70% women), a number which has probably grown considerably since then.<sup>38</sup> More than 70% of all street traders in the country sold food; in other words, 350,000 traders across the country. In the Durban (eThekweni) metropolitan area there were about 20,000 traders and in Greater Johannesburg, 12-15,000. In Durban alone, street traders sold about 28 tonnes of cooked mealies (corn) every day.<sup>39</sup> Informal street food and markets are particularly important to the residents of poor informal settlements.<sup>40</sup>

A project on the street vending of cooked food found that there were 5,355 vendors in Lusaka and 1,100 vendors in Harare.<sup>41</sup> In both cities, over 80% of the vendors were female household heads and 60% of the women had no other source of household income. Cooked food vending was found to provide "a major source of employment, income and nutritional intake for the urban poor in Lusaka." Collectively the vendors employ 16,000 people, serve more than 81 million meals of nshima and beef stew per year, and make an annual profit of over R600 million.

**FIGURE 3**  
Urban Informal Food Supply Chain



Source: Adapted from Madevu, “Competition in the Tridimensional Urban Fresh Produce Retail Market”



One of the primary characteristics of informal food marketers in Southern African urban areas is their great mobility not only within but also between cities. Informal food trading networks link countryside and city, urban areas within the same country, and major urban centres in different countries of the region. To date, case study research on informal cross-border trade has examined the organization of the trade, the scope of trader activities and the impact on trader households.<sup>42</sup> These studies suggest that income from these businesses have a significant impact on household livelihoods and that many informal traders employ people in their businesses. These surveys have also shown that the trade is dominated by women and provides them with a significant degree of economic independence. The most important question here is the contribution that trading in foodstuffs makes to the incomes and food security of trader households and the role that the trade plays in making food more readily available to poor urban populations throughout the region.

Informal traders carry a wide variety of agricultural produce and processed foodstuffs for sale and re-sale. Some monitoring of informal trade in agricultural produce has been undertaken at border posts around the region. Studies of food security and unrecorded cross-border trade in the late 1990s concluded that the volume of informal trade in agricultural products at border posts between Tanzania, Malawi and Mozambique and their neighbours was very significant and exceeded that of large-scale formal sector trade at some border posts.<sup>43</sup>

Since 2004, the WFP and Famine Early Warning System Network (FEWSNET) have monitored volumes, prices and directions of informal cross-border food trade (maize, beans and rice) at 24 border posts across the SADC region on a daily basis.<sup>44</sup> Between 2005 and 2008, Malawi and the DRC were major destinations for informal trade in maize, and Mozambique and Tanzania were major origin countries. Zambia was an exporter to Zimbabwe and an importer from Tanzania. The major trading corridors were Mozambique and Tanzania to Malawi. The major rice exporters were Zambia and Malawi while Zambia was the main exporter of beans. The data shows that the volumes of informal trade are significant, largely unidirectional and vary seasonally and from year to year. The determinants of the striking variations in annual and monthly informal trade flows have yet to be systematically analysed but seem to be related to the availability of food in the destination country. The FEWSNET methodology does not trace the food routes beyond the border post, how and where food is marketed and whether or not informal food imports play any role in reducing urban food insecurity.<sup>45</sup>

Another study of informal trade undertaken by SAMP at 20 border posts

across the region in 2005–6 provided a profile of cross-border traders and important data on a broad range of traded goods, including fresh and processed foodstuffs.<sup>46</sup> This large-scale monitoring exercise of over 205,000 people, including 85,000 traders, passing through the border posts confirmed the existence of widespread informal trade in food products. Groceries were most likely to be carried by traders entering Mozambique and Zimbabwe (70% for both countries) (Table 4). Almost 30% of all traders entering Zambia, and over half (56%) of traders entering through Livingstone, were carrying groceries. More than half the traders travelling between Namibia and Angola and Zambia were carrying groceries. As regards perishable foods, fresh fruits and vegetables were most likely to be carried into Lesotho (31%), Botswana (28%) and Mozambique (21%). Meat, fish and eggs were also carried by traders travelling to Mozambique from South Africa and Swaziland.

Country of Destination	Groceries (% of traders)	Fruit/Vegetables (% of traders)	Meat/Fish/Eggs (% of traders)
Botswana	8.1	26.7	1.2
Lesotho	10.4	31.3	1.5
Malawi	17.7	7.0	0.3
Mozambique	69.9	21.0	60.9
Namibia	56.3	16.4	5.8
Swaziland	3.6	6.8	0.4
Zambia	29.2	13.5	7.6
Zimbabwe	69.5	1.6	1.5

Source: SAMP

The survey also provided important insights into the manner in which informal traders market their goods, including foodstuffs (Table 5). Once again, the degree of inter-country variation is striking. In Malawi, for example, the majority of traders (57%) sell their goods in their own shops. In no other country are trader-owned stores a significant outlet (with the partial exception of Namibia at 23%). In Mozambique, 75% of the traders sell their goods in informal markets (either at stands they own or on other stands). In Namibia, 63% of traders use informal markets while in Malawi and Swaziland, less than 20% use informal markets. In Lesotho, mobile door-to-door selling is the most important outlet while in Swaziland, Zambia and Zimbabwe most traders use informal networks of family and friends to sell their goods. Why this should vary so much from country to country is unclear without further research.

