



Hotel Thule

Wednesday, 20 July 2011



Government of Namibia  
Ministry of Environment & Tourism

**giz**



COOPERATION  
REPUBLIC OF NAMIBIA  
FEDERAL REPUBLIC OF  
GERMANY

The report was compiled by Dr. Diana L. van Schalkwyk, Food Chain Solutions Namibia, for the Biodiversity and Sustainable Land Management (BSLM) Project. BSLM is a joint project of the Ministry of Environment and Tourism (MET) and the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and funded by the German Federal Ministry for Economic Cooperation and Development (BMZ).

The report was handed in on Wednesday, 27.07.2011. On 04.08.2011 it was approved by the BSLM project including MET and GIZ.

## **RATIONALE & PROGRAMME**

The game meat stakeholder workshop comprised of two sessions namely the launch of the TRAFFIC study *“An analysis of game meat production and wildlife-based land uses on freehold land in Namibia: links with food security”* by Dr Peter Lindsey followed by a game meat stakeholder consultation synthesis meeting on the upgrading options of the game meat value chain and the conceptualization of a game meat association.

Apart from the invited speakers, a total of forty-seven participants attended the workshop. They were from both, private and public sectors – a well-balanced audience. (Attendance list attached).

## **TRAFFIC LAUNCH**

Mr. Russell Taylor from the WWF served as chairperson for the first session. The two sessions were opened by the undersecretary of the Ministry of Environment and Tourism, Mr. Simeon Negumbo. In his welcoming remarks he mentioned that the Ministry of Environment and Tourism’s strategic plan for 2008-2012 contains a lot of activities considering the development of wildlife and also game meat in particular. He also stressed that increased game numbers can still bring more benefits to the communal areas and income diversification will play an important role for the future success.

In his opening speech, Dr. Romeo Bertolini, the Counselor for Development Cooperation in the Embassy of the Federal Republic of Germany, said that the challenge to add further value to the sector and to integrate communal conservancies into the game meat value chain is likewise demanding because it requires the development of know-how that currently is mainly within the private sector. He also emphasized that through sustainable utilization of resources such as game meat production, a further green industrialisation can be promoted and poverty can be reduced.

With the introduction to the TRAFFIC study Dr Peter Lindsey mentioned that considerably more game meat is produced on Namibian farmlands than previously recognized (16–26million kg/year). Oryx *Oryx gazella*, Greater Kudu *Tragelaphus strepsiceros* and Springbok *Antidorcas marsupialis* are responsible for producing approximately two thirds of game meat on freehold farms. Off-take as proportion of a species population is increasing, although still well within sustainable limits.

Farmers sell approximately 52% of the game meat they produce (including that sold to biltong hunters). Prices paid to farmers for game meat have increased by 45% in the last two to three years, although they are still 13–17% lower than prices paid for meat from livestock. Nonetheless, game meat is sold in stores for higher prices than those for meat from livestock. The price of game meat can be significantly enhanced through processing, marketing and exports to the European Union.

Mr. David Newton, Regional Officer for TRAFFIC concluded the first session with a few remarks on lessons learned from other projects on the incorporation of activities in communal communities into formal value chains.

## **STAKEHOLDER CONSULTATION SYNTHESIS MEETING**

### **Overview**

Within the focal area of natural resource management, the German Government provides support to strengthening the management capacity of Namibian institutions in the land, water, and environment sectors. This support includes the MET/GIZ Biodiversity and Sustainable Land Management (BSLM) project. Under its bio-trade component the project seeks to foster the creation of new biodiversity-based opportunities for income generation, particularly for the poor rural population.

## **Stakeholder consultation meetings**

Aiming at upgrading of the Namibian game meat value chain, a series of stakeholder consultation meetings were held from April to July 2011. A summary of the synthesis of the results from the first and second rounds of stakeholder consultation meetings was given to the participants in a power point presentation by Dr. Diana van Schalkwyk during the stakeholder consultation synthesis meeting.

### ***Feedback - first round of meetings (April –June 2011)***



The first round of stakeholder consultation meetings revealed the needs, constraints and opportunities within the game meat value chain. Five priority areas were identified, namely:

- Sharing of information between value chain actors;
- Formalisation of the value chain;
- Simplifying of regulations and processes pertaining to quota setting, harvesting, processing, trade etc.
- Access to investment capital and incentives for investments; and
- The need for a common body to serve as a forum for the game meat industry.

Detailed information on the feedbacks of the different stakeholders can be found in the attached documents.

***Feedback - second round of meetings (June – July 2011)***



A vision and future strategies were formulated during the second round of stakeholder meetings. Participants used tools for value chain upgrading to pinpoint upgrading strategies in the areas of market penetration, market development, product development and product diversification. A second approach was followed, whereby strategies along the value chain were also formulated and discussed. Results from the second round (Ansoff matrix) are summarised as follows:

<b>Ansoff matrix</b>	<b>Current products</b>	<b>New products</b>
<b>Current markets</b>	<b>Market penetration strategy</b> Increase volumes & prices in current markets Increase volumes of game meat sold to local markets	<b>Product development strategy</b> Include large game as export product Include chilled game as export product New value-added products
<b>New markets</b>	<b>Market development Strategy</b> Investigate/research new markets Create awareness in new markets	<b>Product diversification strategy</b> Game skins Game offal Other secondary businesses

Results from the second round (analysis among the value chain) are summarised as follows:

*Governance*

- Create a conducive environment for business
- Clarify ownership of game;
- Protection of intellectual property; and
- Establish a national game meat export policy.

*Production*

- Compile a national strategy for wildlife use;
- Promote sustainable harvesting of game;
- Use expert advice in the production process;
- Control numbers of game harvested per region; and
- Incorporate communal conservancies in the Value Chain.

*Processing*

- Decentralise processing of game meat to remote areas;
- Maintain the regulation of the industry by the competent authorities;
- Increase the efficiency of game meat processors (capacity utilization & synergies).

*Trade*

- Brand game meat and game meat products to increase value
- Improve consistency of supply of game meat; and
- Improve marketing and sales of game meat.

*Consumption*

- Embark on awareness campaigns for game meat; and
- Conduct consumer surveys on prices and products.

**Consolidating third stakeholder meeting (20 July 2011)**



The objective of the third stakeholder consultation meeting held on 20 July 2011 was to facilitate ideas for the formation of a game meat association, which should further facilitate value chain promotion and provide various services to the members, being



actors in the value chain. Mr. Nickey Gaseb assisted with the facilitation during this session.

Respective ideas were formulated and several proposals were raised for the provision of different services to the members and on the structure/membership base of the association.

#### *Association's name*

The participants at the meeting agreed to the name 'GAME MEAT ASSOCIATION of NAMIBIA', abbreviated 'GMAN', as a name for the association.

#### *Proposed services*

Proposed services to the members are summarised as follows:

- Information dissemination, research, knowledge transfer
- Exchange on business constraints with policy makers
- Awareness creation on game meat amongst consumers
- Promote best practices and standards
- Building a forum for all stakeholders

#### *Membership base*

All stakeholders expressed their strong interest to include Government Ministries into the body. One of the suggestions pertaining to selection of a membership base was to appoint representatives (institutions or individuals) from the various groups of value chain actors as full members and from the line Ministries as associated members without voting rights on such a body. The suggestion of the governmental representatives was to reserve an advisory role for the governmental representatives in order to ensure the exchange with the regulatory instance and to avoid a conflict of

interests with the anticipated service portfolio of the association taking decisions with direct impact on the overall game meat business.

*Membership base (full members)*

- Communal farmers/conservancies
- Commercial/emerging farmers/conservancies
- Game harvesters
- Game meat processors
- Retailers/Restaurants /Butcheries/Consumer bodies

*Membership base (associate members)*

- Ministry of Agriculture, Water and Forestry (MAWF)
- Ministry of Environment and Tourism (MET)
- Ministry of Trade and Industry (MTI)
- Ministry of Health and Social Welfare (MHSS)
- Ministry of Regional and Local Government and Housing (MGRLH)
- Namibian Standards Institution (NSI)
- Non-governmental Organisations (NGOs) – including academics, HAN, NTB, NAPHA etc.

*Funding*

The NSI offered to host the secretariat for the Namibian Game Meat Association in terms of providing office space and the members of the meeting agreed to this proposal. Additional sponsorships/grants will be perused. The stakeholders agreed that a small annual membership fee should be paid by registered full members.

*Constitution & Task Team (Interim Steering Committee)*

A draft constitution will be prepared for finalization by the task team elected during the stakeholder consultation synthesis meeting comprising of the following members:

- Mr Lesley Kauandara (Gobabis communal farmers)
- Mr Lesley Tjongarero (!Gaingu Conservancy)
- Mr Werdus Smith (Koës Culling Team)
- Dr Diana van Schalkwyk (Consultant)
- Mr David Knitter (BSLM team)
- Mr Daniel Kehrer (BSLM team)

### **Way forward**

The task team needs to clarify with the MET (supporting through the BSLM project) how the line ministries and stakeholders can be approached to nominate members for the association.

Upon finalisation of the constitution, the task team (interim steering committee) will convene an inaugural meeting in August or September 2011, where the constitution would be approved by the stakeholders and a board and a secretariat would be elected for the Namibian Game Meat Association. The Board would then proceed with its regular meetings facilitated by the Secretariat.

### **Annexes:**

1. Attendance lists all workshops
2. Agendas Round 1, 2, and synthesis workshop
3. Presentations
4. Speeches
5. Summaries of the consultation workshops
6. Press release TRAFFIC study
7. Press articles

**Annex 1: Attendance lists all workshops**

**ATTENDANCE LIST – GAME HARVESTERS – 15 APRIL 2011**

<b>NAME</b>	<b>COMPANY</b>	<b>CELL NO</b>	<b>E-MAIL</b>
Louwtjie Opperman	Nossob Culling Team	0811291628	lopperman@pennypinchers.co.za
Werdus Smith	Koës Culling Team	0814147816	werdus@iway.na
Lafras Lanrezrs	Koës Culling Team	+27836311961	Lafras.Bis@mweb.co.za
Massofine Krynauw	NAPHA	0813082623	marso@napha.com.na
David Knitter	GIZ	0814005252	david.knitter@giz.de
Daniel Kehrer	GIZ	0814240873	daniel.kehrer@giz.de
Diana van Schalkwyk	FoodChainSolutions	0811273020	foodsafetynam@gmail.com

**ATTENDANCE LIST – GAME MEAT PROCESSORS - 26 APRIL 2011**

<b>NAME</b>	<b>COMPANY</b>	<b>CELL NO</b>	<b>E-MAIL</b>
Solomon Nemaire	Brukarros Meat Processors	0811245356	solomon@bmp.com.na
Fanie du Plessis	Hartlief	0811270015	nsduplessis@mweb.co.za
Jan Mostert	Namaqua Meat	0811472212	mos-mar@mweb.com.na
Herman Fourie	Closwa	0811247119	herman@closwa.com
Jan Schutte	Meatco/Namco	0812234917	jan@namco.com.na
David Knitter	GIZ	0814005252	david.knitter@giz.de
Diana van Schalkwyk	FoodChainSolutions	0811273020	foodsafetynam@gmail.com

