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*Supermarket Expansion and the Informal Food Economy in Southern African Cities: Implications for Urban Food Security**

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The new international food security agenda proposes small farmer production as the solution to growing food insecurity in Africa. A striking omission in this agenda is any consideration of the dimensions and determinants of urban food security. In Southern African towns and cities, lack of access to food is key to the food insecurity of poor urban households. This article reviews the current state of knowledge about the food sources of such households, paying particular attention to the expansion of supermarket supply chains, their impact on informal food suppliers and the relative insignificance of urban agriculture. The article also presents and analyses the significance of findings from a recent eleven-city survey of food insecurity in Southern Africa conducted by the African Food Security Urban Network (AFSUN).

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.¹ This agenda has had very little to say about the food insecurity of urban populations.² In urban areas, the main characteristic of food insecurity is not food production but access to food. Accessibility hinges primarily on the individual or household's ability to purchase foodstuffs, which in turn depends on household income, the price of food and the location of food outlets.³ Food may be

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1 A. Mwaniki, 'Achieving Food Security in Africa: Challenges and Issues' (Office of the Special Adviser on Africa, United Nations, New York, 2006); X. Diao, D. Headey and M. Johnson, 'Toward a Green Revolution in Africa: What Would It Achieve, and What Would It Require?', *Agricultural Economics*, 39 (2008), pp. 539–50; Alliance for a Green Revolution In Africa (AGRA), available at <http://www.agra-alliance.org/>, retrieved on 20 April 2010.

2 J. Crush and B. Frayne, *The Invisible Crisis: Urban Food Insecurity in Southern Africa*, Urban Food Security Series No. 1 (Cape Town and Kingston, AFSUN, 2010), available at <http://www.afsun.org>.

3 G. Kennedy, 'Food Security in the Context of Urban Sub-Saharan Africa', Paper for FoodAfrica Internet Forum, available at <http://foodafrica.nri.org/security/securitypapers.html>, retrieved on 20 April 2010.

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). 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'.⁴ The absence of a sustained or reliable income source constitutes the major obstacle to food access by the urban poor in Southern Africa.

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'.⁵ Over the last two decades, agribusiness has been transforming the nature and organisation of urban food provisioning across the developing world.⁶ Central to this process is what is often referred to as the 'supermarket revolution'.⁷ Supermarkets were once thought to be the preserve of middle and upper income consumers and hence confined to servicing a small urban élite. However, supermarkets themselves have seized the opportunity presented by rapid urbanisation and mass markets and are now aggressively targeting all urban consumers. In Southern Africa, the process is coordinated and driven by a small number of large and highly competitive corporations, including Pick n Pay, Shoprite, Woolworths and Spar. The entry of American retail giant, Walmart, into the African market through its acquisition of South African retailer Massmart will accelerate the process dramatically. Since supermarkets and modern supply chains are poised to play an increasingly important role in urban food provisioning in Southern Africa, it is important to understand better their operation and impact on informal food retailers and on urban food security more generally.

The informal food economy plays an essential role in the provisioning of urban households and in making food available to the urban poor. For Kessides, informality is 'the main game in town'.⁸ The informal marketing system includes informal markets, street traders, food vendors and spazas (informal shops). Much of the existing literature on the informal economy focuses on issues such as its role in employment generation; its social,

4 L. Mougeot, 'For Self-Reliant Cities: Urban Food Production in a Globalizing South', in M. Koc, R. MacRae, L. Mougeot and J. Welsh (eds), *For Hunger-Proof Cities: Sustainable Urban Food Systems* (Ottawa, IDRC, 1999), p. 14.

5 A. Louw, D. Chikazunga, L. Ndanga, E. Biénabe and D. Jordaan, 'Improved Small-Scale Farmer Access to Fresh Produce Agri-Food Markets in South Africa', *Regoverning Markets Policy Brief* (Pretoria, University of Pretoria, 2008).

6 T. Weis, *The Global Food Economy: The Battle for the Future of Farming* (London, Zed Books, 2007); D. Burch and G. Lawrence (eds), *Supermarkets and Agri-Food Supply Chains: Transformations in the Production and Consumption of Foods* (London, Edward Elgar, 2007); E. McCullough, P. Pingali and K. Stamoulis, *The Transformation of Agri-Food Systems Globalization, Supply Chains and Smallholder Farmers* (London, Earthscan, 2008).

7 E. Farina, 'Consolidation, Multinationalisation and Competition in Brazil: Impacts on Horticulture and Dairy Production Systems', *Development Policy Review*, 20, 4 (2002), pp. 441–57; T. Reardon and J. Berdegue, 'The Rapid Rise of Supermarkets in Latin America: Challenges and Opportunities for Development', *Development Policy Review*, 20, 4 (2002), pp. 371–88; S. Paiguenaum, J. Berdegue and T. Reardon, 'The Rapid Rise of Supermarkets in Chile: Effects on Dairy, Vegetable and Beef Chains', *Development Policy Review*, 20, 4 (2002), pp. 459–71; D. Weatherspoon and T. Reardon, 'The Rise of Supermarkets in Africa: Implications for Agrifood Systems and the Rural Poor', *Development Policy Review*, 21, 3 (2003), pp. 333–55; T. Reardon, S. Henson and J. Berdegue, "'Proactive Fast-Tracking" Diffusion of Supermarkets in Developing Countries: Implications for Market Institutions and Trade', *Journal of Economic Geography*, 7, 4 (2007), pp. 399–431.

8 C. Kessides, 'The Urban Transition in Sub-Saharan Africa: Implications for Economic Growth and Poverty Reduction', *Africa Region Working Paper Series No. 97* (Washington, World Bank, 2005).

spatial and gender characteristics; and the highly ambivalent response of municipal authorities and planners to informality.⁹ These are all important issues for urban food security since the informal economy is an important income source for many urban households. Equally important, is the role played by the informal food economy in the food sourcing strategies of poor urban households.

While the formal–informal distinction is a useful starting point, there are many points of intersection between the two. Informal marketing systems, for example, source many of their processed and fresh food products from supermarkets and other formal sector retailers and wholesalers. Or again, formal sector supermarket expansion can impact upon the operations and profitability of small-scale informal food vendors, as well as locally-owned independent supermarkets and grocery stores.¹⁰ Kennedy, Nantel and Shetty argue, for example, that ‘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’.¹¹ Consumption patterns are becoming more universalised even as poorer socio-economic groups ‘drift towards poor-quality, energy-dense but cheap and affordable foods’.¹²

When the contemporary international food security agenda occasionally turns to urban areas, it misleadingly equates food security with urban food production.¹³ In the 1990s, there was a great deal of optimism that ‘urban agriculture’ was the solution to the food security needs of the urban poor in Africa. This led to a series of research and policy programmes and publications with optimistic titles such as ‘cities of farmers’, ‘cities feeding people’, ‘hunger-proof cities’, ‘growing cities, growing food’, ‘cities farming for the future’, ‘agropolis’ and ‘growing better cities’.¹⁴ Faith in urban agriculture still persists, although its limitations have come under increasing critical scrutiny in recent years.¹⁵

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- 9 E. Preston-Whyte and C. Rogerson (eds), *South Africa's Informal Economy* (Cape Town, Oxford University Press, 1991); K. Tranberg Hansen and V. Mariken (eds), *Reconsidering Informality: Perspectives from Urban Africa* (Uppsala, Nordiska Afrikainstitutet, 2002); A. Brown (ed.), *Contested Space: Street Trading, Public Space, and Livelihoods in Developing Cities* (London, ITDG Publishing, 2006); J. Heintz and D. Posel, ‘Revisiting Informal Employment and Segmentation in the South Africa Labour Market’, *South African Journal of Economics*, 76, 1 (2008), pp. 26–44.
- 10 D. Potts, ‘The Urban Informal Sector in Sub-Saharan Africa: From Bad to Good (and Back Again?)’, *Development Southern Africa*, 25, 2 (2008), pp. 151–67.
- 11 G. Kennedy, G. Nantel and P. Shetty, ‘Globalization of Food Systems in Developing Countries: A Synthesis of Country Case Studies’, in ‘Globalization of Food Systems in Developing Countries’, Food and Nutrition Paper 83 (Rome, Food and Agriculture Organisation of the United Nations (FAO), 2004), p. 1.
- 12 Kennedy, Nantel and Shetty, ‘Globalization of Food Systems in Developing Countries’; J. Crush, B. Frayne and M. McLachlan, *Rapid Urbanization and the Nutrition Transition in Southern African Cities*, Urban Food Security Series No. 7 (Cape Town and Kingston, AFSUN, 2011), available at <http://www.afsun.org>
- 13 FAO International Symposium on Urban and Peri-Urban Horticulture in the Century of Cities: Lessons, Challenges, Opportunities, Dakar, Republic of Senegal, 6–9 December 2010, available at <http://www.fao.org/ag/agp/greenercities/en/events/>, retrieved on 15 December 2010; A. Zezza and L. Tasciotti, ‘Urban Agriculture, Poverty, and Food Security: Empirical Evidence from a Sample of Developing Countries’, *Food Policy*, 35, 4 (2010), pp. 265–76.
- 14 D. Freeman, *A City of Farmers: Informal Urban Agriculture in the Open Spaces of Nairobi, Kenya* (Kingston and Montreal, McGill-Queen's University Press, 1991); A. Egziabher, D. Lee-Smith, D. Maxwell, P. Memon, L. Mougeot and C. Sawio (eds), *Cities Feeding People: An Examination of Urban Agriculture in East Africa* (Ottawa, IDRC, 1994); M. Koc, R. MacRae, L. Mougeot, and J. Welsh (eds), *For Hunger-Proof Cities: Sustainable Urban Food Systems* (Ottawa, IDRC, 1999); N. Bakker, M. Dubbeling, S. Gündel, U. Sabel-Koschella and H. Zeeuw (eds), *Growing Cities, Growing Food: Urban Agriculture on the Policy Agenda* (Feldafing, RUAF, 2000); L. Mougeot (ed.), *Agropolis: The Social, Political, and Environmental Dimensions of Urban Agriculture* (Ottawa and London, IDRC and Earthscan, 2006); L. Mougeot (ed.), *Growing Better Cities: Urban Agriculture for Sustainable Development* (Ottawa, IDRC, 2006); R. van Veenhuizen (ed.), *Cities Farming for the Future: Urban Agriculture for Green and Productive Cities* (Ottawa, IDRC, 2006).
- 15 See J. Crush, A. Hovorka and D. Tevera, ‘Food Security in Southern African Cities: The Place of Urban Agriculture’, *Progress in Development Studies*, 11, 4 (2011), pp. 285–305.