TABLE 5: Marketing of Goods Carried by Informal Cross-Border Traders						
Country of Destination	Own shop	Own stall in informal market	Sell in informal market	Sell door to door	Friends/family/networks	Retailers/shops restaurants
PERCENTAGE						
Botswana	2.7	20.2	12.1	29.8	24.6	3.4
Lesotho	1.5	17.9	26.9	31.3	22.4	0.0
Malawi	56.7	7.9	12.2	16.2	17.1	14.6
Mozambique	7.8	54.9	19.6	8.6	5.6	6.8
Namibia	23.4	39.3	31.4	13.8	8.9	1.0
Swaziland	10.4	14.7	8.0	18.8	43.9	3.7
Zambia	5.1	24.0	29.9	6.1	39.2	13.9
Zimbabwe	4.3	8.2	31.1	7.3	40.0	8.3

Source: SAMP

Border monitoring studies have demonstrated the importance of informal food trading across the region. They have also shown the massive bureaucratic obstacles, including widespread official corruption, that inhibit the free flow of foodstuffs through borders and eat into the income of traders themselves.<sup>47</sup> Further research is needed on whether and how traded food finds its way into urban food supply channels, how it contributes to the food security of trader households and whether it improves food availability for poor urban households in countries of destination. Also unclear is the relationship between informal cross-border trade and sale and the food security of households who are able to buy this source of food and the traders themselves.

## 4 INCOMES AND FOOD ACCESS

The informal economy accounts for an estimated 78 percent of non-agricultural employment in Sub-Saharan Africa, 93 percent of all new jobs created, and 61 percent of urban employment.<sup>48</sup> However, informal sector employment and income is invariably irregular, unpredictable and provides no benefits. As a result, poor households tend to diversify their income sources as a basic livelihood strategy. Income comes from a variety of sources, the importance of which varies from household to household and in one household over the course of the year. Common sources include formal employment, piecework, casual labour, informal sector activity (including purchase and sale of foodstuffs), pensions, child welfare grants, disability grants, sale of urban agricultural produce, remittances, loans, gifts, charity and revolving payments by informal associations (such as savings groups and burial societies).

Two recent studies in Southern Africa illustrate different aspects of the importance of cash incomes to urban household food security. Mkambisi's research in Blantyre and Lilongwe, Malawi, shows how the relative importance of different income sources varies between middle and low-income and male and female-headed households (Table 6).<sup>49</sup> Formal sector employment was the most important source of household income (60% on average), followed by urban agriculture (17%), business (16%), rural agriculture (5%) and only then informal employment (at less than 2%). However, important differences emerged within the sample. In Blantyre, urban agriculture is a relatively more important source of income than in Lilongwe (25% versus 10%), while formal employment is more important in Lilongwe. Informal employment is relatively insignificant in both cities.

Urban agriculture was the most important income source for poorer households in both cities (42.5%), followed by business and formal employment (at 26% each). In comparison, urban agriculture was a relatively insignificant income source for better-off households (at 3%) whose main source of income was, unsurprisingly, formal employment (at 80%). Significant differences also emerged by gender. Urban agriculture was the most important source for female-headed households (at 55%), compared with only 4% for male-headed households. On the other hand, 63% of the income of male headed-households came from formal employment, compared to only 24% for female-headed households.

TABLE 6: Primary Source of Household Income in Blantyre and Lilongwe					
	Formal Employment	Informal Employment	Business	Urban Agriculture	Rural Agriculture
PERCENTAGE					
Lilongwe	66.7	1.2	17.6	9.7	4.8
Blantyre	53.9	2.4	13.9	24.8	4.8
Low-Income	25.8	3.3	25.8	42.5	2.5
High-Income	80.0	1.0	10.0	2.9	6.2
Female-Headed	24.1	0.0	17.2	55.2	3.4
Male-Headed	73.3	2.5	15.2	3.7	5.3
Total	60.3	1.8	15.8	17.3	4.8

Source: Mkwambisi, “Urban Agriculture and Food Security”