**ATTENDANCE LIST – RETAIL/RESTAURANTS – 27 APRIL 2011**

<b>NAME</b>	<b>COMPANY</b>	<b>CELL NO</b>	<b>E-MAIL</b>
Elize Wiese	Bauern Stube Restaurant	0817111020	hantiejansen@mweb.com.na
J. Rechter	The Gourmet Restaurant	0811246945	<a href="mailto:t.crechter@gmail.com">t.crechter@gmail.com</a>
Arno Malan	Shoprite Checkers	0812462842	<a href="mailto:amalan@shoprite.co.za">amalan@shoprite.co.za</a>
David Knitter	GIZ	0814005252	david.knitter@giz.de
Diana van Schalkwyk	FoodChainSolutions	0811273020	foodsafetynam@gmail.com

**ATTENDANCE LIST – GOVERNMENT - 29APRIL 2011**

<b>NAME</b>	<b>MINISTRY/INSTITUTION</b>	<b>CELL NO</b>	<b>E-MAIL</b>
SakeusKapenda	MTI	081124????	kapenda@mti.gov.na
Mooyltamala	MOHSS	0813670808	mooyni@gmail.com
Alisa Jacob	MAWF	0812168990	jacoba@mawf.gov.na
Lorna Kuvare	NSI	0811229986	Shikongo-kuvarel@nsi.com.na
Yvonne Hemberger	MAWF-DVS	0811249407	dryvonne@iway.na
Daniel Kehrer	GIZ	0814240873	daniel.kehrer@giz.de
David Knitter	GIZ	0814005252	david.knitter@giz.de
Diana van Schalkwyk	FoodChainSolutions	0811273020	foodsafetynam@gmail.com



**ATTENDANCE LIST – ACADEMIC INSTITUTIONS/NGOs – 9 MAY 2011**

<b>NAME</b>	<b>COMPANY</b>	<b>CELL NO</b>	<b>E-MAIL</b>
Konrad Uebelhoer	MET/GIZ BSLM	0811286625	Konrad.uebelhoer@giz.de
Albert Tjihero	Polytechnic	0813672439	smbai@polytechnic.com.na
Chinemba Samundengu	UNAM-NEUDAMM	0812896667	csamundengu@unam.na
David Knitter	GIZ	0814005252	David.knitter.giz.de

## ATTENDANCE LIST – PRODUCERS – 10 MAY 2011

NAME	MINISTRY/INSTITUTION	CELL NO	E-MAIL
Eckart Basson	Farmer	081 419 7700	<a href="mailto:bassone@iway.na">bassone@iway.na</a>
Harald Marggraaf	NAU	061-237833	<a href="mailto:meat@agrinamibia.com.na">meat@agrinamibia.com.na</a>
Abraham Rietz	!NOB Conservancy	081 430 9970	NONE
J J Jansen	SNAFU	081 273 4692	NONE
Ronel Rademeyer	Agriforum	081 127 8159	<a href="mailto:news@agrinamibia.com.na">news@agrinamibia.com.na</a>
Pintile Davids	RISE Namibia	081 129 3329	<a href="mailto:pintiledavids@yahoo.com">pintiledavids@yahoo.com</a>
U Ritter	Farmer	081 129 4422	<a href="mailto:u.ritter@intersana-na.com">u.ritter@intersana-na.com</a>
R D Ritter	Farmer/Processor	081 244 1894	<a href="mailto:woltemad@iway.na">woltemad@iway.na</a>
David Knitter	GIZ	081 400 5252	<a href="mailto:David.knitter@giz.de">David.knitter@giz.de</a>

**ATTENDANCE LIST – GAME HARVESTERS – 26 MAY 2011**

<b>NAME</b>	<b>COMPANY</b>	<b>CELL NO</b>	<b>E-MAIL</b>
LouwtjieOpperman	Nossob Culling Team	0811291628	lopperman@pennypinchers.co.za
AlmutKronsbein	NAPHA	0811288749	ceonapha@mweb.com.na
Wittes Marais	Mos-Mar Harvesting team	0812425161	leana@mweb.com.na
Franscois Marais	Suidwes Culling	0811275447	franscois.m@mwebb.com.na
David Knitter	GIZ	0814005252	<a href="mailto:david.knitter@giz.de">david.knitter@giz.de</a>
Daniel Kehrer	GIZ	0814040873	daniel.kehrer@giz.de

## ATTENDANCE LIST – ACADEMIC INSTITUTIONS/NGOs – 9 JUNE 2011

NAME	COMPANY	CELL NO	E-MAIL
Konrad Uebelhoer	MET/GIZ BSLM	0811286625	konrad.uebelhoer@giz.de
Greg Stuart-Hill	WWF	0812054508	gstuart@wwf.na
Wallie Roux	WR Research Consultancy	0812882626	wallie@mweb.com.na
David Knitter	GIZ	0814005252	david.knitter.giz.de
TheofilusShiimi	Polytechnic of Namibia	0812747924	tshiimi@polytechnic.edu.na
SalomoMbai	Polytechnic of Namibia	0811461218	smbai@polytechnic.edu.na

**ATTENDANCE LIST – PROCESSORS – 14 JUNE 2011**

<b>NAME</b>	<b>MINISTRY/INSTITUTION</b>	<b>CELL NO</b>	<b>E-MAIL</b>
Solomon Nemaire	Brugarros Meat Processors	0811245356	Solomon@bmp.com.na
Fanie du Plessis	HARTLIEF CORPORATION	0811270015	<a href="mailto:nsduplessis@mweb.co.za">nsduplessis@mweb.co.za</a>
Diana van Schalkwyk	FoodChainSolutions	0811273020	foodsafetynam@gmail.com

**ATTENDANCE LIST – GOVERNMENT – 15 JUNE 2011**

<b>NAME</b>	<b>MINISTRY/INSTITUTION</b>	<b>CELL NO</b>	<b>E-MAIL</b>
K. Magwedere	Agriculture – DVS	0812931927	gwedas@yahoo.co.uk
S. Kapenda	MTI	0911487844	kapendasakeus@yahoo.co.uk
N. Itula	MTI	0811240991	iitula@mti.gov.na
David Knitter	GIZ	0814005252	david.knitter@giz.de
Lorna Kuvare	NSI	0811229986	shikongo-kuvarel@nsi.com.na

**ATTENDANCE LIST – PRODUCERS–20 JUNE 2011**

<b>NAME</b>	<b>INSTITUTION</b>	<b>TEL/CELL NO</b>	<b>E-MAIL</b>
Annatjie du Preez	Namibia Agricultural Union	061-237838	annatjie@agrinamibia.com.na
RianGariseb	Gaingu Conservancy	0812291604	P.O.Box 5223 Swakopmund
Karl Noibab	Tsiseb Conservancy	0812188325	n/a
J Jansen	Namibia National Farmers Union Southern National Farmers Union	0812734692	P.O.Box 1569 Keetmanshoop
Nadine Faschina	Namibia Nature Foundation/GIZ	0812086993	nadine.faschina@giz.de
B.R.D. Ritter	Bon Appetite	0812441894	woltemade@iway.na
David Knitter	GIZ	0814005252	David.knitter@giz.de

**ATTENDANCE LIST – RETAIL/RESTAURANTS – 27 JUNE 2011**

<b>NAME</b>	<b>COMPANY</b>	<b>CELL NO</b>	<b>E-MAIL</b>
Elize Wiese	BauernStube Restaurant	0817111020	hantiejansen@mweb.com.na
Arno Malan	Shoprite Checkers	0812462842	<a href="mailto:amalan@shoprite.co.za">amalan@shoprite.co.za</a>
David Knitter	GIZ	0814005252	david.knitter@giz.de
Diana van Schalkwyk	FoodChainSolutions	0811273020	foodsafetynam@gmail.com



<b>Game meat value chain promotion 20 July 2011</b>			
<b>Attendance list</b>			
<b>Name</b>	<b>Company/Institution</b>	<b>Cell no.</b>	<b>Mail</b>
Almut Kronsbein	NAPHA	0811288749	<a href="mailto:ceonapha@mweb.com.na">ceonapha@mweb.com.na</a>
Absalom Shigwedha	Freelance Journalist	0812950963	<a href="mailto:absalom.shigweda@gmail.com">absalom.shigweda@gmail.com</a>
Annatjie du Preez	Namibia Agricultural Union	061-237838	<a href="mailto:annatjie@agrinamibia.com.na">annatjie@agrinamibia.com.na</a>
Arno Malan	Shoprite Checkers	0812462842	<a href="mailto:amalan@shoprite.co.za">amalan@shoprite.co.za</a>
Bonifatios Tjaritje	Farmer	0812746072	<a href="mailto:btjaritje@gmail.com">btjaritje@gmail.com</a>
Chris Weaver	WWF	0812597420	<a href="mailto:cweaver@wwf.na">cweaver@wwf.na</a>
Clemencia Jacobs	Namibia Economist	0813618192	<a href="mailto:understudy@economist.com.na">understudy@economist.com.na</a>
Daniel Kehrer	GIZ	0814240873	<a href="mailto:daniel.kehrer@giz.de">daniel.kehrer@giz.de</a>
David Knitter	GIZ	0814005252	<a href="mailto:david.knitter@giz.de">david.knitter@giz.de</a>
Diana van Schalkwyk	FoodChainSolutions	0811273020	<a href="mailto:foodsafetynam@gmail.com">foodsafetynam@gmail.com</a>
Earish Kavikauriua	NBC news	0812978822	<a href="mailto:ekavikariua@nbc.com.na">ekavikariua@nbc.com.na</a>
Ellainie Smit	Namibia Sun	0812050518	<a href="mailto:ellanie@namibian.sun.com">ellanie@namibian.sun.com</a>
F Mbendeka	NBC-TV	0812854000	<a href="mailto:fbendeka@yahoo.com">fbendeka@yahoo.com</a>
Franscois Marais	Suidwes Culling	0811275447	<a href="mailto:franscois.m@mweb.com.na">franscois.m@mweb.com.na</a>
Greg Stuart-Hill	WWF	0812054508	<a href="mailto:gstuart@wwf.na">gstuart@wwf.na</a>
H Tjikurunda	MET/DSS	0812835685	<a href="mailto:htjikurunda@met.na">htjikurunda@met.na</a>
Hans Bloodstaan	!Khub-!Naub Conservancy	0813735670	None