This article focuses on the question of urban food supply and access in Southern Africa's rapidly growing cities, paying particular attention to the relationship between supermarket expansion and the informal food economy. First, it reviews the current state of knowledge about the process of supermarket growth across the Southern African region and down the food supply chain. Then it examines the contradictory evidence about the impact of the rise of supermarkets on the informal food economy. The article then presents and discusses the results of a recent food insecurity survey among poor households conducted by the African Food Security Urban Network (AFSUN). The survey sought to assess the current importance of various food sources (including supermarkets, the informal economy and urban agriculture) in eleven different cities across the SADC region. Finally, the article discusses some of the research and policy implications of these findings.

Agri-Food Supply Chains and Supermarket Expansion

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'.¹⁶ Some food companies 'help communities meet their basic need for food in times of famine'. Others go even 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.¹⁷

While most urban households only interact with the agri-food supply chain at the point of food purchase, the major retailers are only the public face of an increasingly integrated chain of production, transportation, packing, processing, distribution, wholesaling and retailing. The Regoverning Markets Project at the University of Pretoria has recently documented in some detail the rapid transformation in the South African food sector over the last decade.¹⁸ The process is characterised by consolidation and corporate concentration, buyer-driven control over all aspects of the agri-food supply chain from production to consumption, and the development of new JIT (just-in-time) sourcing, procurement and distribution strategies.¹⁹

The food sector in urban (and rural) South Africa is increasingly dominated by a small number of major supermarket groups. In 2007, the top four supermarket chains in South Africa (trading under ten different store names) had sales of over USD\$17 billion and a market share of over 70 per cent of the formal food and groceries retail market (Table 1).²⁰ Shoprite Holdings Ltd is the largest and most aggressively expansionist of these companies, starting operations in 1979 with the acquisition of eight Cape-based supermarkets and expanding rapidly outside South Africa after 1990. The corporation now has supermarkets in most SADC countries and as far away as Nigeria and Ghana. By 2003, Shoprite had over 600

16 A. Mwaniki, 'Food Security in Africa: One Company's Role', available at <http://www.gvsu.edu/cms3/assets/0B4E40FA-03CD-1029-5219639A55372427/Food%20Security%20-%20Mwaniki.docx>, retrieved on 20 April 2010.

17 D. Fig, 'Food and Drink Industries', in D. Fig (ed.), *Staking Their Claims: Corporate Social and Environmental Responsibility in South Africa* (Pietermaritzburg, University of Natal Press, 2007).

18 See http://www.regoverningmarkets.org/en/southern_africa, retrieved on 31 March 2010.

19 C. Mather and B. Kenny, 'The Difficulties of "Emerging Markets": Cross-Continental Investment in the South African Dairy Sector', in N. Fold and B. Pritchard (eds), *Cross-Continental Food Chains* (London, Routledge, 2005), pp. 179–90; R. Emongor, 'The Impact of South African Supermarkets on Agricultural and Industrial Development in the Southern African Development Community' (Ph.D. thesis, University of Pretoria, 2008), pp. 40–79.

20 Emongor, 'The Impact of South African Supermarkets', p. 44.

Table 1. Major supermarket chains, South Africa, 2005.

	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: A. Louw, H. Madevu, D. Jordaan and H. Vermeulen, 'South Africa', in W. Vorley, A. Fearn and D. Ray (eds), *Regoverning Markets: A Place for Small-Scale Producers in Modern Agrifood Chains?* (Aldershot, Gower, 2007), pp. 73–82.

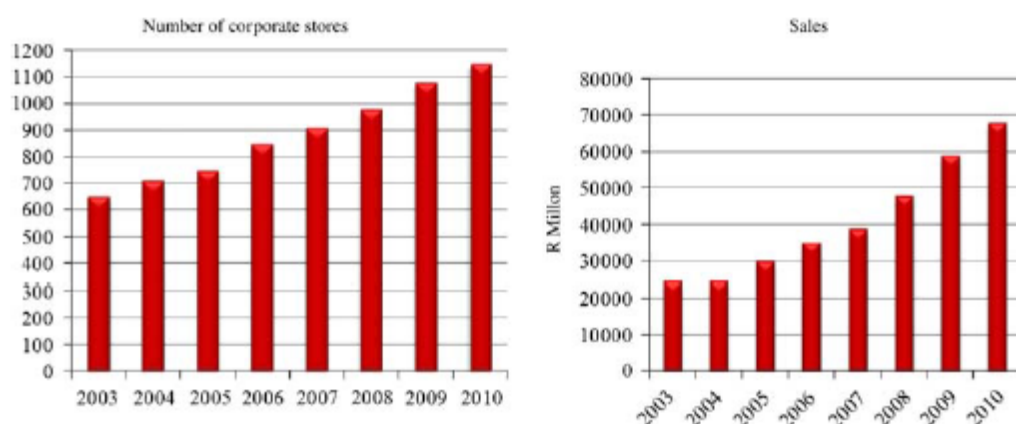


Figure 1. Expansion of Shoprite Holdings, 2003–2010. Source: Shoprite Holdings, 'Gearing for Growth', p. 3.

stores and R25 billion in annual sales. In the period from 2003 to 2010, it almost doubled its number of stores (to 1,150) and tripled its sales to R67 billion (Figure 1). Another (newer) South African company enjoying spectacular growth is Fruit & Veg City (FVC) which opened its first outlet in Kenilworth, Cape Town, in 1993.²¹ FVC now owns over 100 stores in South Africa, Namibia and Lesotho and is also a significant exporter and importer of fresh produce from global markets.

Proponents of supermarket expansion argue that the greater purchasing power of supermarkets and their economies of scale benefit the urban poor because of lower prices, and the rural poor through smallholder farmers who have a new and ready market for their produce.²² In South Africa, however, the major producers of foodstuffs for urban markets are large, privately-owned commercial farms and agribusiness estates and plantations.²³ The opportunities for small-scale farmers, including urban producers, to break into this highly centralised system of corporate control are extremely limited:

21 See <http://www.fruitandvegcity.co.za/>, retrieved on 15 May 2011.

22 C. da Silva, D. Baker, A. Shepherd, S. da Cruz, and C. Jenaneb (eds), *Agro-Industries for Development* (Rome, FAO, 2009).

23 A. Louw, H. Madevu, D. Jordaan and H. Vermeulen, 'South Africa', in W. Vorley, A. Fearn and D. Ray (eds), *Regoverning Markets: A Place for Small-Scale Producers in Modern Agrifood Chains?* (Aldershot, Gower, 2007), pp. 73–82.

Table 2. Income sources of small farmer households in South Africa, 2006.

Major 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: N. Vink and J. Van Rooyen, 'The Economic Performance of Agriculture in South Africa Since 1994: Implications for Food Security', Development Planning Division Working Paper Series 17 (Midrand, Development Bank of Southern Africa, 2009), p. 13.