A second study by Mosoetsa in Mpumalanga and Enhlalakahle Townships in the eThekewini (Greater Durban) Municipality of South Africa shows how the loss of formal sector employment impacts on urban household food security.<sup>50</sup> Many people were employed in the footwear and the clothing and textile sectors which underwent major downsizing and layoffs in the late 1990s. By 2001, Enhlalakahle was home to 7,027 people of whom 1,770 were employed and 2,948 were unemployed. Mpumalanga had a population of 26,496 of whom 4,227 were employed and 13,146 were unemployed. Households responded to the loss of formal sector wage income by adjusting their livelihood strategies. Some retrenched workers obtained lower-paying employment in other sectors and areas, in retail shops, in fast food outlets and as domestic workers while others turned to selling curios, clothes, cooked food, fruit, and vegetables. The few from Enhlalakahle who could afford the expensive 90km fare to Pietermaritzburg got jobs in the footwear sector’s garage-type and sweat-shop factories. The options for alternative employment for Mpumalanga residents were more limited and the majority of those who had worked in the textile factories remained unemployed with new entrants in the labour market joining their ranks.<sup>51</sup>

Rising unemployment had catastrophic impacts on levels of food insecurity in households in both of these areas:

The burden of survival has shifted radically to the household, pushing it to the brink of collapse. These households are not, as proposed in the livelihoods literature, managers of complex assets. In fact, many households do not have assets to speak of. As their resources diminish, they are increasingly vulnerable to poverty. Their vulnerability is



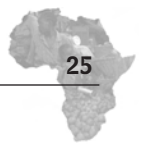
also premised on their households' inability to secure alternative and sustainable livelihood sources and income. Rather than "strategising", the primary goal of these households has been sheer survival.<sup>52</sup>

Other sources of household income include state grants (pensions, child grants and disability grants), informal employment, remittances, borrowing from *mashonisa* (loan sharks), and criminality. The potential of the informal economy – street selling and home-based work – to alleviate income insecurity has been limited. As a result, "food insecurity has become rife in most households. The limited income is often spent on food, and not on health and education. The cost of essential services, especially, makes household income more precarious, exacerbating household income and food insecurity." Responses to reduced income included skipping meals, reducing consumption and simplifying diets.

These two case studies raise a number of questions about household food security and vulnerability in Southern African cities. They suggest, first, that despite widely divergent urban contexts, cash income is critical to household food security. They confirm that households seek to diversify income sources, some of which involve the production and/or sale of food itself. They suggest that food insecurity has gender-specific dimensions. They indicate that food insecurity can reduce social cohesion and increase the pressure on households with more resources. And they suggest that when access to food declines, households modify their food consumption habits. All of these are access-related hypotheses that need to be tested across the Southern African region with much larger and more representative household samples.

When a household is already spending a disproportionate amount of its income on food, inflation and price shocks will have an immediate negative impact on food security. A study conducted in 2002 by the National Labour and Economic Development Institute (NALEDI) in South Africa argues that the increase of basic food prices has a direct impact on food insecurity in many urban South African households.<sup>53</sup> The increases in basic food prices (bread in particular as a marker of this trend) were compounded by fuel hikes and erratic electricity provision.

Although this requires further research, household food insecurity dramatically increased in 2007–08 when the cost of food staples escalated dramatically, worldwide.<sup>54</sup> It continues in the current global financial crisis where rising unemployment is eroding the purchasing power of many households. A recent World Bank study of the impact of rising food prices on poverty levels indicated that in many African countries,



the urban poor are more badly affected than the rural poor.<sup>55</sup> Nearly 90% of the increase in urban poverty due to the global increase in food prices is from already poor households becoming even poorer rather than from households falling into poverty.<sup>56</sup>

The costs to poor urban children can be particularly severe:

As households face shocks to their real income, they eat less and switch from more expensive sources of protein such as fish, meat, and eggs to cheaper coarse cereals. This switch will cause micro-nutrient deficiencies (in iron, iodine and essential vitamins). The poor, moreover, will be forced to cut back on calorie intake, leading to weight loss and acute malnutrition.<sup>57</sup>

A study of urban wage rates and staple food prices in Mozambique, Kenya, Malawi and Zambia showed that the urban food purchasing power had actually improved since the 1990s but that the 2007-8 food crisis halted a long-term improvement.<sup>58</sup> However, as the authors point out, the majority of the urban labour force is employed in the informal sector and consistent time series information on informal wage rates is not available: “the general conclusion of improved staple food purchasing power over the past 15 years may not hold for a significant proportion of the urban labor force.”<sup>59</sup>

In her analysis of the determinants of food security in Kwazulu Natal, Misselhorn identifies “social capital” as a key determinant of food accessibility.<sup>60</sup> This is an important argument since many household-level analyses of food security tend to view the household as a self-contained unit rather than a fluid entity with permeable boundaries situated within complex and shifting webs of local and community social networks. In her case study of 50 households in a poor peri-urban community in the Greater Durban area, she found that a majority of people in the community engaged in some form of household-level agricultural activity (80%) though only 4% sell agricultural produce. Only 46% of adults were in formal employment. Very few households engaged in informal income-generating activities. Nearly 20% of households relied solely on one or more social grants (pensions being the most important).<sup>61</sup> Three forms of social capital were important in the community -- the church, stokvel groups, and social networks -- which people accessed in times of economic shock. All three were “well integrated into the fabric of people’s lives and are drawn on in various ways ... to build livelihoods, wellbeing and food security.”<sup>62</sup> The study argues that social capital institutions and networks can reinforce as well as alleviate food insecurity.<sup>63</sup>