I Mbahe	NBC Radio	0813026619	<a href="mailto:imbahe@nbc.com">imbahe@nbc.com</a>
Ingeline Katjingisia	WWF	0814183455	<a href="mailto:ikatjingisia@cdss.com.na">ikatjingisia@cdss.com.na</a>
Irene Baas	New Era	0812553606	<a href="mailto:irene@newera.com">irene@newera.com</a>
J Jansen	Namibia National Farmers Union	0812734692	P.O.Box 1569 Keetmanshoop
Karl Noibab	Tsiseb Conservancy	0812188325	None
Kauna Schoeder	MET/DEA	0811461218	<a href="mailto:kauna@met.na">kauna@met.na</a>
Kuda Magwedere	Agriculture – DVS	0812931927	<a href="mailto:gwedas@yahoo.co.uk">gwedas@yahoo.co.uk</a>
Lesley Kauendara	Gobabis communal farmers	0811147724	<a href="mailto:siroulesm@gmail.com">siroulesm@gmail.com</a>
Lesley Tjongarere	!Gaingu Conservancy	0812116291	<a href="mailto:LesleeSCDA@yahoo.com">LesleeSCDA@yahoo.com</a>
Lorna Kuvare	NSI	0811229986	<a href="mailto:shikongo-kuvarel@nsi.com.na">shikongo-kuvarel@nsi.com.na</a>
Louwtjie Opperman	Nossob Culling Team	0811291628	<a href="mailto:lopperman@pennypinchers.co.za">lopperman@pennypinchers.co.za</a>
Monja Viljoen	Agriforum	0811278159	<a href="mailto:news@agrinamibia.com.na">news@agrinamibia.com.na</a>
N. Itula	MTI	0811240991	<a href="mailto:iitula@mti.gov.na">iitula@mti.gov.na</a>
N. Shigweda	UNAM	0812456463	<a href="mailto:nshigwedha@unam.na">nshigwedha@unam.na</a>
Nadine Faschina	Namibia Nature Foundation/GIZ	0812086993	<a href="mailto:nadine.faschina@giz.de">nadine.faschina@giz.de</a>
Nickey Gaseb	Tsiseb/SGP UNDP	0812615854	<a href="mailto:nickeyg@unops.org">nickeyg@unops.org</a>
Pearl Coetzee	NAMPA	0812281160	<a href="mailto:pcoetzee@nampa.org">pcoetzee@nampa.org</a>
Rian Gariseb	Gaingu Conservancy	0812291604	P.O.Box 5223 Swakopmund
Salomo Mbai	Polytechnic of Namibia	0811461218	<a href="mailto:smbai@polytechnic.edu.na">smbai@polytechnic.edu.na</a>
Sanet de Waal	Republikein	061-2472064	<a href="mailto:sanet@republikein.com.na">sanet@republikein.com.na</a>
SiegfriedTjitjo	MET	0812126447	<a href="mailto:siegfriedtjitjo@gmail.com">siegfriedtjitjo@gmail.com</a>

Simeon Negumbo	MET	0811282281	<a href="mailto:snegumbo@met.na">snegumbo@met.na</a>
Theofilus Shiimi	Polytechnic of Namibia	0812747924	<a href="mailto:tshiimi@polytechnic.edu.na">tshiimi@polytechnic.edu.na</a>
Wallie Roux	WR Research Consultancy	0812882626	<a href="mailto:wallie@mweb.com.na">wallie@mweb.com.na</a>
Werdus Smith	Koës Culling Team	0814147816	<a href="mailto:werdus@iway.na">werdus@iway.na</a>
Wilfried Pack	Canam	0812456463	None
Yvonne Hemberger	MAWF-DVS	0811249407	<a href="mailto:dryvonne@iway.na">dryvonne@iway.na</a>

**Annex 2: Agendas Round 1, 2, and synthesis workshop**

**GAME MEAT STAKEHOLDER CONSULTATION**  
**UPGRADING OF THE GAME MEAT VALUE CHAIN**  
**AGENDA FOR ROUND 1 OF 2**

1. Welcoming remarks
2. Attendance list
3. Overview – game meat industry
4. Value Chain(VC) Promotion
5. Clarification of role of VC actors
6. Quantification of VC
7. Needs/Constraints/Opportunities
8. Vision and strategy for VC upgrading
9. Way forward
10. Evaluation of meeting
11. Closure

**GAME MEAT STAKEHOLDER CONSULTATION**  
**UPGRADING OF THE GAME MEAT VALUE CHAIN**  
**AGENDA FOR ROUND 2 OF 2**  
**HOTEL THULE**

1. Welcoming remarks
2. Attendance list
3. Feedback and results matrix – round 1
4. Value chain upgrade (vision & strategy)
5. Detailing value chain promotion
6. Way forward
7. Closure

# Agenda

## Game Meat Value Chain Promotion

20 July 2011

Hotel Thule

Time	Agenda Item	Presenter
08h30	Registration	
<b>Launch of TRAFFIC Study</b>		
09h00	Welcoming remarks	MET
09h05	Opening speech	German Embassy
09h15	TRAFFIC study	Peter Lindsey
09h45	Questions	All
10h00	Closing Remarks	WWF
10h30	Coffee/Tea	
<b>Game Meat Value Chain Promotion – Synthesis of Stakeholder Consultations</b>		
11h00	Feedback stakeholder meetings	Diana van Schalkwyk
12h00	Value chain promotion – Association	All
12h55	Concluding remarks (if session can be finalized, if not discussion continues and concluding afterwards)	GIZ
13h00	Lunch	

**Annex 3: Presentations**



**GAME MEAT STAKEHOLDER  
CONSULTATIONS IN NAMIBIA –  
DEVELOPMENT OF A VALUE CHAIN  
UPGRADING STRATEGY  
ROUND I**



Diana L van Schalkwyk  
April 2011

**AGENDA POINT 3**

**OVERVIEW OF THE  
NAMIBIAN GAME MEAT INDUSTRY**

**NAMIBIAN GAME MEAT INDUSTRY**

- ✘ Utilization of game meat linked to Article 95 of National Constitution
- ✘ Vision 2030 aims to ensure biodiversity conservation and sustainable utilization
- ✘ Freehold farmers - rights over wildlife 1967  
Communal farmers - same rights in 1996



**WILDLIFE UTILIZATION IN NAMIBIA**

- ✘ Namibia – abundance of wildlife - 2 million head roughly similar to the number of cattle, or sheep or goats
- ✘ Tourism, live sales & trophy hunting – cannot alone sustain growth
- ✘ Trophy hunting only removes 1% of wildlife herd



**SPECIES SUITABLE FOR COMMERCIAL HARVESTING**

Species	Numbers
Springbok ( <i>Antidorcas marsupialis</i> )	731 563
Gemsbok ( <i>Oryx gazella</i> )	388 411
Kudu ( <i>Tragelaphus strepsiceros</i> )	351 893
Red hartebeest ( <i>Alcelaphus buselaphus</i> )	125 088
Eland ( <i>Tragelaphus oryx</i> )	37 216
Mountain zebra ( <i>Equus hartmannae</i> )	72 736
	(Barnes et al., 2009)

**WILDLIFE MANAGEMENT IN NAMIBIA**



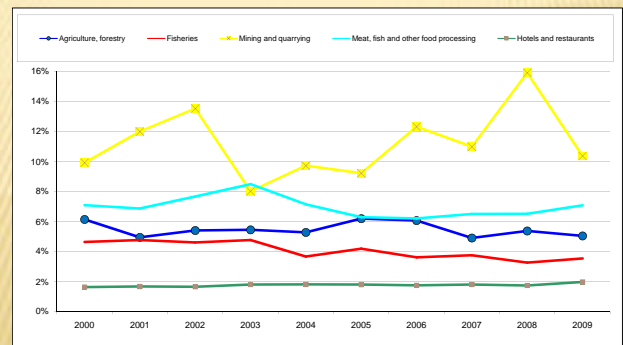
- ✘ 41% of Namibia under wildlife management;
- ✘ 90% of game located outside protection areas;
- ✘ 80% of the number of larger game species on private farms comprising 44% of Namibia

## ECONOMIC CONTRIBUTION

- ✘ Tourism and wildlife use second biggest contributor to Namibian GDP
- ✘ In terms of income to landowners/conservancies – game meat market revenue income of about N\$ 219 million
- ✘ If the value of the multiplier effect of 1.86 is taken into account – worth N\$ 500 million per annum

## STRUCTURE OF THE NAMIBIAN ECONOMY

Klaus.e.schade@gmail.com 24 Aug 2010



8

## GAME MEAT - ALTERNATIVE RED MEAT

- ✘ Demand for game meat increases locally and internationally
- ✘ However, competes with other red meats
- ✘ Competitive advantage < 3% fat; organic; high in polyunsaturated fatty acids; high protein content energy value < 500 kJ / 100 g
- ✘ **Question – why is game meat still an underutilized red meat source?**



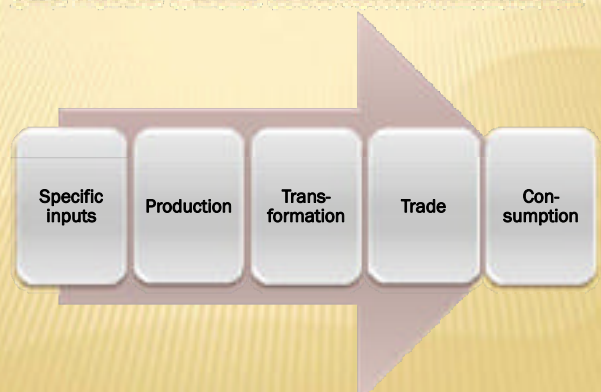
## AGENDA POINT 4

### VALUE CHAIN PROMOTION

## WHAT IS A VALUE CHAIN?

- Sequence of related business activities
- From the provision of specific inputs for a particular product
- To primary production, transformation, marketing, up to final consumption

## THE VALUE CHAIN MAP (AGRI-BUSINESS)



## IMPORTANCE OF VALUE CHAINS

- × Industries and markets get organised
  - + Why? Commercial relations are subject policies and regulations often embedded in social networks
- × Value chain integration is on the rise
  - + Why? Costs are reduced through logistics
  - + Quality is improved through standards
  - + New opportunities for small scale suppliers

## BENEFITS OF THE VALUE CHAIN APPROACH



## BENEFITS OF THE VALUE CHAIN APPROACH

- × Economic viability/sustainability – Funding of services (public & private) from VC income
- × Creation of linkages – Increased co-operation between actors (synergies)
- × Co-ordination of private and public roles – entrepreneurial development
- × Self-reliant development – focus on own initiatives

## THE “VALUE-LINKS” CONCEPT

- × Toolbox for value chain analyses
  - + Mapping
  - + Quantification
  - + Economic analysis
- × Value chain upgrading strategy



## EXERCISE

Mapping of the game meat value chain





## AGENDA POINT 5

### CLARIFICATION OF ROLE OF ACTORS

## AGENDA POINT 6

### QUANTIFICATION OF THE VALUE CHAIN

## AGENDA POINT 7

### NEEDS/CONSTRAINTS/OPPORTUNITIES

(Pin board exercise)

## LEAD QUESTIONS

- What are the reasons for the VC to stagnate at the different functions?
- Which gaps exists between the requirements derived from the market and the current structure and performance?
- Which constraints reduce the competitiveness of the poor producers?
- Which opportunities arise at the different VC functions?