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.²⁴

An estimated 1.3 million households in rural South Africa have access to land for farming (a number that declined by over 20 per cent between 2002 and 2006).²⁵ 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 per cent) recorded sales of farm produce as their primary source of income. Far more important were social grants (the most important income source for 50 per cent of these rural households), wage employment (23 per cent) and remittances (19 per cent) (Table 2). The opportunities for some small farmers to access modern agri-food supply chains appear to be a little brighter in other Southern African countries although their longer-term prospects are very uncertain.²⁶

Modern agri-food supply chains are increasingly buyer-driven through contractual agreements between agents in the chain: 'supermarkets now source large volumes of processed (and fresh) food products from a limited number of preferred suppliers'.²⁷ Most supermarket groups have their own buyer-driven procurement and distribution arms for fresh and processed food. Shoprite's Freshmark, for example, is the group's fruit and vegetable procurement company, supplying fresh produce to over 400 Shoprite, Checkers, U Save and Sentra outlets within South Africa, and to most of its 108 supermarkets in fifteen other African countries.²⁸ Freshmark operates its own network of distribution centres and refrigerated trucks and negotiates production contracts with some 500 farmers. Shoprite's supply-chain management

24 Louw, Madevu, Jordaan and Vermeulen, 'South Africa', p. 75; A. Louw, H. Vermeulen, J. Kirsten and H. Madevu, 'Securing Small Farmer Participation in Supermarket Supply Chains in South Africa', *Development Southern Africa*, 24, 4 (2007), pp. 539–51; A. Louw, L. Ndanga, D. Chikazunga and J. Jagwe, 'Restructuring Food Markets in the Southern African Region: Dynamics in the Context of the Fresh Produce Sub-Sector: Regional Synthesis', Report for Regoverning Markets Project (Pretoria, University of Pretoria, 2008).

25 N. Vink and J. Van Rooyen, 'The Economic Performance of Agriculture in South Africa Since 1994: Implications for Food Security', Development Planning Division Working Paper Series 17 (Midrand, Development Bank of Southern Africa, 2009), p. 13.

26 R. Emongor and J. Kirsten, 'The Impact of South African Supermarkets on Agricultural Development in the SADC: A Case Study in Zambia, Namibia and Botswana', *Agrekon*, 48, 1 (2009), pp. 60–84.

27 C. Mather, 'SMEs in South Africa's Food Processing Complex: Development Prospects, Constraints and Opportunities', Working Paper No. 3, Trade and Industrial Policy Strategies (TIPS), Pretoria, 2005, p. 2.

28 Shoprite Holdings, 'Geared for Growth: Annual Report 2010', available at http://www.shopriteholdings.co.za/files/1019812640/Investor_Centre_Files/Annual_Reports/Annual-Report-2010/2010_ShopriteAR_Eng.pdf, retrieved on 15 May 2011.

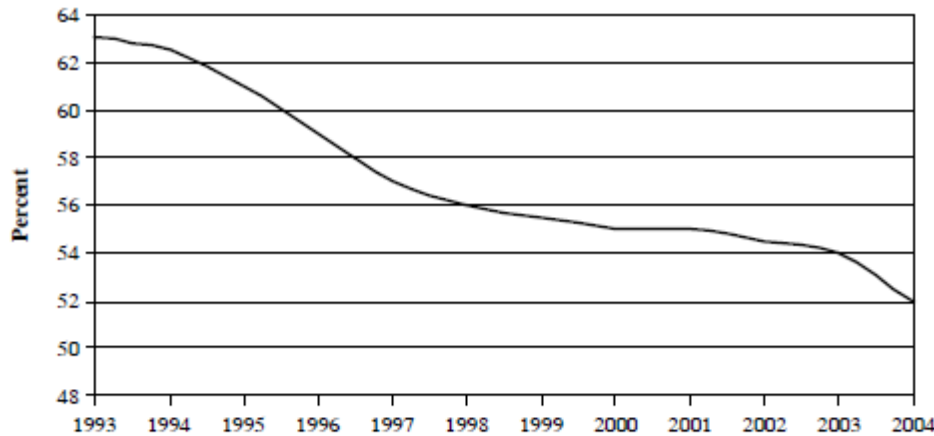


Figure 2. Fresh Produce Market (FPM) Share of National Market, 1993–2004*. *Source:* A. Louw, L. Ndanga, D. Chikazunga and J. Jagwe, 'Restructuring Food Markets in the Southern African Region: Dynamics in the Context of the Fresh Produce Sub-Sector: Regional Synthesis', Report for Regoverning Markets Project (Pretoria, University of Pretoria, 2008), p. 22.

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

infrastructure also electronically integrates the group's 1,166 stores in 16 countries into a central database and just-in-time replenishment system.

In the food processing industry, small-scale processors are being squeezed out of retail supply chains. Food processing is dominated by a small number of firms (5 per cent of the firms produce 75 per cent of the output), although the degree of concentration varies by sector. In the dairy products sector, for example, the top four processing companies control over 80 per cent of sales. In fruit and vegetable canning and grain mill products, however, these companies only control 35 per cent.²⁹ The overall trend in all sectors, though, is towards greater corporate concentration.

Urban wholesaling of fresh fruit and vegetables in South Africa was once the primary domain of municipal Fresh Produce Markets (FPMs) but these are declining in importance as supermarkets turn to 'category manager' companies and affiliates for the procurement of produce under direct contracts with farmers (Figure 2).³⁰ The FPMs are now patronised more by smaller grocers, restaurants and informal food economy distributors and sellers. In Johannesburg, for example, one taxi firm uses its taxis to ferry produce from the Joburg Market in City Deep to its fleet of women street vendors in Soweto before going on to pick up the first of the early-morning commuters.³¹

South Africa might be viewed as an exception in the SADC region in terms of the central role of modern food supply chains in provisioning the cities. On the other hand, it might be argued that South African cities are simply further along a path that others 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 (see Table 3). Shoprite now operates in twelve SADC countries (including South Africa), Woolworths in nine, Spar in six and Pick n Pay in five.

Metro Cash and Carry South Africa (or Metcash) operates a network of over 950 'cash and carry' supermarkets and neighbourhood stores in nine African countries. Its largest

²⁹ *Ibid.*, p. 7.

³⁰ See <http://www.joburgmarket.co.za/>, retrieved on 15 May 2011.

³¹ Interview, Joburg Produce Market, April 2011.

Table 3. South African supermarket chains in SADC, 2007.

Company and Number of Outlets				
Country	Shoprite	Pick n Pay	Spar	Woolworths
South Africa	718	552	675	320
Angola	8			
Botswana	10	19	26	11
Lesotho	7			2
Malawi	5			
Mauritius	1		11	
Mozambique	5			1
Namibia	65	15	19	4
Swaziland	7	6	7	3
Tanzania	5			1
Zambia	18		2	1
Zimbabwe	1	56		2
Total	850	648	740	345

Source: R. Emongor, 'The Impact of South African Supermarkets on Agricultural and Industrial Development in the Southern African Development Community' (PhD thesis, University of Pretoria, 2008), pp. 40–79.

presence is in Malawi (115 outlets) and Zimbabwe (42 outlets). Metcash also provides products for many local independently-owned supermarkets, shops and vendors.

Massmart (in which Walmart has acquired a controlling share) is South Africa's sixth-largest retail company and operates in seven Southern African countries. The market share of the South African supermarket chains is growing in each country in which they operate. The bulk of their processed products and fresh produce are currently sourced cross-border from South Africa. Shoprite has 21 stores in Namibia and sources 50 per cent of its inventory from South Africa. Angola's four Shoprite stores source 99 per cent of their fresh fruit and vegetables from South Africa. Pick n Pay sources 70 per cent of its produce from South Africa. Information on the impact of supermarket expansion on urban food security in the SADC region is surprisingly sparse. Most of the existing literature focuses on the implications of supermarket expansion for small farm producers, a common theme globally.³² The one major study of the impact of supermarkets on the food security of the poor was actually conducted in rural villages in the Eastern Cape.³³ The study did have the virtue of demonstrating how important supermarkets have become even to rural South Africans.

Urban Zambia is proving to be an important test laboratory in the SADC for understanding the conflicts surrounding supermarket growth and the penetration of modern food supply chains.³⁴ Shoprite's expansion into Zambia began in 1995 as part of a privatisation deal with government. In 1996, the first retail store opened in Lusaka. Further

32 T. Reardon, C. Barrett, J. Berdegue and J. Swinnen, 'Agrifood Industry Transformation and Small Farmers in Developing Countries', *World Development*, 37, 11 (2009), pp. 1,717–27.

33 M. D'Haese and G. Van Huylenbroeck, 'The Rise of Supermarkets and Changing Expenditure Patterns of Poor Rural Households: Case Study in the Transkei Area, South Africa', *Food Policy*, 30, 1 (2005), pp. 97–113.