The importance of social grants to household income and food security in this one community raises the more general issue of the relationship between social protection and food security. Over the last decade, “social protection” has moved to the centre of the international development stage. Early scepticism about the affordability and uncertain impacts of social protection programmes have given way to unbridled optimism.<sup>64</sup> Once seen as a minor addendum to the real development business of economic growth and poverty reduction, social protection is now being enthusiastically endorsed and advocated by a wide variety of international actors.<sup>65</sup> As one of the two policy “tracks” in the new international rural food security agenda, the profile of social protection will continue to grow in food security research, policy and planning. While the social protection literature does not usually distinguish between “urban” and “rural” programmes, the level and growth of urbanization in most countries means that by default many programmes have an explicit or implicit urban component or impact on urban populations and thus a potential impact on urban food insecurity.



## 5 VARIABLE FOOD AVAILABILITY AND ACCESS

In 2008-9, AFSUN conducted a food security baseline survey in 11 Southern African cities in 8 SADC countries. As well as providing an overall picture of the extent of urban food insecurity across the region, the survey provided important insights into the sources of food for poor urban households. Just as significant were the variations that emerged between cities. This suggests that general social and economic pressures do not work themselves out in the same way in different geographical localities but are profoundly affected by local demographic, economic, political and spatial realities.

Poor urban households in the cities surveyed obtain their food from a wide variety of sources. The most striking general finding was that 79% of poor households across the region purchase some of their food at supermarkets.<sup>66</sup> This clearly illustrates the extent to which supermarkets have penetrated even the poorer urban communities of the region. Supermarkets were important to more households than the other two major sources of food: the informal sector (used by 70% of households) and small outlets such as corner stores, cafes, restaurants and fast-food outlets (used by 68%). The informal sector is patronised more frequently than supermarkets, however. Nearly a third of the households source food on a daily basis from informal markets and street vendors, followed by small outlets (22% of households each day) while only 5% frequent supermarkets that often. Individual supermarket purchases may be larger (and therefore less frequent) than purchases made from other outlets. On the other hand, many households also obtain food indirectly from supermarkets when informal traders source produce there.

The relative importance of the different food sources varies from city to city. Supermarkets are used by the greatest proportion of households in the large cities of South Africa; over 90% in Johannesburg, Cape Town and Msunduzi (Pietermaritzburg) (Table 7). The figures are similar in cities in those neighbouring countries where South African supermarkets dominate the urban food supply: Gaborone (97%), Windhoek (97%), Manzini (90%) and Maseru (84%). The degree of supermarket penetration and patronage in other countries and cities varies considerably, from 53% of households in Blantyre, 30% in Harare, 23% in Maputo and a low of only 14% in Lusaka.

TABLE 7: Source Used by Households to Obtain Food (%)

	Windhoek	Gaborone	Maseru	Manzini	Maputo	Blantyre	Lusaka	Harare	Cape Town	Msunduzi	Johannesburg	Total
Supermarket	97	97	84	90	23	53	16	30	94	97	96	79
Small shop/restaurant/take away	84	56	89	49	78	69	80	17	75	40	80	68
Informal market/street food	76	29	49	48	98	99	100	98	66	42	85	70
Grow it	3	5	47	10	23	64	3	60	5	30	9	22
Food aid	1	6	3	1	1	2	1	2	3	5	2	2
Remittances (food)	5	4	14	3	12	17	13	19	6	5	2	8
Shared meal with neighbours and/or other households	14	21	20	9	19	23	13	19	45	18	14	21
Food provided by neighbours and/or other households	11	22	29	13	10	18	10	19	34	21	13	20
Community food kitchen	0	0	1	18	0	0	0	3	6	1	9	4
Borrow food from others	12	3	41	18	20	11	8	42	29	24	6	21
Other source	1	5	1	0	0	2	3	6	2	1	0	2

\* Multiple responses; N=6,453

Informal food supply is very important in cities such as Lusaka, Harare, Blantyre and Maputo (where over 95% of poor households obtain food from informal sources). However, its importance varies considerably in South African cities (from a high of 85% in Johannesburg to a low of only 42% in Msunduzi). In Windhoek, around three quarters of households source informal food but only a half do so in Maseru and Manzini. Households in Gaborone are least reliant on the informal sector (at only 29%). The variability is quite striking and cannot easily be explained without more research on the size and nature of the informal sector in each city. Similarly, there are considerable inter-city differences in the importance of small outlets (from a high of 89% in Maseru to a low of only 16% in Harare).