## AGENDA POINT 8

### VISION AND STRATEGY FOR VC UPGRADING

## WHERE DO WE WANT TO BE IN 5 YEARS?



# GAME MEAT STAKEHOLDER CONSULTATIONS IN NAMIBIA – DEVELOPMENT OF A VALUE CHAIN UPGRADING STRATEGY (GIZ PROJECT)



## ROUND 2

Dr Diana L van Schalkwyk  
May 2011

## REVIEW – FIRST ROUND

- ✘ Overview of Namibian Game Meat Industry
- ✘ Value Chain Analysis
  - ✘ Mapping
  - ✘ Role of actors (micro & meso/macro)
  - ✘ Quantification
- ✘ Needs & constraints & opportunities
- ✘ Touched on ideas for Vision & Strategy

## RESULTS MATRIX - FIRST ROUND

Producers	Harvesters	Processors	Retailers/ Restaurants/ Butcheries	Government	NGOs
<b>Knowledge / Awareness</b>					
Sharing of information between		actors, e.g. Database, market intelligence			
Create awareness of game meat		amongst consumers, e.g. preparations of game meat/cooking methods, health/wellness attributes			
				Economic/market analyses	
Research on questions specific for the different VC functions					

## RESULTS MATRIX - FIRST ROUND

Producers	Harvesters	Processors	Retailers/ Restaurants/ Butcheries	Government	NGOs
<b>Formalisation of value chain</b>					
Lack of infrastructure, e.g. processing facilities		Sufficient infrastructure			
Establishment of <b>body</b> (Game Meat Association) to coordinate a shared responsibility in value chain, harmonise VC actions and promote game meat industry (strategy and action plan)					
Address <b>informal market</b> practices and incorporate biltong hunters and communal conservancies in VC					

## RESULTS MATRIX - FIRST ROUND

Producers	Harvesters	Processors	Retailers/ Restaurants/ Butcheries	Government	NGOs
<b>Regulatory framework</b>					
Amend, revise, simplify, implement and comply with <b>regulations</b> (e.g. harvesting quota, permit system (e.g. night culling permits), health/hygiene codes, local consumer protection act etc.)					
Increase <b>staff at MET</b> (e.g. for farm inspections) and efficiency of government services for proper			resource management and to support business		
<b>Bush encroachment</b>					

## RESULTS MATRIX - FIRST ROUND

Producers	Harvesters	Processors	Retailers/ Restaurants/ Butcheries	Government	NGOs
<b>Prices/Products</b>					
Address <b>price differences</b> (→ stability) between consumers and gap			between producer & consumer		(e.g. Exchange rate, distribution, etc.)
Producer prices too low (=C-grade beef)		Game meat should be cheaper than C-grade beef			
New business opportunities, e.g.		marketing, branding of quality (value addition), maximization of carcass yields per ha, diversification of products (e.g. large game) and markets			
Huge interest from purchasers in EU		Competition of farmed game overseas - low interest		Local market not saturated, increase local use of game meat	

## VISION - UPGRADING GAME MEAT VALUE CHAIN

- ✘ Why engage in visioning?
- ✘ Visioning focus on the opportunities
- ✘ Vision provides strategic direction (how should the chain look five years from now?)
- ✘ Visioning is the basis for consensus

## VISION FOR UPGRADING

Increase value = price obtained \* volume sold



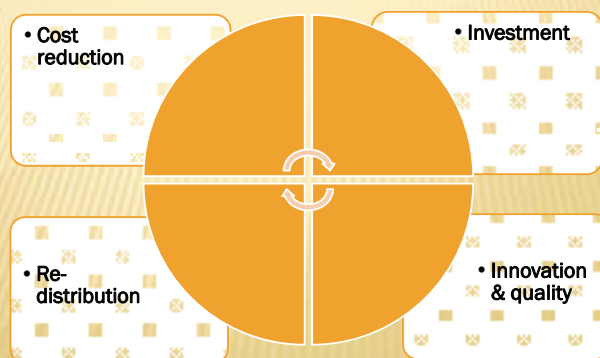
## FROM THE PREVIOUS ROUND.....

- ✘ Sustainable industry.....
- ✘ Integrated value chain/structured value chain..
- ✘ Efficient and competitive value chain.....
- ✘ High quality products.....
- ✘ Namibian game meat brand.....
- ✘ Double the numbers of game harvested.....
- ✘ Incorporate communal conservancies.....
- ✘ Consistency of supply and quality.....
- ✘ Conducive environment for business.....

## CLASSIFYING STRATEGIES

<i>Ansoff matrix</i>	Current products	New products
Current markets	Market penetration strategy	Product development strategy
New markets	Market development strategy	Product diversification strategy

## HOW?



## VALUE CHAIN PROMOTION

- ✘ Game Meat Association – identified as priority
- ✘ How should this body look like?
  - + Structure (members, leadership etc.)
  - + Funding (fees)
  - + Operations (meetings, objectives/priorities, action plans etc.)

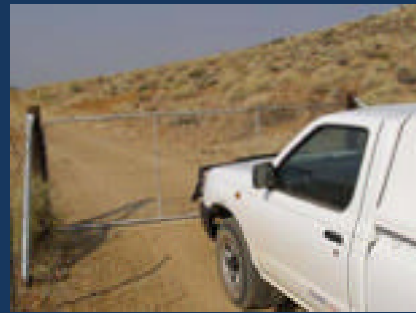
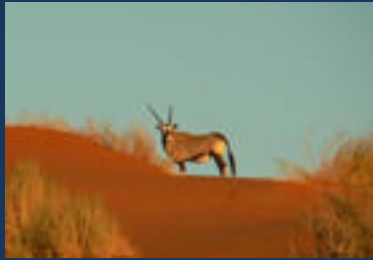
## WAY FORWARD

- ✦ Stakeholder meeting with all value chain actors
- ✦ Constitution meeting of game meat association

## Wildlife-based land uses on freehold land in Namibia: linkages with food security

P. Lindsey

TRAFFIC southern/East Africa



We surveyed 250 farmers, during 2009

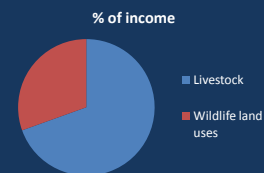
These farmers collectively managed 412 farms, or ~11.8% of the total

Primary land use on commercial farms in Namibia



## Livestock farming

- Livestock is still the most commonly practised land use (92% of farmers) and generates most of farmers' income:



## Notable correlates of livestock production..

- % of income derived from livestock was greater among older farmers (F Ratio=3.69, d.f.=8,  $p<0.001$ ).
- % of farmers' income from livestock farming was negatively correlated with employment levels (F Ratio 18.1, d.f.=7,  $p<0.001$ ).

## Wildlife-based land uses (WBLUs)

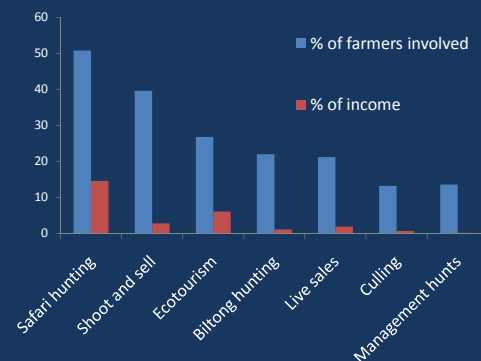
- Increasing in prevalence (288,000 km<sup>2</sup> used for WBLU, 32,000 km<sup>2</sup> used exclusively for WBLU)
- 80% of farmers derive some income from WBLUs





- Notable correlates of wildlife-production..
- % income from WBLU was higher among younger farmers (F Ratio=14.4, *d.f.*=2,  $p<0.001$ ).
- There was a positive relationship between the % income from WBLU and employment (F Ratio 18.1, *d.f.*=7,  $p<0.001$ )
- There was a positive relationship between the biomass of wildlife and employment (F Ratio 18.1, *d.f.*=7,  $p<0.001$ ).

### Safari hunting the most important form of WBLU:



### Economic value of wildlife-based land uses

- Livestock production on freehold land contributes N\$1.97 billion [USD233 million] to Gross National Income (GNI)
- Wildlife and tourism generate at least N\$1.4 billion (USD166 million) (Barnes et al. 2010)
- Since then (Barnes's data were from 2004), safari hunting has expanded by at least 36% and ecotourism by 24% and the value of game meat was underestimated

### Wildlife biomass is an efficient means of generating revenue..

- Wildlife comprises 29.4% of mammalian biomass on freehold land
- If one combines income from livestock, tourism and wildlife on freehold land, and looks at income generated per % of mammalian biomass:
  - Wildlife generates or 1.41% revenue per 1% of mammalian biomass
  - Livestock generates 0.83% revenue per 1% of mammalian biomass

### Freehold conservancies



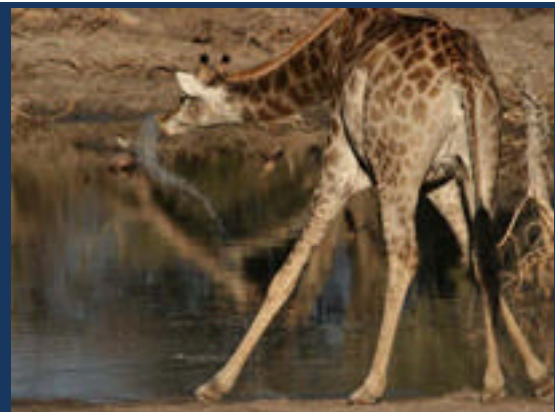
25 commercial conservancies, comprise 1008 farms and cover ~43 250 km<sup>2</sup> (Erb 2004)

- In conservancies:
- Livestock less important
  - WBLU more prominent
  - Wildlife diversity and abundance higher
  - Wildlife populations are more likely to be increasing inside conservancies..

However –

Conservancies are fractured not recognized by government

Source: CANAM



Patterns in wildlife abundance, diversity and population trends on Namibian farmlands

## Factors related to wildlife diversity

Wildlife diversity was:

- Higher in conservancies
- Negatively related to income from livestock
- Positively related to income from safari hunting
- Negatively related to farmer age
- Negatively related to a farm's distance from the nearest town

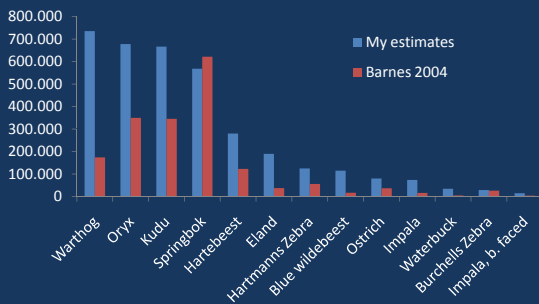
(F Ratio=11.7, d.f.=14,  $p < 0.001$ ).