34 H. Haantuba and J. de Graaf, 'Linkages Between Smallholder Farmers and Supermarkets: Lessons from Zambia', in E. McCullough, P. Pingali and K. Stamoulis (eds), *The Transformation of Agriculture – Food Systems: Globalization, Supply Chains and Smallholder Farmers* (London, Earthscan, 2008), pp. 207–23; D. Miller, "Retail Renaissance" or Company Rhetoric: The Failed Partnership of a South African Corporation and Local Suppliers in Zambia', *Labour, Capital and Society*, 41, 1 (2008), pp. 35–55; D. Miller, 'Food Frontiers in Zambia: Resistance and Partnership in Shoprite's Retail Empire', *At Issue Ezine*, 8, 3 (July 2008), available at <http://www.africafiles.org/atissueezine.asp?issue=issue8#art4>, retrieved on 30 November 2009; C. Abrahams, 'Transforming the Region: Supermarkets and the Local Food Economy', *African Affairs*, 109, 434 (2010), pp. 115–34; D. Miller, E. Nel and G. Hampwaye, 'Malls in Zambia: Racialised Retail Expansion and South African Foreign Investors in Zambia', *African Sociological Review*, 12, 1 (2008), pp. 35–54.

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 eighteen retail supermarkets and seven Hungry Lion (fast food) outlets. Freshmark operates depots for Shoprite in Lusaka and Kitwe. With 39 per cent of the domestic retail market, Shoprite is the largest retailer in Zambia.

Shoprite's stated policy is to establish and support local supply chains. In practice, its highly centralised form of regional procurement and distribution works against extensive local procurement.³⁵ Shoprite sources most of its processed products from South Africa although fresh produce is obtained locally.³⁶ Up to 80 per cent of fresh fruit and vegetables are now procured locally by Shoprite's Freshmark. However, 90 per cent of this is from large-scale farms.³⁷ The opportunities for small farmers to enter the supply chain are limited. In the dairy industry, increasingly dominated by a South African-based subsidiary of Italian Parmalat, there are more opportunities for local suppliers.³⁸ However, 70 per cent of raw milk is still received from large commercial farmers.

Emongor concludes that 'supermarkets are not yet very important in the marketing of fresh agricultural products in Zambia compared to other local products', but implies that their power and reach are likely to grow rapidly in the future.³⁹ Abrahams is more sceptical, suggesting that 'supermarket revolution myopia' overstates the impact of supermarkets in Zambia, while admitting that the extent to which they have or will transform the SADC region 'can only be accurately undertaken when urban food mechanisms, and local agency, are made visible'.⁴⁰ Miller concludes that the impact of supermarkets is complex and contradictory:

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.⁴¹

A 2007 to 2008 Urban Consumption Survey in four Zambian cities (Lusaka, Kitwe, Mansa and Kasama) provides some general insights into changing urban diets and the broader significance of supermarkets to urban consumers.⁴² The survey found 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 per cent of the total value of staple purchases by urban households and (d) supermarkets had five to 17 per cent of the total value of staple purchases by urban households. In Lusaka, the poorest consumption quintile sourced only 1.2 per cent

35 R. Emongor, A. Louw and J. Kirsten, 'Zambia', in Vorley, Feame and Ray (eds), *Regoverning Markets*, pp. 183–90.
36 *Ibid.*

37 Emongor, 'The Impact of South African Supermarkets', p. 109.

38 B. Kenny and C. Mather, 'Milking the Region? South African Capital and Zambia's Dairy Industry', *At Issue Ezine*, 8, 2 (June 2008), available at <http://www.africafiles.org/atissueezine.asp?issue=issue8#art5>, retrieved on 30 November 2009.

39 Emongor, 'The Impact of South African Supermarkets', p. 49.

40 Abrahams, 'Transforming the Region', p. 134.

41 Miller, 'Food Frontiers in Zambia'; B. Kenny and C. Mather, 'Milking the Region? South African Capital and Zambia's Dairy Industry', *At Issue Ezine*, 8, 2 (June 2008), available at <http://www.africafiles.org/atissueezine.asp?issue=issue8#art5>, retrieved on 30 November 2009.

42 N. Mason and T. Jayne, 'Staple Food Consumption Patterns in Urban Zambia: Results from the 2007/2008 Urban Consumption Survey', Food Security Research Project No. 36 (Lusaka, Ministry of Agriculture and Cooperatives, Agricultural Consultative Forum and Michigan State University, 2009), p. 3.

of their staple purchases from supermarkets, compared with 28 per cent 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. A related study of the tomato sub-sector in Zambian cities by Mwiinga seems to confirm these observations, showing that 90 per cent of the tomatoes marketed in Lusaka are currently produced by small farmers and marketed through open air markets.⁴³ The market share of the South African-dominated supermarket sector was only 10 per cent. In Botswana and Namibia, by contrast, supermarkets already account for 50 to 75 per cent of the food and grocery retail market.⁴⁴

Although supermarket penetration is therefore very uneven at present, the question is whether other countries will follow trends already documented in South Africa, Botswana and Namibia (as well as other parts of the South), and what the impact will be on the informal food economy. One general conclusion from the Zambian case seems to be that the informal economy remains extremely vibrant and will not be significantly impacted by modern supply chains orchestrated by South African supermarket firms. In Southern Africa as a whole, informal markets, informal traders and street foods continue to play a critical role in food provisioning. In 2006, for example, informal markets still accounted for more than 90 per cent of the market share of fresh fruit and vegetables marketed in most low-income SADC countries.⁴⁵ However, it would be premature to conclude that Southern Africa's supermarket revolution will therefore not radically transform urban food supply systems in countries outside South Africa in the future.

Supermarkets are certainly changing the food procurement strategies of poor urban households. But they are also prompting new strategies from informal street vendors and street food sellers. The Shoprite shopping precinct in urban Maseru, for example, is surrounded by a large fence. Inside, 'no hawking' signs warn informal retailers to stay off the property. Close by are scores of informal vendor stalls selling fresh and cooked food, some of it undoubtedly purchased from Shoprite itself, or the Fruit & Veg City a few blocks away, or the Hypermarket which recently opened its doors.

Street Traders and Street Food

Globally, a common criticism of the growing power and reach of supermarkets 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.⁴⁶ Louw, Chikazunga, Jordaan and Biénabe suggest that the same trend may be evident in South Africa:

43 M. Mwiinga, 'An Assessment of Tomato Price Variability in Lusaka and Its Effects on Smallholder Farmers' (M.Sc. thesis, Michigan State University, 2009); see also M. Hichaambwa and D. Tschirley, 'Zambia Horticultural Rapid Appraisal: Understanding the Domestic Value Chains of Fresh Fruits and Vegetables', Food Security Research Project Working Paper No. 17 (East Lansing, Michigan State University, 2006).

44 Emongor, 'The Impact of South African Supermarkets'.

45 Louw, Ndanga, Chikazunga and Jagwe, 'Restructuring Food Markets in the Southern African Region', p. 25.

46 T. Reardon and R. Hopkins, 'The Supermarket Revolution in Developing Countries: Policies to Address Emerging Tensions among Supermarkets, Suppliers, and Traditional Retailers', *European Journal of Development Research*, 18, 4 (2006), pp. 522–45; B. Minten and T. Reardon, 'Food Prices, Quality, and Quality's Pricing in Supermarkets versus Traditional Markets in Developing Countries', *Applied Economic Perspectives and Policy*, 30, 3 (2008), pp. 480–90; M. Franz, 'The Role of Resistance in a Retail Production Network: Protests against Supermarkets in India', *Singapore Journal of Tropical Geography*, 31, 3 (2010), pp. 317–29.

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.⁴⁷

Even though supermarkets are more visible and may 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. Proximity and physical access to consumers is by no means equivalent to actual accessibility, taking into account unemployment, inflation, transportation costs and the inconsistent provision of electricity. Fresh food buying often has to be done on a daily basis because of the lack of refrigeration. Access to refrigeration, then, becomes a determining factor in access to safe food. This is illustrated in the urban food markets of Maputo where some vendors sell Perdux frozen chickens (imported from Brazil and bought from local supermarkets). If they fail to make a sale, they refreeze the chickens overnight and bring them back to market the next day.⁴⁸ In addition, informal suppliers make a product more accessible by buying in bulk (a sack of oranges or a large packet of crisps) and sell on the items individually or in smaller quantities. In Maputo, for example, informal vendors repackage crisps and sweets and sell them in smaller amounts in plastic-wrap.

In one study of Tshwane Metro, Madevu argues that supermarkets have had a major impact on corner stores and greengrocers but that informal vendors are more resilient.⁴⁹ 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 supplier resilience in Johannesburg.⁵⁰ 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 expansion and the informal urban food economy 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 fifteen 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.⁵¹ However, this ignores the obvious point that although prices may be lower at the supermarkets they are also increasingly accessible geographically to poor urban consumers.

47 A. Louw, D. Chikazunga, D. Jordaan and E. Biénabe, 'Restructuring Food Markets in South Africa: Dynamics within the Context of the Tomato Subsector', *Agrifood Sector Studies, Regoverning Markets Project* (Pretoria, University of Pretoria, 2007), p. 25.

48 Interview with Market Vendor, Luis Cabral, Maputo, 23 July 2010.

49 H. Madevu, 'Competition in the Tridimensional Urban Fresh Produce Retail Market: The Case of the Tshwane Metropolitan Area, South Africa' (M.Sc. thesis, University of Pretoria, 2006).