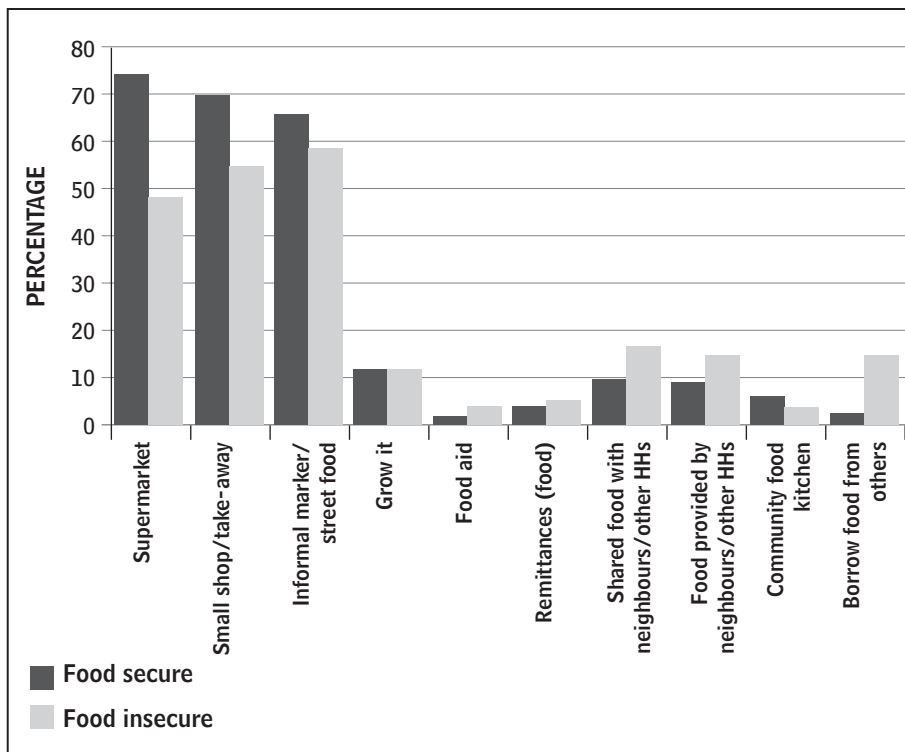
Perhaps the biggest variation between cities is to be found in the importance of urban agriculture as a source of food. In total, 22% of households engage in some urban agriculture. However, in cities such as Blantyre

and Harare, 60% or more poor urban households grow some of their own food. In Maseru, the proportion is nearly a half. However, with the exception of Maputo (at 23%), in most of the other cities 10% or less of households grow food. There are striking differences in the importance of urban agriculture in the three South African cities surveyed (30% in Msunduzi, 9% in Johannesburg and only 5% in Cape Town). The other less important food sources show more consistency from city to city although it is striking how many households in Cape Town rely on sharing meals with other households (44%), obtaining food from neighbours (34%) and borrowing (29%). Only in Harare and Maseru is the borrowing of food more common (41% in both).

Food insecurity is directly related to food sourcing. The more food insecure a household is, the more it relies on the informal sector and the less it patronises supermarkets (Figure 4). Food insecure households also rely more on other sources such as neighbouring households, borrowing food, food remittances and food aid. However, the proportion of households sourcing food in this way is small compared with the three main sources. Little difference emerged in the proportion of food secure and food insecure households growing food for their own consumption.

**FIGURE 4**

Sources of Food for Food Secure and Food Insecure Households



Given these sourcing patterns, a reliable and sufficient income is obviously the key to food security in Southern Africa's urban areas. Households without a regular and reliable income are extremely vulnerable to food insecurity and attendant under-nutrition and negative health impacts. Formal sector unemployment is generally high in many cities of the region. Wages are certainly the most important source of income. However, only 53% of households were receiving income from formal employment at the time of the survey (Table 8). About a quarter were receiving income from casual labour which, by definition, is unreliable and irregular. The other relatively significant sources of income are informal sector employment (received by 15% of households) and social welfare grants (received by 20%). A much smaller number of households receive income from cash remittances (9%), rent (6%), businesses (4%) and gifts (2%). Significantly, very few urban households receive income from the sale of agricultural produce, whether urban (2%) or rural (2%).

As with food sources, the general regional income picture needs to be disaggregated since there is considerable variation from city to city. While half of the households in the overall sample receive income from formal sector employment, the proportion varies from a high of 82% in Windhoek to a low of 39% in Maseru and 38% in Msunduzi. Within South Africa, there is also variation with Johannesburg at 61% and Cape Town at 49%, both higher than Msunduzi. Maputo is surprisingly high (at 66%) but this may be to do with the fact that many households have members working in South Africa. Income from casual work is most important in Maseru (39% of households), Harare and Msunduzi (both 32%) and least important in Johannesburg and Windhoek. Maseru and Msunduzi therefore have the lowest rates of formal wage income and the highest rates of casual work income. This would suggest that food access and reliability are worst in these two cities.

The importance of the informal sector as a source of household income also varies markedly from city to city. As many as 44% of households in Blantyre and as few as 3% in Johannesburg receive income from this sector. In Lusaka and Maputo, around a quarter of households make money from informal activity. In the other cities, the figure is less than 15%. More research is certainly needed to understand the opportunities and obstacles to informal sector participation in different cities. Less than 10% of households in every city except Lusaka derive income from formal sector business which is not surprising given the geographical location and economic profile of each city sample.