## Trends in wildlife..

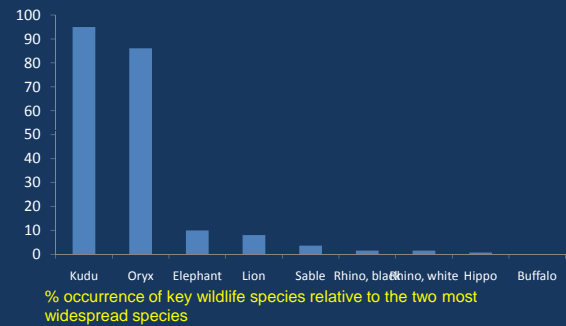
- There have been general increases in:
  1. Wildlife biomass
    - 1972 – 8%
    - 1992 – 18%
    - 2009 – 29%
  2. Diversity
  3. Wildlife populations



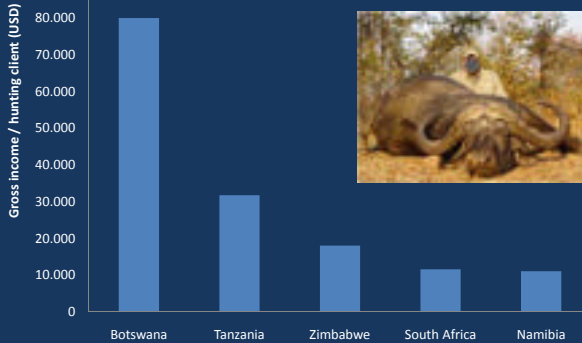
## Wildlife populations may be higher than previously thought



However, large and valuable wildlife is still rare on farm lands – which reduces potential returns



## Approx gross returns generated per safari hunting client



Namibia has the lowest returns per safari hunting client in the SADC region due to the lack of 'big game' and most significantly buffalo on freehold land

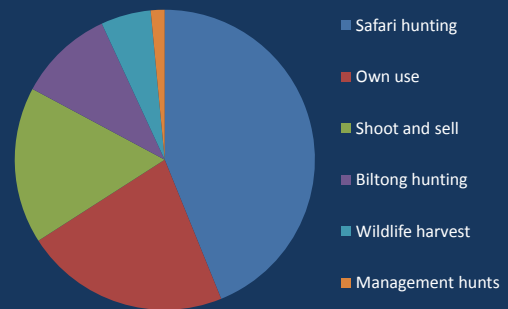
Trophy hunts involving big game are 4-12 times more valuable than those of plains game...

Species	Daily rates	Trophy fee	Total
Plains game	78,000	40,000	118,000
Buffalo	98,000	42,000	140,000
Leopard	105,000	35,000	140,000
Elephant	125,000	112,000	238,000
Lion	273,000	161,000	434,000

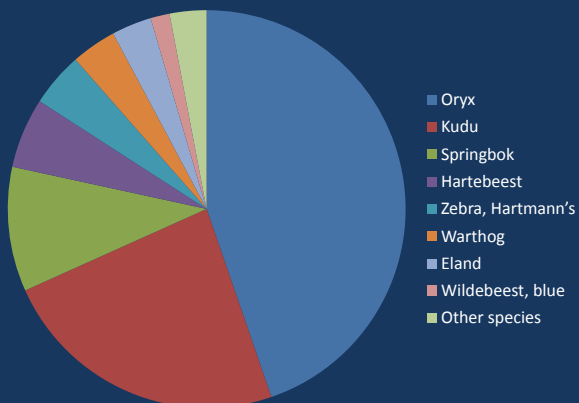
## Game meat production on freehold farms



## Source of game meat (type of hunting)..



## Source of game meat (species..)



## More game meat is produced on freehold land than previously recognized

Approximately 15-22 million kg of game meat is produced annually on freehold land

Unlike meat from domestic stock (87% of which is exported), most (~99%) game meat remains within Namibia

Consequently - more meat from wildlife stays in Namibia than meat from domestic stock: 15-22 million c.f. 12 million kg

## Prices of meat (2009 data)

	N\$/kg paid to farmers
Game meat sold as carcasses	15.4
Game meat sold as unselected cuts	17.3
Beef	20.5
Lamb	21

- The price of game meat obtained by farmers has gone up by 45% in the last 2-3 years
- Prices obtained by farmers for game meat are lower than for livestock
- However, the price of game meat in stores is higher than for meat from domestic stock

## Value addition through processing or export

- Selected cuts – N\$31.2 / kg obtained by farmers
- Processed meat – N\$53 / kg achieved by farmers - (taking into account drying and loss of mass)
- Export – meat companies distributing to the EU obtained N\$80-120 / kg (D. Van Schalkwyk pers comm)

### Game meat is far more important in economic terms than previously recognized

- ~N\$177 million/year, (40x more than previously recognized (\$4.5 million Barnes et al. 2009))
- Earnings could be much higher if a greater proportion of game meat was exported (full exploitation of export potential could generate an additional \$440 million/year)

### Game meat is widely used for workers' rations...

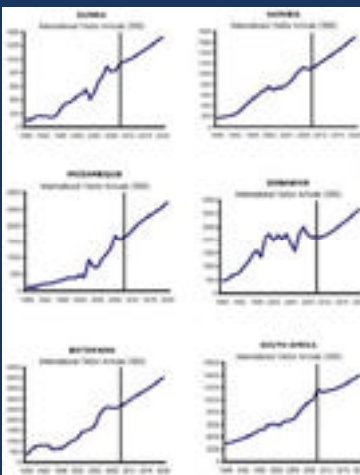
- Major source of protein for agricultural workers as rations..
- Workers receive an average of 4.4 kg of game meat per week, and 2.2 kg of meat from domestic stock as rations
- Equates to ~5.3 million kg of game meat as rations per year, supporting ~22,800 workers (and potentially >44,000 people assuming family members benefit from meat)

### Wildlife-based land uses contribute to food security in multiple ways

- Through the generation of foreign currency
- The generation of high levels of employment
- The generation of significant quantities of protein consumed locally
- Diversification of income, and reduced reliance on rainfall

### Several factors suggest that WBLU may continue to increase in prevalence:

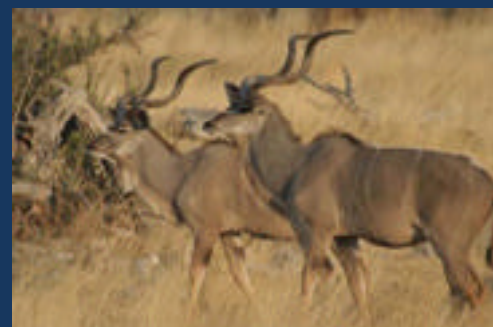
- WBLU more popular among younger farmers
- Livestock farming is predicted to be affected 60% more by climate change than WBLU (Turpie et al. 2010)
- Wildlife is becoming increasingly scarce elsewhere
- Projected increases in tourist and hunter arrivals (notwithstanding recent dips due to the global recession)



Tourist arrivals to Namibia  
Are expected to increase  
By 6.1%/year in the next  
10 years

(WTTC 2010)

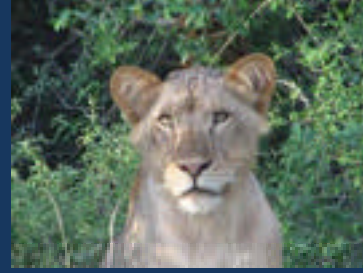
However, for the potential of wildlife-based land uses on freehold in Namibia to be fulfilled, there is a need for a number of changes:



## 1. Measures to permit reintroduction of the full range of wildlife species

Where the 'big five' are present....

- Ecotourism operations can charge at least 2 times (and often much) more
- Returns from safari hunting are many times higher
- Land values up to six times higher



To facilitate big game reintroductions, two key changes are needed:

- i. Promoting the practise of WBLU on appropriate scales
- ii. More flexible approaches to veterinary control

### i. Practising WBLU on appropriate scales: developing fully functional conservancies

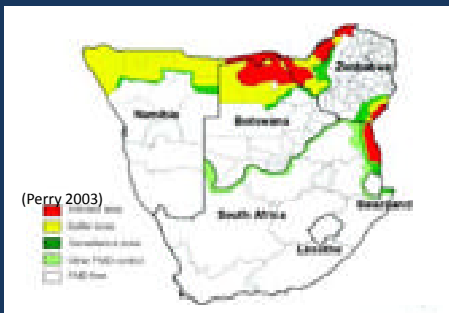
- Large fully functional conservancies confer many ecological, social and financial benefits
- Most importantly:
- They permit the reintroduction of large, high value species, permitting high-return ecotourism or trophy hunting, which creates more employment and is less reliant on rainfall
- They provide greater scope for achieving successful wildlife-based land reform (to be discussed shortly..)

At the moment there is no real recognition of commercial conservancies, and permitting policies favour fenced, isolated ranches rather than large open systems

### To promote the practise of WBLU on appropriate scales there needs to be:

- Understanding among policy makers of the advantages of fully-formed conservancies
- Clear legal recognition of conservancies
- More complete devolution of user rights to landowners in conservancies
- Disincentives for the fencing of individual ranches

### ii. A re-think of veterinary control strategies



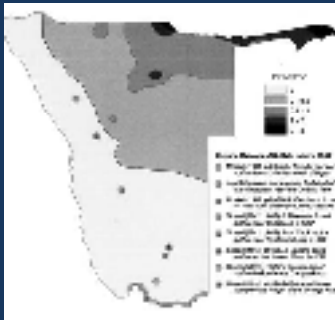
Current veterinary control strategies greatly reduce potential earnings from WBLU on freehold land (and in communal conservancies) by precluding the reintroduction of buffalo..

Buffalo are the single most important species for safari hunting



There is huge scope for buffalo reintroductions in Namibia:

Historically, buffalo occurred widely in Namibia in areas with >250 ml of rainfall



Martin 2005

### Possible alternative veterinary control strategies:

- 1. Permitting reintroduction of FMD-free buffalo
- 2. Shifting of veterinary boundaries
- 3. Compartmentalization to allow creation of wildlife and livestock production zones
- 4. Commodity based trade

However, at the moment all focus appears to be on entrenchment and expansion of current strategies

Given the potential and advantages of WBLU more flexible approaches to veterinary control should be considered – to allow for unfettered development of either WBLU, livestock or both – depending on market forces...

## 2. Achieving 'wildlife-based' land reform

- WBLUs not commonly practised by emerging farmers (they derive a mean of 1.6% of income from WBLUs, c.f. 30% for white farmers)
- However, there is a significant interest among black farmers in engaging in WBLU: (30.8% of black farmers were interested in removing all livestock and going for pure wildlife-ranching, compared to 20% of whites)

- Without active intervention, land reform may result in a shift from WBLUs to livestock

- There are two key barriers to integrating black farmers into WBLU:
  - i) The high start-up capital required
  - ii) the specialised skills required
- Commercial conservancies can play a huge role in integrating emerging farmers into WBLU...

## 3. Developing export markets for game meat

- Approximately 5.5 million kg of potentially exportable game meat is produced per year (from springbok, oryx, hartebeest, eland and impala through shoot and sell and culling) (potential earnings of N\$440 million/year)
- However, currently only 4.0% of exportable meat is exported, and most of that is to RSA..