50 C. Abrahams, 'Globally Useful Conceptions of Alternative Food Networks in the Developing South: The Case of Johannesburg's Urban Food Supply System', in D. Maye, L. Holloway and M. Kneafsey (eds), *Alternative Food Geographies: Representation and Practice* (Amsterdam, Elsevier, 2007), pp. 95–114.

51 *The Times* (Johannesburg), 'New Mall Leaves Alex Hawkers High and Dry', 8 June 2009, available at <http://www.biz-community.com/Article/196/345/36740.html>, retrieved on 30 April 2010.

The size and importance of the informal food sector is evident even to the most casual visitor to cities in Southern Africa. In 2000, there were an estimated 500,000 street traders in South Africa (more than 70 per cent of them women), a number that has probably grown considerably since then.⁵² More than 70 per cent of all street traders in the country sold fresh, processed or cooked food. In the Durban (eThekweni) metropolitan area there were about 20,000 traders and in Greater Johannesburg, 12 to 15,000. In Durban alone, street traders sold about 28 tonnes of cooked mealies (corn) every day.⁵³ Outside South Africa, a project on the street vending of cooked food found that there were 5,355 vendors in Lusaka and 1,100 in Harare.⁵⁴ In both cities, over 80 per cent of the vendors were female household heads and 60 per cent 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'.⁵⁵ The vendors employed 16,000 people, served more than 81 million meals of *nshima* (a corn flour porridge) and beef stew per year, and made an annual profit of over R600 million.

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 organisation of the trade, the scope of trader activities and the impact on trader households.⁵⁶ These studies suggest that income from these activities has 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. Less well-established is where informal cross-border traders and entrepreneurs actually source their foodstuffs. At markets and street stalls in Maputo, for example, it is immediately obvious that much of the fresh fruit and processed produce on offer is from South Africa and some of it is undoubtedly sourced from supermarkets in South African towns.

Household Income and Food Accessibility

The informal economy is estimated to account for 78 per cent of non-agricultural employment in Sub-Saharan Africa, 93 per cent of all new jobs created, and 61 per cent of urban employment.⁵⁷ 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 is derived 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,

52 ILO, *Street Traders and Their Organisations in South Africa* (Geneva, International Labour Organisation, 2003).

53 *Ibid.*

54 Natural Resources Institute, 'Improving Food Safety of Informally Vended Foods in Southern Africa', available at <http://www.nri.org/projects/streetfoods/project3.htm>, retrieved on 31 March 2010.

55 *Ibid.*

56 S. Peberdy and J. Crush, 'Invisible Trade, Invisible Travellers: The Maputo Corridor Spatial Development Initiative and Informal Cross-Border Trading', *South African Geographical Journal*, 83, 2 (1999), pp. 115–23; N. Nethengwe, 'Cross Border Dynamics in Southern Africa: A Study of Informal Cross Border Trade between South Africa and Zimbabwe' (MA thesis, University of the Witwatersrand, 1999); Muzvidziwa, 'Zimbabwe's Cross-Border Women Traders: Multiple Identities and Responses to New Challenges', *Journal of Contemporary African Studies*, 19, 1 (2001), pp. 67–80; J. Mwaniki, 'The Impact of Informal Cross Border Trade on Regional Integration in SADC and Implications for Wealth Creation', Report for Community Organisations Regional Network (CORN) (Harare, CORN, 2004); D. Ndlela, 'Informal Cross Border Trade: The Case for Zimbabwe', Occasional Paper No 52 (Johannesburg, Institute for Global Dialogue, 2006).

57 Kessides, 'The Urban Transition in Sub-Saharan Africa'.

informal activity (including purchase and sale of foodstuffs), pensions, child 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 Malawi and South Africa highlight different aspects of the connections between cash incomes and urban household food security. In Blantyre and Lilongwe, the relative importance of different income sources varied between middle and low-income and male and female-headed households.⁵⁸ Formal sector employment was the most important source of household income (60 per cent on average), followed by urban agriculture (17 per cent), business (16 per cent), rural agriculture (5 per cent) and informal employment (at less than 2 per cent). However, important differences emerged within the sample. In Blantyre, urban agriculture was a more important source of income than in Lilongwe (25 per cent versus 10 per cent), while formal employment was more important in Lilongwe. Informal employment was relatively insignificant in both cities. Urban agriculture was the most important income source for poorer households in both cities (42 per cent), followed by business and formal employment (at 26 per cent each). In comparison, urban agriculture was a relatively insignificant income source for better-off households (at 3 per cent) whose main source of income was formal employment (at 80 per cent). Significant differences also emerged by gender. Urban agriculture was the most important source for female-headed households (at 55 per cent), compared with only 4 per cent for male-headed households. On the other hand, 63 per cent of the income of male headed-households came from formal employment, compared with only 24 per cent for female-headed households.

A second study 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.⁵⁹ Many people were employed in the footwear and the clothing and textile sectors, which underwent major downsizing and lay-offs 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 sweatshop 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.⁶⁰

Rising unemployment had very negative effects on levels of food insecurity in households in both 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'

58 D. Mkwambisi, 'Urban Agriculture and Food Security in Lilongwe and Blantyre, Malawi', in M. Redwood, *Agriculture in Urban Planning: Generating Livelihoods and Food Security* (London and Ottawa, Independent Development Research Centre, 2008), pp. 91–104; D. Mkwambisi, E. Fraser and A. Dougill, 'Urban Agriculture and Poverty Reduction: Evaluating How Food Production in Cities Contributes to Food Security, Employment and Income in Malawi', *Journal of International Development*, 23, 2 (2011), pp. 181–203.

59 S. Mosoetsa, 'Urban Livelihoods and Intra-Household Dynamics: The Case of Mpumalanga and Enhlalakahle Townships, Kwazulu-Natal, South Africa' (Ph.D. thesis, University of Witwatersrand, 2005).

60 S. Mosoetsa, 'Urban Livelihoods and Intra-Household Dynamics', pp. 120–7.

inability to secure alternative and sustainable livelihood sources and income. Rather than 'strategising', the primary goal of these households has been sheer *survival*.⁶¹

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.⁶²

These two case studies raise a number of questions about household food security and vulnerability in Southern African cities. They suggest, first, that despite the widely divergent urban contexts, cash income is critical to household food security. Second, they confirm that households seek to diversify income sources, some of which can involve the production and/or sale of food itself. Third, they indicate that food insecurity can reduce social cohesion and increase the pressure on households with more resources. And finally, they suggest that when access to food declines, households modify their food consumption habits. All of these access-related hypotheses 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 impact on food security. Household food insecurity dramatically increased in 2007–2008 when the cost of food staples escalated worldwide.⁶³ It continued in the global financial crisis when rising unemployment eroded the purchasing power of many households. A recent World Bank study of the impact of rising food prices on poverty levels indicates that in many African countries, the urban poor are more badly affected than the rural poor.⁶⁴ Nearly 90 per cent of the increase in urban poverty due to global increases in food prices was a result of poor households becoming poorer rather than households falling into poverty.⁶⁵

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.⁶⁶

A study of urban wage rates and staple food prices in Mozambique, Kenya, Malawi and Zambia showed that urban food purchasing power had actually improved since the 1990s but the 2007–2008 food crisis halted a long-term improvement.⁶⁷ However, as the authors point

61 *Ibid.*

62 Crush, Frayne and McLachlan, *Rapid Urbanization and the Nutrition*.

63 J. Baker, *Impact of Financial, Food, and Fuel Crisis on Urban Poor: Directions in Urban Development* (Washington, World Bank Urban Development Unit, 2008); J. Clapp, 'Food Price Volatility and Vulnerability in the Global South: Considering the Global Economic Context', *Third World Quarterly*, 30, 6 (2009), pp. 1, 183–96; M. Cohen and J. Garrett, 'The Food Price Crisis and Urban Food (In)security', *Environment and Urbanization*, 22, 2 (2010), pp. 467–82.

64 Q. Wodon and H. Zaman, 'Rising Food Prices in Sub-Saharan Africa: Poverty Impact and Policy Responses', Policy Research Working Paper No. 4,738 (Washington, World Bank, 2008).

65 S. Dessus, S. Herrera and R. de Hoyos, 'The Impact of Food Inflation on Urban Poverty and its Monetary Cost: Some Back-of-the-Envelope Calculations', Policy Research Working Paper No. 4,666 (Washington, World Bank, 2008).

66 Wodon and Zaman, 'Rising Food Prices in Sub-Saharan Africa', p. 9.

67 N. Mason, T. Jayne, C. Donovan and A. Chapoto, 'Are Staple Foods Becoming More Expensive for Urban Consumers in Eastern and Southern Africa? Trends in Food Prices, Marketing Margins, and Wage Rates in Kenya, Malawi, Mozambique, and Zambia', International Development Working Paper No. 98 (East Lansing, Michigan State University, 2009).