Social protection is now commonly advocated as a means of reducing food insecurity by providing poor households with cash or food on

a regular basis. While 20% of households in total receive social grants (primarily in the form of pensions, child support grants and disability allowances), the numbers varied considerably from city to city. When South Africa is removed from the calculation, the figure drops to only 5% which reflects the very limited degree of social protection in other countries included in the survey. In seven of the eleven cities surveyed, less than 10% of poor urban households were in receipt of some form of social grant. In Maseru, where social grants were recently introduced, the number was 13%. In the three South African cities, however, the numbers were much higher: 65% in Msunduzi, 43% in Cape Town and 25% in Johannesburg. South Africa has easily the most developed social protection system in the SADC and the number of households receiving grants has increased every year since 2000.

**TABLE 8: Source of Income (% of Households) 2008**

	Windhoek	Gaborone	Maseru	Manzini	Maputo	Blantyre	Lusaka	Harare	Cape Town	Msunduzi	Johannesburg	Regional Total
Wage work	82	50	39	56	66	53	42	55	49	38	61	53
Casual work	16	23	39	24	14	31	24	32	28	32	11	25
Remittances (money)	15	8	15	7	5	15	16	12	5	3	3	9
Remittances (goods)	2	1	2	1	1	4	3	8	1	1	0	2
Remittances (food)	6	1	6	5	5	13	6	13	3	2	1	5
Rural farm products	2	2	2	3	6	7	1	1	0	0	0	2
Urban farm products	0	0	2	2	5	17	1	2	0	1	0	2
Formal business	2	8	2	5	4	9	18	3	2	0	2	4
Informal business	13	8	14	9	24	44	28	42	6	8	3	15
Rent	2	10	6	6	7	10	14	9	5	3	3	6
Aid (food)	0	4	1	0	0	1	0	1	1	1	0	1
Aid (cash)	0	2	0	1	1	0	1	0	2	1	0	1
Aid (vouchers)	0	1	0	0	1	0	0	0	0	0	1	0
Pension/ disability/ allowance/grant	4	5	13	6	7	2	1	2	42	65	25	20
Gifts	1	5	3	2	1	9	0	1	1	1	0	2
Other sources	0	10	2	2	2	4	0	0	2	4	1	2
N Total HHDS	448	400	802	500	397	432	400	462	1060	556	996	6,453

\*Multiple responses; N=6,453



The final question of relevance is how much of their income poor urban households spend on food purchase. The general rule is that the poorer a household, the greater the proportion of its income that is spent on food. The AFSUN survey confirmed that (a) food purchase is the most important use of income amongst poor urban households in Southern Africa; (b) the proportion of income spent on food is very high (averaging 49% in total) and (c) the poorer the household the greater the proportion of income spent on food (increasing from 44% in the highest tercile to 55% in the lowest) (Table 9).

The survey showed that there was again variation from city to city. With regard to the overall proportion of household income spent on food, for example, the figure ranged from a high of 62% in Harare to a low of 35% in Windhoek. In 6 of the cities, over 50% of household income was spent on food purchase (and these included the three South African cities in the survey). In all of the cities, there was a common pattern of higher proportional expenditure on food by the poorer households, although the difference between the poorest and least poor terciles varied. In Maputo, for example, the difference was minimal (from 53% to 51%). More typical was a significant drop: for example, Msunduzi (58% to 45%), Johannesburg (61% to 42%), Blantyre (57% to 36%) and Windhoek (46% to 24%).

	Total (%)	Lowest Income Tercile (%)	Middle Income Tercile (%)	Highest Income Tercile (%)
Harare	62	66	66	55
Lusaka	55	55	57	52
Cape Town	54	59	55	48
Maputo	52	53	52	51
Msunduzi	52	58	54	45
Johannesburg	50	61	47	42
Blantyre	47	57	47	36
Maseru	46	48	47	44
Gaborone	45	49	49	38
Manzini	44	48	43	42
Windhoek	35	46	36	24
Total	49	55	51	44

*N* = 5,096

## 6 RESEARCH AND POLICY IMPLICATIONS

This paper has addressed two key urban food security questions in Southern Africa: where do the urban poor get their food? And what factors influence urban household food security status? The AFSUN survey reveals overall similarities and some significant differences between cities across the region. Individual city findings will be examined in greater depth in a forthcoming series of city and thematic studies. At the same time, it is important for evidence-based policy-making to highlight the research and information gaps that are revealed both in the literature review and the survey findings. Two issues stand out from this review.