## 4. Proper representation of the wildlife industry in Namibia

- Similar to.. Wildlife Ranching South Africa and the Wildlife Producers Association (in Zimbabwe)
- To give the wildlife industry a voice: at present the interests of the industry are rarely given the consideration they are due during policy discussion

## Conclusions

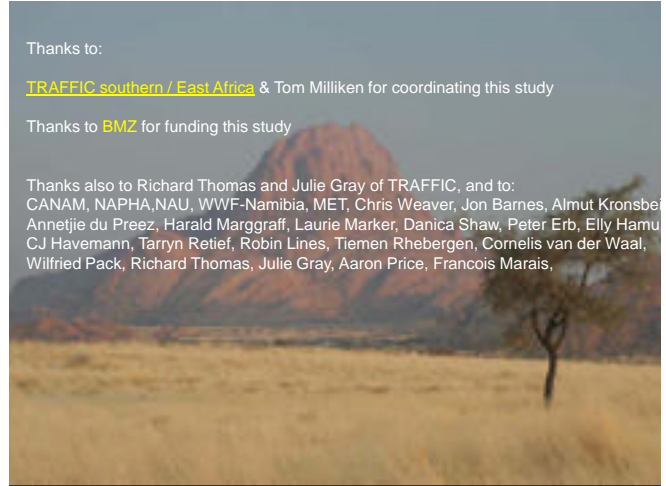
- WBLU are expanding rapidly and will play an increasingly important role in future
- WBLU generates significant food security benefits through meat provision, forex generation, employment and diversification of national income
- However, for the full potential of WBLU to be realised:
  - Legislation is required to recognize and promote fully-functioning conservancies
  - Integrating emerging farmers into the industry is key
  - A more flexible veterinary-control environment is needed

Thanks to:

[TRAFFIC southern / East Africa](#) & Tom Milliken for coordinating this study

Thanks to [BMZ](#) for funding this study

Thanks also to Richard Thomas and Julie Gray of TRAFFIC, and to: CANAM, NAPHA, NAU, WWF-Namibia, MET, Chris Weaver, Jon Barnes, Almut Kronsbein, Annetjie du Preez, Harald Marggraff, Laurie Marker, Danica Shaw, Peter Erb, Elly Hamu, CJ Havemann, Tarryn Retief, Robin Lines, Tiemen Rhebergen, Cornelis van der Waal, Wilfried Pack, Richard Thomas, Julie Gray, Aaron Price, Francois Marais.





**GAME MEAT STAKEHOLDER  
CONSULTATIONS IN NAMIBIA –  
DEVELOPMENT OF A VALUE CHAIN  
UPGRADING STRATEGY (GIZ PROJECT)**

**ROUND 3**

Dr Diana L van Schalkwyk  
July 2011



**REVIEW – FIRST ROUND OF DISCUSSIONS**

- × Overview of Namibian Game Meat Industry
- × Value Chain Analysis
  - × Mapping
  - × Role of actors (micro & meso/macro)
  - × Quantification
- × Needs & constraints & opportunities

**RESULTS MATRIX - FIRST ROUND**

× Knowledge/Awareness

- Sharing of information
- Awareness of game meat
- Research/economic analysis

**RESULTS MATRIX - FIRST ROUND**

× Formalisation of the value chain

- Infrastructure (Lack? Sufficient?)
- Establishment of a common body
- Informal market practices

**RESULTS MATRIX - FIRST ROUND**

× Regulatory frame work

- Revise/simplify regulations
- Increase efficiency of government services
- Address bush encroachment

**RESULTS MATRIX - FIRST ROUND**

× Investment incentives

- Availability of capital
- Cost/benefit analysis



### RESULTS MATRIX - FIRST ROUND

#### × Prices/products



- Price differences between producer & consumer prices

- New business opportunities (prices/products)

### REVIEW - SECOND ROUND OF DISCUSSIONS

#### × Vision



#### × Strategies

- × Ansoff model
- × Analysis amongst the value chain

#### × Ideas for the establishment of a common body

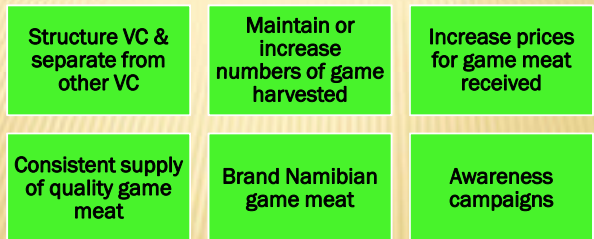
### VISION - UPGRADING GAME MEAT VALUE CHAIN

#### × Why engage in visioning?

- × Visioning focus on the opportunities
- × Vision provides strategic direction (how should the chain look five years from now?)
- × Visioning is the basis for consensus

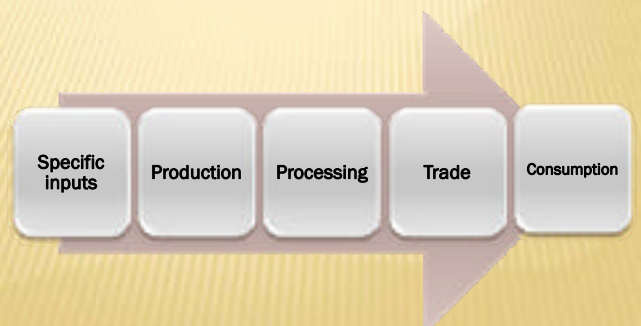
### RESULTS MATRIX - 2ND ROUND OF DISCUSSIONS

#### × Vision



Ansoff matrix	Current products	New products
Current markets	<b>Market penetration strategy</b> Increase volumes & prices in current markets Increase volumes of game meat sold to local markets	<b>Product development strategy</b> Include large game as export product Include chilled game as export product New value-added products
New markets	<b>Market development Strategy</b> Investigate/research new markets Create awareness in new markets	<b>Product diversification strategy</b> Game skins Game offal Other secondary businesses

### ANALYSIS AMONG THE VALUE CHAIN



**STRATEGIES (ANALYSIS AMONG VC) - INPUTS**

Create conducive environment for business

Clarify ownership of game

Protection of intellectual property

National game meat export policy

**STRATEGIES (ANALYSIS AMONG VC) - PRODUCTION**

National strategy for wildlife use

Sustainable harvesting

Use of experts in production process

Control numbers of game harvested per region

Incorporate communal conservancies in VC

**STRATEGIES (ANALYSIS AMONG VC) - PROCESSING**

Decentralize processing to remote areas

Regulation of standards by authorities

Increase efficiency of game processors

**STRATEGIES (ANALYSIS AMONG VC) - TRADE**

Branding of game meat

Consistency of supply of meat

Improve marketing and sales

**STRATEGIES (ANALYSIS AMONG VC) - CONSUMPTION**

Awareness campaigns

Consumer surveys on prices & products

**COMMON BODY**

SERVICES	MEMBERS	FUNDING	PROCEDURES
?	?	?	?

## BODY/ASSOCIATION – PROPOSED SERVICES

- Information dissemination
- Negotiation & facilitation
- Create awareness of game meat
- Promote best practices & standards
- Interaction with stakeholders

## PROPOSAL FOR FULL MEMBERS

Full  
members  
(with voting  
rights)

- Communal farmers
- Commercial/emerging farmers
- Game harvesters
- Game meat processors
- Retailers/Restaurants /Butcheries/Consumer bodies

## PROPOSAL FOR ASSOCIATED MEMBERS

Associated members (without voting rights)

- Ministry of Agriculture, Water and Forestry
- Ministry of Environment and Tourism
- Ministry of Trade and Industry
- Ministry of Health and Social Services
- NGOs

## PROPOSAL FOR FUNDING

### × Secretariat

- Offer from NSI to host an office
- Possible grant from MTI

### × Membership fees

- N\$ 500.00 annually  
(paid by full members)

## PROPOSAL FOR PROCEDURES

Management committee – one representative for every actor group (full members & associated members)

Quorum – 50% plus 1 (full members)

Annual General Meeting – elect members for Management Committee

Management Committee – elect Chairman

## WAY FORWARD

- × Task team to finalize constitution
- × Inaugural meeting of game meat association

**Annex 4: Speeches**





Ministry of Environment and Tourism

SPEECH BY MET AT THE OCCASION OF THE  
LAUNCH OF THE TRAFFIC STUDY ENTITLED “AN  
ANALYSIS OF GAME MEAT PRODUCTION AND  
WILDLIFE-BASED LAND USES ON FREEHOLD LAND IN  
NAMIBIA: LINKS WITH FOOD SECURITY” by P. Lindsey

and

THE GAME MEAT STAKEHOLDER CONSULTATION  
SYNTHESIS MEETING – UPGRADING OPTIONS OF THE  
GAME MEAT VALUE CHAIN AND GAME MEAT  
ASSOCIATION

WEDNESDAY 20 JULY 2011, HOTEL THULE, 8:30 h

Director of Ceremonies,  
Representatives of the MAWF, MET, MOHSS  
Private Sector,  
TRAFFIC, the originator of the Game Meat report  
NGOs,  
Distinguished Guests,  
Members of the Media,  
Ladies and Gentlemen:

I am very pleased to be present here today and be able to share with  
you the MET's view on the game meat sector.

As you might know, the MET's core task is to ensure the conservation  
and use of biological diversity, promoting nature resource-based

---

livelihoods, environmental management and tourism development through innovation and partnership in order to contribute to rural development and economic growth.

Having this in mind and if you think of your own experience, you can already imagine that the creation of a sustainable balance between *conservation* and *use* of nature's vital treasures is a tremendous challenge.

For this reason, I am happy to see this publication being done, because it encourages and guides us towards the *sustainable* use of nature's treasures in this sector and will help us as Namibians to valorize our resources.

Namibia is well-known for its high quality game meat and game meat products. Tourists often praise this attribute of Namibian game meat as it is regularly offered in the menus of restaurants, guest houses and lodges. The utilization of game meat is linked to Article 95 of the National Constitution, which states that "The State shall actively promote and maintain the welfare of the people by adopting, inter alia, policies aimed at the ... maintenance of ecosystems, essential ecological processes and biological diversity of Namibia and utilisation of living natural resources on a sustainable basis for the benefit of all Namibians, both present and future". In addition, Namibia's Vision 2030 aims to ensure biodiversity conservation and the sustainable utilization of the country's wildlife for economic benefits.

The game industry in Namibia is also regulated by the Ministry of Environment and Tourism through the Nature Conservation Ordinance no. 4 of 1975 as amended.

Namibia's freehold farmers have had ownership rights over land and livestock since the early 1900's, although the commercial rights over wildlife and indigenous plants had only been given to freehold farmers in 1967. Farmers in communal areas received the rights to utilize wildlife and benefit from tourism when policies and legislation were adopted to promote community-based natural resource management in 1996. The implementation of these policies resulted in wildlife being utilized and valued by the private sector, driving the wildlife sector into a rapid growth phase.



Namibia has a number of regulations that apply to the sustainable use of game which are applicable when harvesting game for commercial game meat production. Only harvesting teams registered with Directorate of Parks and Wildlife Management (DPWM) of the MET are allowed harvesting for the commercial export of game meat. The Team of the DPWM further supervises the harvesting teams regarding every operation.

Besides the routines, also the Ministry's strategic plan 2008-2012 contains a lot of activities considering the development of wildlife and also game in particular.

The Conservation benefits we reached so far include poaching being almost totally eliminated, expanding populations of all wildlife even including animals such as elephant, lion and black rhino and communities setting aside land for exclusive use of wildlife, and their benefit thereof.

Furthermore, the MET support to the Community Based Natural Resources Management (CBNRM) complements the nationwide efforts to create further value out of our resources.

Since the MET introduced the legislation to give conditional use rights over wildlife to registered conservancies in communal areas, many success stories have been written by various contributing organisations and individuals.

The increasing game numbers can bring still more benefits to the communal conservancies (19% of country surface, about 60 registered conservancies with 230,000 members today, 30 new ones in development). Income diversification will play an important role for the future success of this concept and we know that the commercial harvesting must not be in conflict with other uses.