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. As a result, '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'.⁶⁸

In her analysis of the determinants of food security in Kwazulu Natal, Misselhorn identifies 'social capital' as a key determinant of food accessibility.⁶⁹ 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 the majority of people in the community engage in some form of household-level agricultural activity (80 per cent) although only 4 per cent sell agricultural produce. Only 46 per cent of adults were in formal employment. Very few households engaged in informal income-generating activities. Nearly 20 per cent of households relied solely on one or more social grants (pensions being the most important).⁷⁰ Three forms of social capital were important in the community – the church, *stokvels* and social networks. 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'.⁷¹

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.⁷² 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.⁷³ While the social protection literature does not usually distinguish between 'urban' and 'rural' programmes, the level and growth of urbanisation in most countries means that by default many programmes have an explicit or implicit urban component or impact on urban populations and thus have a potential impact on urban food insecurity.

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, price shocks and attendant negative health impacts. In 2008–2009, the African Food Security Urban Network (AFSUN) conducted a baseline food security

68 *Ibid.*, p. 23.

69 A. Misselhorn, 'Food Security in Southern Africa: Causes and Emerging Response Options' (Ph.D. thesis, University of Witwatersrand, 2006); A. Misselhorn, 'What Drives Food Insecurity in Southern Africa? A Meta-Analysis of Household Economy Studies', *Global Environmental Change*, 15 (2004), pp. 33–43.

70 Misselhorn, 'What Drives Food Insecurity in Southern Africa?', p. 178.

71 *Ibid.*, p. 188.

72 D. Coady, 'Designing and Evaluating Social Safety Nets: Theory, Evidence, and Policy Conclusions', FCND Discussion Paper No. 172 (Washington, International Food Policy Research Institute (IFPRI), 2004); P. Townsend (ed.), *Building Decent Societies: Rethinking the Role of Social Security in State Building* (Basingstoke and Geneva, Palgrave Macmillan and ILO, 2009).

73 R. Holzmann, L. Sherburne-Benz and E. Tesliuc, *Social Risk Management: The World Bank's Approach to Social Protection in a Globalizing World* (Washington, World Bank, 2003); M. d'Escole and A. Salvini, 'Towards Sustainable Development: The Role of Social Protection', Social, Employment and Migration Working Paper No. 12 (Paris, OECD, 2003); M. Adato, A. Ahmed and F. Lund, 'Linking Safety Nets, Social Protection, and Poverty Reduction: Directions for Africa' (Washington, IFPRI, 2004); DFID, 'Social Protection in Poor Countries', Social Protection Briefing Note No. 1 (London, DFID, 2006); M. Sansom, 'Dynamic Social Security for Africa: An Agenda for Development: Developments and Trends' (Geneva, International Social Security Association, 2008); A. Barrientos and D. Hulme (eds), *Social Protection for the Poor and Poorest* (London, Palgrave Macmillan, 2008); A. McCord, 'Social Protection: A Global Imperative' (London, Overseas Development Institute, 2009); F. Ellis, S. Devereux and P. White, *Social Protection in Africa* (Cheltenham, Edward Elgar, 2009).

household survey in poorer communities in eleven SADC cities in nine different countries. A total of 6,453 households were randomly surveyed on a range of food security issues.⁷⁴ The survey found that only 53 per cent of poor urban households were receiving income from formal employment at the time of the survey (Table 4). The proportion varied from a high of 82 per cent in Windhoek to a low of 38 per cent in Msunduzi. Within South Africa, there was also variation with Johannesburg at 61 per cent and Cape Town at 49 per cent, both higher than Msunduzi. Maputo was surprisingly high (at 66 per cent) but this may be because many have household members working in South Africa. Income from casual work was most important in Maseru (39 per cent of households), Harare and Msunduzi (both 32 per cent) and least important in Johannesburg and Windhoek.

The other relatively significant sources of income reported were informal sector employment (for 15 per cent of households) and social grants (20 per cent of households). A much smaller number of households said they receive income from cash remittances (9 per cent), rent (6 per cent), businesses (4 per cent) and gifts (2 per cent). Notably, very few urban households earned income from the sale of agricultural produce (only 2 per cent). In only one city, Blantyre, were more than 5 per cent of poor households earning income from urban agriculture. Even in this city, the majority (85 per cent) earned nothing this way.

Less than 10 per cent of households in every city except Lusaka derived income from formal sector business. The informal economy was a more important source of household income (affecting 15 per cent of households) although this also varied markedly from city to city. As many as 44 per cent of the households in Blantyre and as few as 3 per cent in Johannesburg received income from informal business. In Lusaka and Maputo, around a quarter of the households said they made money from informal activity. In the other cities, the figure was less than 15 per cent.

While 20 per cent of households in total received social grants (primarily in the form of pensions, child support grants and disability allowances), the numbers varied considerably from city to city. In the three South African cities, however, the numbers were much higher: 65 per cent in Msunduzi, 43 per cent in Cape Town and 25 per cent in Johannesburg. When South Africa is removed from the equation, the figure drops to only 5 per cent, reflecting the very limited degree of social protection in other countries included in the survey. In seven of the eleven cities surveyed, less than 10 per cent of poor urban households were receiving social grants. In Maseru, Lesotho, where social grants were recently introduced, the number was 13 per cent.

A general rule of thumb is that the poorer a household, the greater the proportion of income it spends on food. The AFSUN survey confirmed that (a) food purchase is the most important use of income amongst poor urban households in the surveyed cities; (b) the proportion of income spent on food is very high (averaging 49 per cent in total) and (c) the poorer the household the greater the proportion of income spent on food (increasing from 44 per cent in the highest tercile to 55 per cent in the lowest) (Table 5). Again there was variation from city to city. In all of the cities, there was a common pattern of higher proportional expenditure on food by poorer households, although the difference between the poorest and least poor terciles varied. In Maputo, for example, the difference was minimal (from 53 per cent to 51 per cent). More typically, there was a significant drop: for example, Msunduzi (58 per cent to 45 per cent), Johannesburg (61 per cent to 42 per cent), Blantyre (57 per cent to 36 per cent) and Windhoek (46 per cent to 24 per cent). In six of the cities, over 50 per cent of household income was spent on food purchases (including all three South African cities in the survey).

74 For details of the survey methodology see B. Frayne, W. Pendleton, J. Crush, B. Acquah, J. Battersby-Lennard, E. Bras, A. Chiweza, T. Dlamini, R. Fincham, P. Kroll, C. Leduka, A. Moshu, C. Mulenga, P. Mvula, A. Pomuti, I. Raimundo, M. Rudolph, S. Ruysenaa, N. Simelane, D. Tevera, M. Tsoka, G. Tawodzera and L. Zanamwe, *The State of Urban Food Insecurity in Southern Africa*, Urban Food Security Series No. 2 (Cape Town and Kingston, AFSUN, 2010), available at <http://www.afsun.org>

Table 4. Sources of household income (% of Households), 2008.

	Windhoek	Gaborone	Maseru	Manzini	Maputo	Blantyre	Lusaka	Harare	Cape Town	Msunduzi	Joburg	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 (cash)	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 agriculture	2	2	2	3	6	7	1	1	0	0	0	2
Urban agriculture	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
Social Grants	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	448	400	802	500	397	432	400	462	1060	556	996	6453

*Multiple response question; N = 6,453

Table 5. Food expenditures as proportion of total income.

	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

Sourcing Food

Household income and the ability to purchase food are critical to household food security in poor urban communities in Southern Africa. Only a very small minority of households earn any income from participation in the informal economy. Yet, many poor households depend on informal sources for their food needs. Some 70 per cent of households in the AFSUN survey normally sourced food from informal outlets (see Table 6), while 32 per cent of households patronised the informal food economy almost every day and 59 per cent did so at least once a week (see Table 7). In the week prior to the survey, 60 per cent of households had bought food from informal suppliers.

The informal food economy proved to be particularly important in cities such as Lusaka, Harare, Blantyre and Maputo (where over 95 per cent of poor households normally obtain food from informal sources at least once a week). Their importance varied considerably in the three South African cities (from a high of 85 per cent in Johannesburg to a low of only 42 per cent in Msunduzi). In Windhoek, around three quarters of households normally sourced informal food but only a half did so in Maseru and Manzini. Households in Gaborone were the least reliant on the informal food economy (at only 29 per cent). In the larger cities, where more than one area was sampled, the differences were not as significant as expected. In Johannesburg, for example, over 80 per cent of surveyed households sourced informal food in each of the areas of Alexandra, the Inner City and Orange Farm. The inter-city variability, and absence of intra-city variation, is striking and cannot easily be explained without more research on the size and nature of the informal food economy in each city.

The extremely frequent patronage of the informal food economy suggests that accessibility is a key factor. Food insecure households are more likely to rely on informal sources than food secure households (see Figure 3) which suggests that cost may also be an important consideration. In general, patronage of the informal food economy was higher in the cities where supermarkets have less of a presence, although Johannesburg was an important exception to this generalisation.

