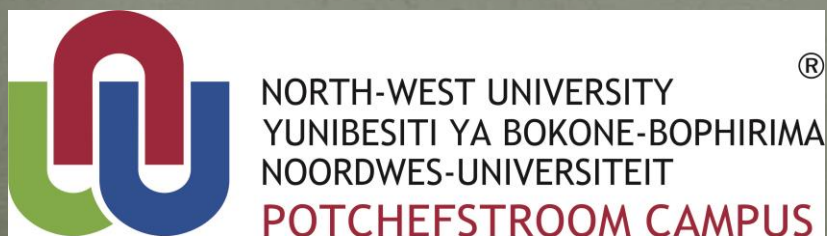


Game meat as alternative food source for Africa: A retailer perspective

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INTRODUCTION

- Food (in)security is critical in several countries
- Every South African citizen has a right to sufficient food and water, and social security
- Food security refers to the ability of individuals to obtain sufficient food on a day-to-day basis.
- Accessibility to (demand) & provision (supply) of nutritional food for South African households.

GAME RANCHING INDUSTRY

- The total economic contribution during 2014 was \pm R20 bn (Cloete)
- **28 000 000 ha** utilised for private game ranches.
- The total economic turnover of the industry has grown at more than **20% per annum** over the last 15 years.
- This industry uses less than **20%** of the veld resources in the country
- Estimated that the game ranching industry provides more that **20% of red meat** consumed in SA during the six hunting months of the year
- Role of this industry in food security is becoming more and more important

GAME MEAT AS ALTERNATIVE??

- Game meat offers various benefits to consumers:
 - high levels of protein; rich in iron; rich in B-vitamins.
- Variety of species to fulfil different needs and tastes.
- Health problems in SA

POTENTIAL????



- Why the relative low consumption levels in South Africa??



Challenges.....

- Perceptions of fresh game meat: how to?
- Quality of the meat
- Fluctuations in the export market
- Legislation
- Local versus international market
- Supply versus demand
- Readily availability of game meat



PURPOSE OF THE RESEARCH

- To determine the magnitude of game meat production (supply) and consumption (demand) in South Africa



Supply and demand study across South Africa

Current results:

4 Qualitative interviews with retailers of game meat

METHOD: SUPPLY SIDE

| | | | | |
|---|---|----------|---------------------------------------|---|
| Activity 1 | Retailers, producers and processors | | | |
| Respondents | Action | Timeline | Method of research | Outcomes |
| - | Compile a detailed database of retailers, producers and processors | 3 Months | Desktop study | Complete database for future research and communication |
| Activity 2 | Determine the status of game meat production in SA | | | |
| Retailers (Checkers, Spar etc.) | Gather information regarding: supply of game meat, legislation, number of carcasses, obstacles in growth of industry, rand value etc. | 6 Months | Qualitative research – interviews: 15 | Opinions of game meat production from the supply side: Research report and research articles Development of questionnaire |
| Producers and processors (Camdeboo, Mossrich etc.) | | 6 Months | Qualitative research - Interviews: 45 | |

METHOD: DEMAND SIDE

| | | | | |
|---|--|-----------------|--|--|
| Activity 1 | Determine the consumptive patterns of consumers | | | |
| Respondents | Action | Timeline | Method of research | Outcomes |
| Sample of consumers of game meat in GA, KZN and WC: at selected producers & retailers | Gather information regarding: current use of game meat, price sensitivity, opinions on the value of the product etc. | 12 Months | Quantitative research: GA: 650 KZN: 650 WC: 650 | Research Report on consumer preferences, use and knowledge of game meat products |
| Activity 2 | Determine the non-consumptive patterns of consumers | | | |
| Sample of non-consumers of game meat in GA, KZN and WC: at selected producers & retailers | Gather information regarding: non-use of game meat and related reasons | 12 Months | Quantitative research: GA: 650 KZN: 650 WC: 650 | Research Report on non-use of game meat |

RESULTS

- Current status of game meat as food source in South Africa
 - Awareness amongst consumers (Uneducated)
 - Perceptions of consumers
 - Market is still relatively small for fresh meat
 - Various hunters who are processing own meat
 - 80% processed meat and 20% fresh meat
 - Regulation of the industry is good
 - Quality is more secured



RESULTS

- Challenges of selling game meat as a retailer:
 - Perceptions of the game farmer on pricing
 - Shelf life is a challenge
 - Labelling of meat is constantly changing
 - Unreliable supply thereof
 - Fresh game meat is not popular
 - Commitment and attitude from butchers and retailers



RESULTS

- Challenges regarding the consumer:
 - Do not know how to prepare the meat
 - Want value-added products – easy living
 - Public opinions
 - Currently demand is little
 - Unsure of what is available
 - Pricing



RESULTS

- Monetary value, shelf space, advertising etc.
 - 0.5% of meat stock is venison
 - Cost of advertising in season is high when considering the return
 - Stock on hand is a problem & Out of season
 - Prefer: Kudu & Eland



CONCLUSIONS

- Future of game meat
 - What should it be named: Free Range Game Meat
 - Willing to grow this product and market
 - More in-depth research on consumers:
 - Those that consume game meat
 - Those that do not consume game meat
 - Pricing
 - Training and awareness



THANK YOU

- WRSA
- NWU