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# **CONSTRAINTS OF SISAL PRODUCTION IN SOUTH AFRICA**

**WITH REFERENCE TO SPECIFIC ECOLOGICAL  
AND ECONOMIC PREREQUISITES**

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## 6. CONCLUSIONS

The selected private and state sisal farms experience different constraints. State farms have to cope with indigent management, the direct influencing control from the government and the dependence on paid public subsidies; whereas, private farms are more concerned by the effects of sociopolitical changes in the South African society, fibre price developments and events like bush fires or droughts.

Within the framework of restructuring, it should therefore be a goal to exclude governmental authorities from the farming enterprise and to expand small and medium scale farms in response to affirmative action from the rural communities. Careful guidance, financial support and the extended redistribution of state owned (sisal-) land are essential prerequisites to achieve this goal. Large scale farming with a more capital intensive production is applicable only under capable management and administration staff and if a task system or other incentive system for labour remuneration is adapted. Furthermore, in view of the increasing labour costs, the productivity of labour needs to be enhanced. Especially harvest procedures like bundling and loading of leaves and processing steps show potential for mechanization in order to lower labour costs.

A co-existence of both mentioned configurations, in terms of the centralized processing of green leaves or dried fibre, is beneficial because it implicates an improvement of fibre quality but also high capital investments to be effected for automatic decorticators or brushing machines. Therefore, private entrepreneurs or rural associations performing the investments and processing of raw fibre at each stage would contribute to boost quantitative and qualitative fibre production.

The viability of a restructuring process and its acceptance by the participating groups depends largely on expected fibre prices and market perspectives. The implementation of such a project should be coupled with long term supplier contracts between producers and customers to buffer any adverse, world fibre market developments. This is emphasized in that the growth conditions for sisal found at the investigated sites are suitable for other cash or food crops as well, which affects the incentive to cultivate sisal by raising the opportunity costs for not growing another crop.

In general, the competitiveness of the sisal industry is determined by the linear production system and the development of new applications for sisal fibres. Alternative systems to extract a wider range of products from the sisal plant are necessary to increase the sustainability of this industry in South Africa.