The degree of dependence on informal food sources confirmed our prior assumptions about the role of the highly visible informal food economy in the sourcing strategies of poor urban households. What was not anticipated was the high degree of supermarket patronage by poor households. As discussed above, supermarket expansion is dramatically changing urban

Table 6. Sources normally used to obtain food (% of households).

	Windhoek	Gaborone	Maseru	Manzini	Maputo	Blantyre	Lusaka	Harare	Cape Town	Msamduzi	Johannesburg	Total
Informal market/street food	76	29	49	48	98	99	100	98	66	42	85	70
Small shop/restaurant/take away	84	56	89	49	78	69	80	17	75	40	80	68
Supermarket	97	97	84	90	23	53	16	30	94	97	96	79
Food transfers from rural household	47	22	37	35	20	36	44	42	17	24	14	28
Urban agriculture	3	5	47	10	23	64	3	60	5	30	9	22
Borrowed food from others	12	3	41	18	20	11	8	42	29	24	6	21
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
Food remittances	5	4	14	3	12	17	13	19	6	5	2	8
Community food kitchen	0	0	1	18	0	0	0	3	6	1	9	4
Food aid	1	6	3	1	1	2	1	2	3	5	2	2
Other source	1	5	1	0	0	2	3	6	2	1	0	2

*Multiple responses permitted; N = 6,453

Table 7. Patronage of informal food economy (% of households).

	Cape Town											Total
	Windhoek	Gaborone	Maseru	Manzini	Maputo	Blantyre	Lusaka	Harare	Msunduzi	Johannesburg		
In previous week	67	23	28	39	94	97	97	96	29	77	60	
Frequently (at least 5 days a week)	35	12	11	10	75	80	91	78	6	22	32	
At least once a week	30	11	23	27	17	15	7	17	21	50	27	
At least once a month	8	3	10	7	5	1	0	2	14	10	7	
At least once every six months	2	1	1	1	0	0	0	0	1	2	1	
Occasionally (less than once a year)	0	0	2	0	0	0	0	0	0	0	0.5	
Never	25	71	51	54	2	4	1	3	58	16	31	

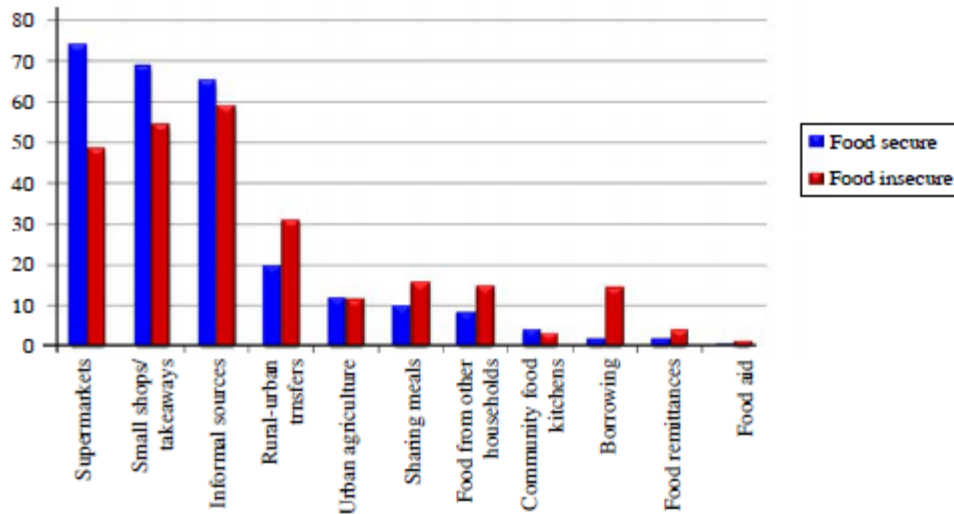


Figure 3. Sources of food for food secure and insecure households.

food supply systems in Southern African countries. We assumed that this process was probably having a significant impact on middle and upper income households but little effect on poorer households, notwithstanding growing evidence that supermarket chains have themselves been moving closer to poorer areas in many cities. Across the sample as a whole, however, 78 per cent of households indicated that they purchased food from supermarkets and 54 per cent had done so in the previous week (Table 8). In the countries where supermarkets dominate the urban food supply the patronage figures were even higher, at over 90 per cent in Johannesburg, Cape Town, Msunduzi, Gaborone, Manzini and Windhoek. In the countries where South African supermarket penetration is currently not as advanced, patronage is lower and less frequent though still not absent: for example, 53 per cent of poor households in Blantyre said they buy food from supermarkets, as did 30 per cent in Harare and 23 per cent in Maputo. Only in Lusaka was patronage of supermarkets significantly lower (at only 14 per cent of households).⁷⁵

The most significant difference between supermarkets and the informal food economy was frequency of patronage. While over half of the households had purchased food from supermarkets in the previous week, food is not generally sourced from supermarkets with anything like the frequency of the informal food economy. Only a quarter of the households said that they patronise supermarkets more than once a week (less than half of the number who use informal sources). The majority of poor urban households surveyed (51 per cent) buy at supermarkets just once a month. In six of the eleven cities, over 60 per cent purchase supermarket food once a month. Although the question of who buys what where is the subject of ongoing research, this might suggest a generalised pattern of bulk buying of staples at supermarkets and reliance on the informal food economy for other foodstuffs. In addition, many formal sector employees are paid once a month and this may provide the cash for bulk buying on a monthly basis.

At this point in time it appears that the informal food economy co-exists with supermarkets, even in cities where the urban food supply is increasingly controlled by corporate supply chains. In cities where supermarket penetration is very recent, the informal

⁷⁵ The Lusaka survey was conducted in Chipata Compound and may underestimate the patronage of supermarkets in the city as a whole; see Crush, Hovorka and Tevera, 'Food Security in Southern African Cities', p. 297.

Table 8. Patronage of supermarkets (% of households).

	Windhoek	Gaborone	Maseru	Manzini	Maputo	Blantyre	Lusaka	Harare	Cape Town	Msunduzi	Johannesburg	Total
In previous week	83	79	50	52	3	28	12	12	68	57	80	54
Frequently (at least 5 days a week)	8	10	4	5	0	5	2	2	4	1	9	5
At least once a week	32	19	17	18	2	16	4	9	23	19	24	19
At least once a month	53	65	62	65	6	24	8	12	65	76	60	51
At least once every six months	2	1	1	1	2	5	0	3	1	0	0	2
Occasionally (less than once a year)	0	0	0	1	13	1	0	4	0	0	1	1
Never	4	4	16	10	77	48	85	70	6	3	5	22

economy does appear to be more robust as a food source for the urban poor. This might indicate that supermarkets do provide significant and growing competition for informal suppliers. The nature of the interface between supermarkets and the informal food economy requires further research. Conceptually, it is important to avoid the dualistic trap of viewing the two as monolithic 'sectors' in opposition to one another. Supermarkets are providing intense competition but they can also be taken advantage of by informal suppliers. In Maputo, for example, even a casual inventory of the informal food sector suggests that it sources a great deal of its processed and fresh produce from South Africa and that a significant proportion of that food is purchased from supermarkets over the border. The more pertinent question is not whether supermarkets are relentlessly driving informal suppliers out of business (which is clearly not the case) but whether there are spatial and economic niches in the city where mobile informal suppliers can provide a service that supermarkets cannot.

The AFSUN survey also confirms that poor urban households source food through social networks (see Figure 3). Misslehom's arguments about the importance of social capital in urban communities receive some support from the survey results.⁷⁶ One in five of the sample households noted that they had received food from relatives or neighbours in the previous week. Just as many indicated that they had shared their own food with neighbours and relatives. Inter-household food transfers also extend to food borrowing, which 21 per cent of households indicated as a food source in the previous week. For reasons that require further investigation through qualitative research, this form of social capital appears much stronger in Cape Town than in other cities. Nor is it strongly correlated to the overall degree of food insecurity in a city.

Another important source of food in some cities linked to social networks is the transfer of foodstuffs from rural households to their migrant members in the cities. This phenomenon has been extensively documented in the case of Windhoek, Namibia.⁷⁷ That study of 305 poor urban migrant households found that poverty was widespread and accompanied by high rates of unemployment. In addition, casual work was not a commonly available income strategy for low-income residents. The informal economy was limited and urban agriculture made little contribution to household food security. The resources required to satisfy food and other needs came predominantly from the rural areas direct to the urban household. The most vulnerable households were those that had poor rural connections. The food received included millet, wild foods (especially spinach), meat, poultry and fish. In Windhoek, therefore, 'urban food security for economically marginal households is dependent to a large degree on the transfer of rurally-produced food from relatives'.⁷⁸ The AFSUN survey found that 47 per cent of poor urban households received food transfers from rural relatives in Windhoek, confirming these earlier observations. Although food transfers are more important in Windhoek than any other city surveyed, there was significant reliance in several other cities as well including Lusaka (43 per cent of households), Harare (42 per cent), Maseru (37 per cent), Blantyre (36 per cent) and Manzini (35 per cent). Rural-urban food transfers are much less important in South African cities.⁷⁹ Overall, such food transfers were more important to households that were food insecure (31 per cent of those households) than food secure households (20 per cent).