The first is the growing role of the private sector in urban agrifood chains in all Southern African countries. The march of agribusiness and supermarkets in the developing world, and their impact on all aspects of food security in cities, have been examined in considerable depth elsewhere.<sup>67</sup> In Southern Africa, however, the research literature is still very much in its infancy.<sup>68</sup> Nor is it likely to be furthered by the current global food security agenda with its focus on increasing smallholder production and assuming the market will take care of the rest. In all of the money now being thrown at “food security research” by international organizations and national governments, it is worth asking how much is being devoted to understanding one of the central drivers of change (agrifood supply chains) and what role they play and could play in the alleviation of urban food insecurity? At present, most of the discussion on private sector involvement seems to focus on the sector as a provider of inputs to small farmers.<sup>69</sup> This is clearly a myopic view which diverts attention away from what is actually happening on the ground.

Recently there have been signs of a new global recognition of the reality of agribusiness involvement (and potential) in the African food sector. However, most of the initiatives to date are advocacy-driven and production-oriented, designed primarily to build public-private partnerships between donors, governments and agribusiness. An FAO-sponsored workshop in Accra, Ghana, in October 2007, for example, focused primarily on creating an enabling policy environment for agribusiness and agro-industry development in Africa.<sup>70</sup> This environment includes “macroeconomic and political stability, efficient land markets and tenure systems, consistent open trade policies, rural and agricultural service delivery, availability of human resources, well functioning public-private partnerships, good governance, and the availability of improved

technologies.” In 2007, the Agro-Business Forum was convened in Rome and is now an annual event where international organizations, national governments and private sector companies meet to compare notes.<sup>71</sup> Food security, it seems, has become a “business opportunity.”

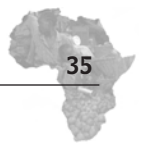
In March 2010, a number of international organizations launched the African Agribusiness and Agro-Industries Development Initiative (or 3ADI). The major objective of 3ADI is “to increase private sector investment flows into the agriculture sector in Africa by mobilizing resources for agribusiness and agro-industrial development” from domestic and international financial systems. By 2020, 3ADI aims to have an agriculture sector in Africa “made up of highly productive and profitable agriculture value chains.” A Pan African Agribusiness Consortium has also been established to promote financing opportunities for agribusiness in Africa.<sup>72</sup>

## FIGURE 5

Advertisement for 2010 Agribusiness Forum



The implications of these agribusiness and donor initiatives for the food security of the rural and urban poor require much further independent research. UN Special Rapporteur on the Right to Food, Olivier De Schutter, has recently cautioned that “the sourcing, pricing, and wage policies of commodity buyers, food processors and retailers have a huge and sometimes negative impact on the right to food.”<sup>73</sup> De Schutter focuses primarily on the implications of the “deeply unequal bargaining positions of food producers and consumers on the one hand, and buyers and retailers on the other” for agricultural workers and small farmers.<sup>74</sup>



For want of space, he leaves out any discussion of the environmental and nutritional dimensions of the practices of agribusiness corporations and the impact of pricing policies on consumers, promising to return to these issues in future reports. This is a welcome assurance since these are the kinds of issues that are central to understanding the implications of agribusiness and supermarketization for urban food security.<sup>75</sup>

In the Southern African context a policy-oriented research agenda on agribusiness and urban food security would need to consider the following issues:

- the structure, role, functioning and ownership of food value chains from “farm to fork” (or hand), building on the work of the Regoverning Markets Project and various individual researchers;<sup>76</sup>
- the opportunities and potential for urban food producers to derive income through integration into formal food supply chains;<sup>77</sup>
- the rapid progress and implications of supermarket growth in Southern African countries;<sup>78</sup>
- the spatial organization and accessibility of formal sector outlets (supermarkets, fast foods) in the urban environment. The poorer neighbourhoods of cities are often referred to as “food deserts” for the lack of access to food, although this argument needs further testing;
- the determinants of pricing of fresh and processed food products in modern value chains since the cost of purchased food is a critical determinant of food accessibility for the urban poor;
- the impact of supermarkets on nutrition, urban diets and food preferences. Evidence from other developing country contexts, for example, has attributed the growth of overnutrition (obesity) to changing food preferences and consumption patterns;<sup>79</sup>
- impact of supermarkets on the other potential food sources for the poor, particularly small stores and the informal sector;
- the role of private-sector corporate social responsibility programmes (food banks, food kitchens, school feeding programmes etc) in improving food access for food insecure households.