So far the know-how of commercial harvesting of game for meat export remains in the Hands of a few people but the publication reminds us to get closer to each other in the sector and to think about a broader strategy for capacity development for all parties. Since we know, that the overall use of the game resources still amounts only about 16% of the potential off-takes and we know that the markets have much more absorption potential then satisfied at the moment, we are sure that

everybody will profit from capacity building measures which also help to increase the market in a whole.

I am sure, that every effort to support a sustainable development of the game meat sector will have a significant impact on our common goals to conserve nature and ensure development in appreciation of the fact that both goals are strongly connected with each other.

Now I should take the time to thank all parties, who contributed to the publication and the process of game meat value chain promotion:

Great appreciation goes to Peter Lindsey and TRAFFIC for realizing the study and all the individuals and organizations supporting it, including the WWF Namibia. For ongoing support to the facilitation of game meat value chain promotion, the team of the Biodiversity and Sustainable Land Management Project, implemented by the Ministry of Environment and Tourism together with the Deutsche Gesellschaft für Technische Zusammenarbeit (GIZ) should receive special thanks. Last but not least we highly appreciate that both, the publication and the facilitation would have not been possible without the kind funding of the German Federal Ministry for Economic Cooperation and Development (BMZ).

It is my hope, that all these actors will continue their support and that even more will join.

I thank you.



**Annex 5: Summaries of the consultation workshops**

Summarised

Color Code: Common issues with agreement

Common issues without agreement

SYNTHESIS OF GAME MEAT VALUE CHAIN NEEDS/CONSTRAINTS/OPPORTUNITIES

Producers	Harvesters	Processors	Retailers/Restaurants/Butcher	Government	NGOs
<b>Knowledge / Awareness</b>					
Sharing of information between		actors, e.g. Database, market intelligence			
Create awareness of game meat		amongst consumers, e.g. preparations of game meat/cooking methods, health/wellness attributes			
		Economic/market analyses			
Research on questions specific for the different VC functions					
Improve skills of VC actors through training and include game into tertiary curricula					
<b>Formalisation of value chain</b>					
Lack of infrastructure, e.g. processing facilities		Sufficient infrastructure			
Establishment of body (Game Meat Association) to coordinate a shared responsibility in value chain, harmonise VC actions and promote game meat industry (strategy and action plan)					
Address informal market practices and incorporate biltong hunters and communal conservancies in VC					
<b>Regulatory framework</b>					
Amend, revise, simplify, implement and comply with regulations (e.g. harvesting quota, permit system (e.g. night culling permits), health/hygiene codes, local consumer protection act etc.)					
Increase staff at MET (e.g. for farm inspections) and efficiency of government services for proper resource					
<b>Bush encroachment</b>					
<b>Investment Incentives</b>					
Availability of capital and financial incentives for value chain					
<b>Prices/Products</b>					
Address price differences (--> stability) between consumers and gap		producer & consumer (e.g. Exchange distribution, etc.)			
Producer prices too low (=C-grade beef)		Game meat should be cheaper than C-grade beef			
New business opportunities, e.g.		marketing, branding of quality (value addition), maximization of carcass yields per ha, diversification of products (e.g. large game) and markets			
Huge interest from purchasers in EU		Competition of farmed game overseas - low interest		Local market not saturated, increase local use of game meat	

Summarised  
SYNTHESIS OF GAME MEAT VALUE CHAIN VISION/STRATEGIES&COMMON  
BODY (ROUND 2)

Color Code:

Common issues with agreement

Common issues without agreement

Stand alone issues

Producers      Harvesters      Processors      Retailers/Restaurants/  
Butcheries      Government      NGOs

**Basic Value Chain Promotion Approach (Tool 1 - Ansoff matrix)**

**Market penetration strategy**

					Perception of game meat to change locally and RSA
					Seperate beef and game value chain
Prices of game meat to increase			Volume of game meat to increase		
			Prices of game meat = or >		
			Increased numbers of markets served locally		
	Market penetration with springbok				

**Market development**

Investigate new markets		Investigate niche markets		Investigate new markets	Investigate niche markets
			Outlets that supply only game meat		
			Export to retailers in RSA		
				Increase volume sold to local market	
				Create awareness of game meat	
Export biltong to different markets					

**Product development**

					Game sushi/ Game soup Affordable user-friendly products Biltong (EU/Asia) Game tongue
			Game meat snacks		

Producers	Harvesters	Processors	Retailers/Restaurants/ Butcheries	Government	NGOs
			Goulash Sausages		
		Include chilled meat as export product Game biltong		Value-added game products	
Include meat of large game in export					
<b>Product diversification</b>					
		Game off-al			Game off-al
			Kidneys/Liver		
		Game skins Secondary businesses		Species specific products	
Crocodile meat					
Elephant meat				Elephant/meercat meat?	

### Detailed Value Chain Promotion Approach (Tool 2 - Analysis amongst value chain)

<b>Vision</b>					
		Sustainability	Sustainability	Sustainability	
Structured value chain			Seperation of game from other value chains		
	Increase number of game harvested	Number of game harvested maintained			
		Consistency of quality	Consistent supply of game meat	Balance local and export consumption	
User-friendly regulations					Producers to take responsibility of quotas
			Branding of game meat		
Confidence oin different game species		Awareness campaigns			
				Optimum capacity utilization	Desentralising of processing
Conducive environment for business				Clarify ownership of game meat	
		Reduccion of trade barriers			

Producers	Harvesters	Processors	Retailers/Restaurants/ Butcheries	Government	NGOs
				Regulation of standards	
Minimum recommended prices	Increase prices of game				
<b>Strategies</b>					
	Sustainability of harvesting				
Use of experts in field of wildlife management and game meat utilisation					Support to producers
	Increase off-take	Control the numbers of game harvested per region			
Protection of intellectual property		Develop own microbiological criteria			
			Ease the supply of game meat		
Simplify regulations	Equal standards for local and export harvesting	Maintain tight regulations of MET		Simplify quota system for harvesting	Revise regulations
				Assist with adoption of standards	
Prices for game at least N\$ 12-16.00/kg	Increase prices for game				
Awareness of game in communal conservancies	Processor awareness of market	Campaigns to create consumer awareness	Awareness of demands in consumer market		Awareness through TV/Radio campaigns
Improve knowledge of processing in communal conservancies					Incorporate communal conservancies in value chain
	Increase share of income	Spread financial benefits equally			
	Increase efficiency of processors			Capacity utilisation equivalent to market research	
Conducive environment for business/Synergies in VC		Control markets and prices			
			Branding of game meat		Value-added products/diversification of products

Producers	Harvesters	Processors	Retailers/Restaurants/ Butcheries	Government	NGOs
National strategy for wildlife management/trade and use				Justify ownership of game	National game meat export policy
			Campaigns to persuade locals to consume more meat	New Food Safety Act	
Market research	Improve marketing, branding and market penetration	Maintain image of game meat as high value product	Consumer survey of prices/products	Studies on consumer preference/behaviour	Market intelligence/scientific research/niche and new markets
Common body					

Common body					
Services					
Create awareness of the			Namibian game meat value chain		and promote game meat
Drive VC strategies					
	Forum for discussion,	lobbying		and negotiating	
		Promote best practices	and setting of procedural	standards	and accreditation
		Classification and grading			
	Information sharing		Conduct and/or promote research and information dissemination	on value chain including	production/cooking
	Facilitate market penetration		and market surveys (prices/products)		and market assistance
	Protect members	structure the value chain,	keep contact with actors and		remove obstacles in VC
			Assist with obtaining permits		Develop skills
					Promote value-addition
Members					
		Producers			Producers (core)
		Harvesting teams			
		Processors			
		Retailers/Restaurants			Retailers/Restaurants/Outlets
		Tanneries			
	NAU				
	MET	MET (?)	MET (?)	MET	MET (?)
	DVS	DVS (?)	DVS (?)	DVS	DVS (?)
	MOHSS	MOHSS (?)	MOHSS (?)	MOHSS	MOHSS (?)
				NMA	Financial institutions

Producers	Harvesters	Processors	Retailers/Restaurants/ Butcheries	Government	NGOs
				MTI NSI	NGOs/Researchers
<b>Funding</b>					
Grant from GOVT/MB			Grant from govt + small member fee	Grant from GOVT/MB	MTI/MET
	Membership fees (conditions)		Membership fees		Micro level - own contribution Core budget for secretariat
Levies	NO LEVY	Levies on slaughtered game payable with permit issued	Levies = 0.8% of transaction	Levies	
				NSI OFFERED TO RUN SECRETARIAT	
<b>Procedures</b>					
Membership friendly organisation				Committee with chairperson Secretariat run by GOVT or NSI One representative for every actor group	
	One representative for every actor group				
		Form part of Meat Board			Not part of the Meat Board
	Benefits must be visible				
				Own constitution	
		Regular meetings			
			AGM		
					Separate value chain from beef value chain

**Annex 6: Press release TRAFFIC study**



### Namibia's wildlife-ranching industry significant but still below potential

**Windhoek, Namibia, 20th July 2011**—Ecotourism, together with legal production of game meat and hunting tourism, have the potential to contribute significantly to conservation, food security and to Namibia's economy, according to a new report launched today by TRAFFIC, the wildlife trade monitoring network.

The report, *An analysis of game meat production and wildlife-based land uses on freehold land in Namibia: Links with food security*, shows that game meat is the primary source of rations for around 23,000 agricultural workers who consume over 4,500 tonnes of game meat each year.

The report finds that while wildlife-based land uses (WBLU) on private land already contribute significantly to food security through provision of protein, generation of employment and foreign currency, there is more potential in this sector and a need for greater integration of emerging black farmers.

"This study lies at the nexus of conservation and development, biodiversity and human livelihoods," said David Newton, Regional Director of TRAFFIC's East/Southern Africa programme.

"It demonstrates how game meat production can gain an elevated role in terms of social and economic development within Namibia while enhancing the viability of wildlife-based land-use in the process."

Managing Director of WWF in Namibia, Mr Chris Weaver, commented that the report illustrates how the game meat industry, as regulated by the Namibian government, serves as a global model for conservation and economic development, in sharp contrast to most of the world where un-regulated game meat is a conservation threat to a growing number of species.

In the study, researcher Dr Peter Lindsey found that on privately owned farmlands in Namibia, large quantities—between 16–26 million kilogrammes—of game meat are produced annually, most of which is used domestically, contributing significantly to food security.

If channelled appropriately, game meat produced on farmlands could also reduce illegal wildlife hunting, a serious problem in some areas.

"Making supplies of affordable game meat available to residents of communal land and informal settlements in farming areas may help reduce wildlife poaching in the minority of areas where illegal hunting is a serious problem," said Lindsey.

Approximately two-thirds of game meat produced on privately owned farms comes from Oryx *Oryx gazella*, Greater Kudu *Tragelaphus strepsiceros* and Springbok *Antidorcas marsupialis*.

Lindsey also found that WBLU on privately owned land is associated with higher levels of employment than equivalent livestock farmed areas, a finding in keeping with another recent study from South Africa.

Importantly, the legal harvest of wildlife for meat and/or trophies can create key incentives for wildlife conservation too—as highlighted by threatened wildlife species like Hartmann's Mountain Zebra *Equus zebra hartmannae*, which has increased in recent years in Namibian farmland areas.