76 Misslehom, 'Food Security in Southern Africa'.

77 B. Frayne, 'Survival of the Poorest: Food Security and Migration in Namibia' (Ph.D. thesis, Queen's University, 2001); B. Frayne, 'Migration and the Changing Social Economy of Windhoek, Namibia', *Development Southern Africa*, 24, 1 (2007), pp. 91–108.

78 Frayne, 'Survival of the Poorest', p. 278.

79 B. Frayne, 'Pathways of Food: Migration and Food Security in Southern African Cities', *International Development Planning Review*, 32, 3/4 (2010), pp. 83–104.

Urban agriculture is beginning to enjoy a revival of interest amongst policy-makers at the national and municipal level in Southern Africa.⁸⁰ The AFSUN survey suggests that such optimism could be misplaced.⁸¹ Overall, nearly 80 per cent of the surveyed households said they do not engage in any form of urban agriculture (be that crops or livestock). In six of the eleven cities, 90 per cent or more of the surveyed households do not engage in any form of urban agriculture. Only 4 per cent tend animals, primarily poultry. In Johannesburg, there was virtually no urban food production in the inner-city, a little more in the newer informal settlement of Orange Farm and more still in the established township of Alexandra. Across the region, there was also considerable variation from city to city. The figure was only 40 per cent in Harare and 37 per cent in Blantyre. However, even in those cities where a greater proportion of poor urban households obtain some of their food from agriculture, its importance in meeting overall household food needs is debatable, except in Harare. For example, in Blantyre, while 60 per cent of households are involved in urban agriculture, only one per cent said they source home-grown food more than once a month.

Conclusion

This article has addressed several key urban food security questions in Southern Africa: where do the urban poor get their food? How important is food purchase to poor urban households? To what extent do poor urban households rely on non-monetised sources of food (such as urban agriculture)? The AFSUN survey reveals overall similarities and some significant differences between cities across the region. 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.

The first issue is the growing role of supermarkets in urban food supply chains in all Southern African countries. The growing power of agri-food chains and supermarkets in the developing world – and its impact on all aspects of food security in cities – has been examined in considerable depth elsewhere.⁸² In Southern Africa, however, the research literature is still very much in its infancy.⁸³ Nor is it likely to be furthered by the current global food security research agenda with its focus on providing technical inputs to smallholders and assuming the market will take care of the rest. With all of the money now being directed at ‘food security research’ by international organisations and national governments, it is worth asking how much of it is being devoted to understanding one of the central drivers of change (agri-food supply chains) and what role international organisations and national governments 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

80 C. Rogerson, ‘Resetting the Policy Agenda for Urban Agriculture in South Africa’, *Journal of Public Administration*, 45, 2 (2010), pp. 373–83; C. Rogerson, ‘Urban Agriculture and Public Administration: Institutional Context and Local Response in Gauteng’, *Urban Forum*, 22 (2011), pp. 183–98.

81 Crush, Hovorka and Tevera, ‘Food Security in Southern African Cities: The Place of Urban Agriculture’.

82 T. Reardon, P. Timmer and J. Berdegue, ‘The Rapid Rise of Supermarkets in Developing Countries: Induced Organizational, Institutional, and Technological Change in Agrifood Systems’, *Journal of Agricultural and Development Economics*, 1 (2004), pp. 168–83; T. Reardon and R. Hopkins, ‘The Supermarket Revolution in Developing Countries: Policies to Address Emerging Tensions among Supermarkets, Suppliers, and Traditional Retailers’, *European Journal of Development Research*, 18 (2006), pp. 522–45; T. Reardon, S. Henson and J. Berdegue, ‘Proactive Past-Tracking Diffusion of Supermarkets in Developing Countries: Implications for Market Institutions and Trade’, *Journal of Economic Geography*, 7 (2007), pp. 399–431.

83 Weatherspoon and Reardon, ‘Rise of Supermarkets in Africa’; Miller, ‘Food Frontiers in Zambia’; Kenny and Mather, ‘Milking the Region? South African Capital and Zambia’s Dairy Industry Africa’; Bench Marks, ‘Shoprite in Malawi, Swaziland and Zambia’ (Johannesburg, Bench Marks Foundation, 2009) available at <http://www.africafiles.org/article.asp?ID=18515>, accessed on 18 April 2010.

provider of inputs to small farmers.⁸⁴ This is clearly a narrow view, which diverts attention away from what is actually happening on city streets and in poor urban communities.

Recently there have been signs of a new global recognition of the reality of agribusiness involvement 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.⁸⁵ 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 first convened in Rome and is now an annual event at which international organisations, national governments and private sector companies meet to promote food security as a 'business opportunity'.

In March 2010, a number of international organisations 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.⁸⁶

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'.⁸⁷ 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.⁸⁸ For want of space, he leaves out any discussion of the environmental and nutritional dimensions of the practices of supermarkets 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 supermarket expansion for urban food security.⁸⁹

In a market-driven, neoliberal world the policy implications of corporate 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.⁹⁰ 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

84 Reardon, Barrett, Berdegue and Swinnen, 'Agrifood Industry Transformation and Small Farmers'.

85 'Enabling Environments for Agribusiness and Agro-Industry Development in Africa', Proceedings of an FAO Workshop, Accra, Ghana, 8–10 October 2007.

86 See Pan African Agribusiness Consortium (PanAAC) at <http://www.panaac.org>, accessed on 1 July 2010.

87 O. De Schutter, 'Report of the Special Rapporteur on the Right to Food', United Nations General Assembly, New York, 22 December 2009, p. 3.

88 *Ibid.*, p. 5.

89 S. Bolwig, S. Ponte, A. Du Toit, L. Riisgaard and N. Halberg, 'Integrating Poverty and Environmental Concerns into Value-Chain Analysis: A Conceptual Framework', *Development Policy Review*, 28, 2 (2010), pp. 173–94.

90 S. Maxwell and R. Slater, 'Food Policy Old and New', *Development Policy Review*, 21, 5–6 (2003); P. Timmer, 'Do Supermarkets Change the Food Policy Agenda?', *World Development*, 37, 11 (2009), pp. 1,812–19.

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'.⁹¹

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 stabilisation to balance the interests of consumers and producers and on 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.⁹² 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'.⁹³

The second major issue that arises from this article is the role of the informal food economy in the food security of the urban poor. As this article has suggested, there is very little evidence available about the impact of supermarket expansion on the urban informal economy. In this respect, Skinner (who has studied the informal food economy in Durban) notes that 'while national data on street vending is scarce, city level statistics are even rarer'.⁹⁴ The problem goes deeper than a lack of statistical information. The current international concern with food security largely ignores the urban informal food economy because it largely ignores the urban.⁹⁵

Although informality is, indeed, the 'main game in town', there is a strong sense that governments still do not want to play. Skinner, for example, notes that 'state responses to street trading form a continuum from violent sustained evictions on the one side, to a more inclusive approach on the other'.⁹⁶ At the same time, 'ongoing and low level harassment of informal traders is pervasive across African cities'.⁹⁷ Ray Bromley, who has been studying the informal sector since the 1970s, concludes that the challenge is a global one: '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'.⁹⁸ The absence of regulatory controls on supermarket expansion in urban markets contrasts sharply with the

91 Timmer, 'Do Supermarkets Change the Food Policy Agenda?', p. 1,812.

92 D. Tschirley and D. Abdula, 'Toward Improved Marketing and Trade Policies to Promote Household Food Security in Central and Southern Mozambique: 2007 Update', Research Report No. 62E (Maputo, Economics Directorate, Ministry of Agriculture and Rural Development, 2007); P. Dorosh, S. Dradri and S. Haggblade, 'Regional Trade, Government Policy and Food Security: Recent Evidence from Zambia', *Food Policy*, 34 (2009), pp. 350–66; D. Tschirley and T. Jayne, 'Exploring the Logic Behind Southern Africa's Food Crises', *World Development*, 38, 1 (2010), pp. 76–87.

93 Timmer, 'Do Supermarkets Change the Food Policy Agenda?', p. 1,818.

94 C. Skinner, 'Street Trade in Africa: A Review', Working Paper No. 51 (Durban, School of Development Studies, University of KwaZulu-Natal, 2008), p. 12.

95 G. Porter, F. Lyon and D. Potts, 'Market Institutions and Urban Food Supply in West and Southern Africa: A Review', *Progress in Development Studies*, 7, 2 (2007), pp. 115–34.

96 Skinner, 'Street Trade in Africa', p. 1.

97 *Ibid.*, p. 15.

98 R. Bromley, 'Street Vending and Public Policy: A Global Review', *International Journal of Sociology and Social Policy*, 20, 1 (2000), p. 22.

often punitive regulations imposed on informal street traders and food vendors. Both potentially constitute pathways to greater food security for the urban poor.

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