In a market-driven, neoliberal world the policy implications of agribusiness penetration, competition and control for the urban poor are not immediately obvious. A number of writers have tried, however, to suggest some of the programmatic policy implications of the supermarket revolution.<sup>80</sup> Timmer, for example, notes that there has been a shift from a food policy paradigm focused on links between poverty and food security to one focused on the “double burden” of undernutrition and overnutrition. In general:

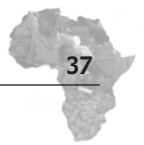
Food policy analysis is designed to illuminate welfare trade-offs as producers, traders, and consumers are buffeted by changes in technology, prices, and tastes. These changes can come at the household, sectoral, macro, and global levels, and supermarkets in developing countries are affecting all four.<sup>81</sup>

He argues that at the national level, the “old” policy analysis agenda focused on food price stability, market supplies and inventory behaviour at the “macro” level and food access and entitlements at the “micro” level. Policy interventions focused on price controls and stabilization to balance the interests of consumers and producers and how to ensure access to food in relation to income and price variables. These issues are still highly relevant in Southern African countries, particularly where market production of staples by small farmers is still important.<sup>82</sup> The “new” policy agenda focuses more on how to influence the behaviour of supermarkets with a focus on the interests of small farmers and small-scale food wholesale and retail facilities, and less on consumer interests:

The drivers of change may now be multinational corporations rather than domestic marketing boards, the policy levers may be nutritional education and emphasis on activity levels in schools to prevent childhood obesity, and agricultural choices may be more influenced by quality standards and relationships with procurement officers than price policies and extension agents.<sup>83</sup>

Supermarketization brings new research and policy challenges but, as subsequent papers in this series will show, it by no means exhausts the complex range of policy issues that need to be considered in the area of urban food security.

The second major policy and research issue that arises from this paper on supply and access is the role of the informal sector or second economy in the food security of the urban poor. As Skinner notes: “While national data on street vending is scarce, city level statistics are even rarer.”<sup>84</sup> The problem goes deeper than a lack of statistical information. The current international concern with food security ignores the urban informal sector because it ignores the urban. Yet in the large literature on the urban informal sector in Southern Africa, there is little systematic examination or current analysis of the role of informal food traders and vendors in urban food security.<sup>85</sup> In the urban areas of Southern Africa, a detailed inventory of the informal food provisioning sector therefore needs to be compiled. The inventory needs to be as comprehensive as possible for each city. A city-wide mapping of the locations and spatial behaviour of these food outlets would be extremely helpful. Within each grouping,



there are many different kinds of operation, distinguishable by size, ownership, clientele, produce, gender and nationality of the owner or operator. An inventory of the types of operation would therefore provide valuable information about the organization and role of the sector.

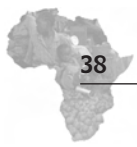
Key research questions that follow from the mapping would include the following:

- the structure, role, functioning and market strategies of informal sector suppliers of fresh, processed and cooked food in the urban environment;
- the role of the informal sector in income generation and food security of participating households, women and children;
- the patronage patterns of poor urban households and the pricing practices of informal suppliers and whether these advantage the former;
- the organization and role of informal cross-border food trading in the food security of urban households in destination countries;
- the dietary implications of reliance on informal suppliers and the safety of street foods.
- the implications of supermarket expansion for the operations of informal sector suppliers in urban areas.

Although informality is, indeed, the “main game in town”, there is a strong sense that governments do not want to play. Skinner, for example, notes that African “state responses to street trading form a continuum from violent sustained evictions on the one side, to a more inclusive approach on the other.”<sup>86</sup> At the same time, “ongoing and low level harassment of informal traders is pervasive across African cities.”<sup>87</sup> Ray Bromley, who has been studying the informal sector since the 1970s, notes that the problem is global in scope: “Official responses are diverse, spasmodic, and often contradictory, and their effectiveness is severely constrained by the highly-visible and constantly fluctuating nature of the population involved, and by the operational limitations of a street-level bureaucracy. Policy interventions often have unforeseen consequences, and are rarely implemented consistently.”<sup>88</sup>

Skinner suggests a number of immediate policy interventions and priorities:

- The contribution that street traders make to the economies of cities and the food security needs of the poor need to be better understood and internalised by urban policy-makers.
- Those cases where cities have included street traders in urban plans, creatively resolved conflicts between different users of public space and developed approaches that have resulted in improved street trader



management need to be documented.

- At the national scale, street trading needs to be seen more as an economic development concern than an urban management issue.
- National governments are critical role players and need to develop strategies for the inclusion of street traders in economic development and food security strategies.

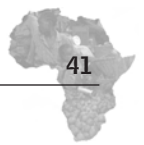
This is not a call for unregulated street trading but for an inclusive approach that acknowledges the informal sector as a critical player in the food security of the urban poor. As a pathway to food security, it needs to be regulated and encouraged, not harassed and demonised.

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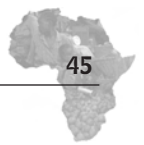
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## PATHWAYS TO INSECURITY: FOOD SUPPLY AND ACCESS IN SOUTHERN AFRICAN CITIES

As in many parts of the world, supermarket expansion and control of food supply chains is having a major impact on the quality, quantity and price of food available to urban residents. Growing numbers of poor households in Southern African cities now obtain their food, directly or indirectly, from supermarkets. In most cities, these same households spend over 40 percent of household income on food. Supermarket expansion is also having a major impact on the informal sector. This paper reviews the changing nature of the urban food supply in Southern African cities, the role of supermarkets and the informal sector in food accessibility and the implications for the food security of the urban poor.



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