The report makes a number of recommendations, including incentives for the formation of fully integrated commercial wildlife conservancies; support for the reintroduction of the full range of indigenous mammal fauna where possible on private land; the exploration of ways to permit the reintroduction of buffaloes to

some areas; and integrating the development of WBLU with the land reform process by encouraging emerging farmers to engage in wildlife-ranching.

“Wildlife-based land uses are potentially less risky than livestock production because income is not so dependent on rainfall as that from livestock production, and because wild animals are better adapted to Namibia’s harsh environment,” says Lindsey.

Risk is minimized in areas where multiple forms of wildlife-based land use are practiced, and where income from wildlife-ranching is not reliant on high off-takes of wildlife (i.e. high-end, low off-take trophy hunting and/or ecotourism).

The study was undertaken as part of a German government (BMZ)-funded programme implemented by TRAFFIC entitled “Vulnerable People, Diminishing Wildlife: Addressing priority bushmeat trade, livelihood and food security issues in Africa”.

Currently the area of privately owned land in Namibia used for wildlife production is around 288,000 km<sup>2</sup>, with approximately 32,000 km<sup>2</sup> devoted exclusively to wildlife production.

###

**For further information:**

**Richard Thomas**, Communication Co-ordinator, TRAFFIC International, richard.thomas@traffic.org, +44 1223 279068, mob: +44 752 6646 216.

**About TRAFFIC**

TRAFFIC, the wildlife trade monitoring network, works to ensure that trade in wild plants and animals is not a threat to the conservation of nature. TRAFFIC is a joint programme of IUCN, the International Union for the Conservation of Nature and WWF.

[www.traffic.org](http://www.traffic.org)

**Annex 7: Press articles**



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## Game meat could be money spinner - by Irene !Hoaës

21 July 2011

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Empfehle dies deinen Freunden.

WINDHOEK – Namibia's potential in wildlife-based land use (WBLU) has not yet been fully harnessed despite its huge potential as a money-spinner.

This information is contained in a recent TRAFFIC East and Southern Africa Report, "An Analysis of Game Meat Production and Wildlife-Based Land Uses on Freehold Land in Namibia: Links with Food Security."

According to the study, earnings from game meat in Namibia are N\$177 million per year, 40 times more than previously recognised.

Researcher, Peter Lindsey said the earnings could be much higher if a greater proportion of game meat is exported.

It is estimated that the full exploitation of export potential could generate an additional \$440 million per annum.

Approximately 15 to 22 million kilogrammes of game meat are produced annually on freehold land only.

Unlike meat from domestic animals (87 percent exported), most game meat, about 99 percent, is locally consumed.

"Owing to the expansion of trophy hunting and ecotourism, the economic output of wildlife on freehold land is approaching that of livestock, despite veterinary policies favouring livestock production," Lindsey said.

Moreover, prices for game meat obtained by farmers have gone up by 45 percent in the last two to three years.

However, the prices obtained by game meat farmers are lower than those of livestock farmers.

Ironically, the price of game meat in stores is higher than that of domestic animals, it is revealed.

Wildlife populations in Namibia are said to be much higher than previously thought.

Previous estimates of animals such as the warthog was approximately 180 000, while current estimates put the figure at more than 700 000.

Current estimates of both the oryx and kudu are close to 700 000, while previous estimates were at slightly less than 400 000.

Among the most important game meat sources are oryx, kudu, springbok, hartebeest and zebra.

Lindsey further stated that WBLU is likely to be less affected by climate change than livestock farming.

The farming method is expected to increase in prevalence in future and may exceed the economic contribution of livestock farming in the near or medium future.

The study revealed that WBLU positively correlates with employment, as it associates with more and higher quality employment than livestock farming in semi-arid areas (southern Namibia).

This trend, according to the study, is the same in Zimbabwe and South Africa.

WBLU has reportedly replaced livestock farming in some semi-arid areas of South Africa and (formerly) Zimbabwe.

In Namibia, however, wildlife farmers have retained livestock on their farms.

Lindsey said another factor in favour of WBLU in Namibia, is the fact that wildlife is becoming scarce elsewhere.

The sector's full potential is however hampered by certain legislation, e.g. veterinary restrictions preventing the reintroduction of buffaloes, which is viewed as the



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single most important specie for generating returns from WBLU.

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# Namibia bush meat trade could save its wildlife: study

Thu Jul 21, 2011 6:13am GMT

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ABIDJAN (Reuters) - It isn't often that conservation groups urge hunting game as a way to save wildlife, but according to one such group, Namibia could conserve its nature better by doing exactly that.

A report by TRAFFIC, the wildlife trade monitoring network, proposed on Wednesday expanding the practice on farmlands in the vast, sparsely populated southern African country, saying it could help both fill stomachs and conserve nature.

Trade in bush meat all over Africa has been seen as a major threat to wildlife, but in Namibia, the report says, a vibrant bush meat trade could be sustainable.

"On privately owned farmlands in Namibia, large quantities-between 16-26 million kilogrammes-of game meat are produced annually, most of which is used domestically," the report said, giving recommendations like reintroducing buffaloes on farms.

"Making supplies of affordable game meat available to residents of communal land ... in farming areas may help reduce wildlife poaching," researcher Peter Lindsey said.

Namibia abounds with antelope species like springboks that can make tasty meals -- not just for lions but for humans too.

In the jungles of west and central Africa, poaching has decimated populations of chimpanzees, gorillas and forest elephants. The savannah of east and southern Africa has also been affected.

A U.N. study last year found Africa's game parks have lost well over half of their big mammals, such as the lions and buffaloes, that draw millions of tourists each year, to rampant hunting and farming since 1970.

African leaders are increasingly aware of the economic value of the animals in their parks that are favourite tourist attractions, but providing economic incentives to mostly poor people to better conserve nature can prove a challenge.

"Wildlife-based land uses are potentially less risky than livestock production because ... not so dependent on rainfall ... and because wild animals are better adapted to Namibia's harsh environment," Lindsey said.

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The relations between First Quantum and the Democratic Republic of Congo have gone from bad to worse in recent months, after the country expropriated the miner's \$765 million Kolwezi copper tailings project in September. [Blog](#)



### Africa optimism rising

When some of the most influential figures in emerging markets finance spoke to a group of Reuters editors, they were asked about top picks for growth beyond the so-called BRIC countries of Brazil, Russia, India and China. [Blog](#)



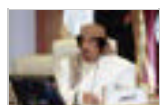
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The giggles started when the seventh journalist in a row said that his question was for Egypt's water and irrigation minister, Mohamed Nasreddin Allam. [Blog](#)



### Libya: a mixed bag

It has debt levels to die for and huge amounts of oil, but economically it's lagging and political concerns remain. Speakers at a Libyan trade and investment forum this week saw the North African country as a mixed bag. [Blog](#)



### If Guinea Can...

If Guinea can pull off free and fair elections this weekend, it will lay the foundations for what could be one of Africa's most unexpected and significant good news stories. [Blog](#)



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Africa is providing a lot of fine material for the London theatre these days. [Blog](#)



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Thu, 28 Jul, 2011

[Namibia sticks to AU lead on](#)

[Libya](#)

By Jan Poolman Thu, 28 Jul, 2011

**Namibian Weather**

Clear sky

Temperature: 12 °C

Wind: East-Northeast,

1.5 meter/s

Empfehlen 2 Tsd.

## NAM STILL HAS SIGNIFICANT TROPHY-HUNTING POTENTIAL

Posted on Fri, 22 Jul, 2011

**Author:** Ellanie Smit

GROWING the export market of game meat can generate millions for the country, but at the same time Namibia has to place a greater focus on developing trophy hunting and eco-tourism.

The development and expansion of Wildlife Based Land Uses (WBLU) to its full potential on freehold land is significantly hampered by three aspects of legislation; the veterinary restrictions preventing the re-introduction of buffaloes, the failure to devolve user rights over wildlife to land owners more fully and preferential allocation of permits to use wildlife on farms with perimeter game fencing. This is according to the just launched report by Dr Peter Lindsey entitled "An analysis of Game Meat production and Wildlife-based Land Uses on Freehold Land in Namibia: links with food security."

Lindsey says that unlike meat from domestic stock of which 87% is exported, most game meat, an estimated 99%, is consumed in Namibia. The Under-Secretary of the Ministry of Environment, Simeon Negumbo, said that increasing game numbers can bring still more benefits to communal conservancies. "The overall use of game resources still amounts to only about 16% of the potential off-takes and we know that the markets have much more absorption potential. Everybody will profit from capacity building measures which also help to increase the market as a whole."

Approximately 15 to 22 million kg of game meat is produced annually on freehold land. "Game meat is far more important in economic terms than was previously recognised with about N\$177 million per year being generated. This is 40 times more than was previously recognised," said Lindsey. He said however that earnings could be much higher if a greater proportion of game meat was exported with the full exploitation of export that could generate an additional \$440 million per year. According to the study, approximately 5,5 million kg exportable game meat is produced per year of which the potential earnings is N\$440 million per year.

Currently only 4% of exportable meat is exported of which most goes to South Africa. Lindsey says that livestock is still the most commonly practiced land use in Namibia with 92% of farmers practicing this form of farming. Livestock production on freehold land contributed N\$1,97 billion to the Gross National Income while wildlife and tourism generate at least N\$1,4 billion.

However 80% of farmers derive some income from WBLU. Lindsey says that although wildlife populations may be higher than previously thought, large and valuable wildlife is still rare on farmlands, which reduces potential returns. Due to the lack of big game, and especially buffalo, on freehold land, Namibia has the lowest returns per safari hunting client in the SADC region. Although the occurrence of species such as kudu and oryx range between 80 to 90%, large wildlife, including elephant, rhino and hippo remain low within the country.

According to the report, trophy hunts involving big game are 4 to 12 times more valuable than those of plain game. Trophy hunts for plain game total up to N\$35 000 while for lions it can be as much as N\$434 000, elephant N\$238 000 and leopard and buffalo respectively N\$140 000.

For the full potential of WBLU to be realised, Lindsey said that legislation is required to recognise and promote fully functional conservancies, integrating emerging farmers is very important and a more flexible veterinary control environment is needed. Measures have to be implemented to permit the reintroduction of the full range of wildlife species.

"The current veterinary control strategies greatly reduce potential earnings from WBLU on freehold land and in communal conservancies by precluding the reintroduction of buffalo."

Buffalo are the single most important species for safari hunting and there is huge scope for buffalo reintroduction in Namibia. According to him possible alternative veterinary control strategies could be through permitting the reintroduction of Foot and Mouth Disease-free buffalo, shifting of veterinary boundaries, compartmentalisation to allow creation of wildlife and livestock zones and commodity-based trade.

However, at the moment all focus appears to be on entrenchment and expansion of current strategies. Lindsey said that at the moment there is no real recognition of commercial conservancies and permitting policies favour fenced isolated ranches rather than large open systems. "There needs to be understanding amongst policy makers of the advantages of fully formed conservancies, clear legal recognition of conservancies as well as disincentives for the fencing of individual ranches."



A total of 250 farmers collectively managing 412 farms were surveyed during 2009 for the report.



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Dr Peter Lindsey and Dr Romeo Bertolini, Counsellor for Development Cooperation Embassy of Germany, pictured at the launch of the report  
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