

Dr M vd Merwe

9<sup>th</sup> International

# *Wildlife Ranching Symposium*



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12-16 September 2016 • Hotel Safari and the Safari Court • Windhoek, Namibia

***Back to basics:  
“HUNT FOR FOOD”  
Wildlife Industry to regulate  
game meat***



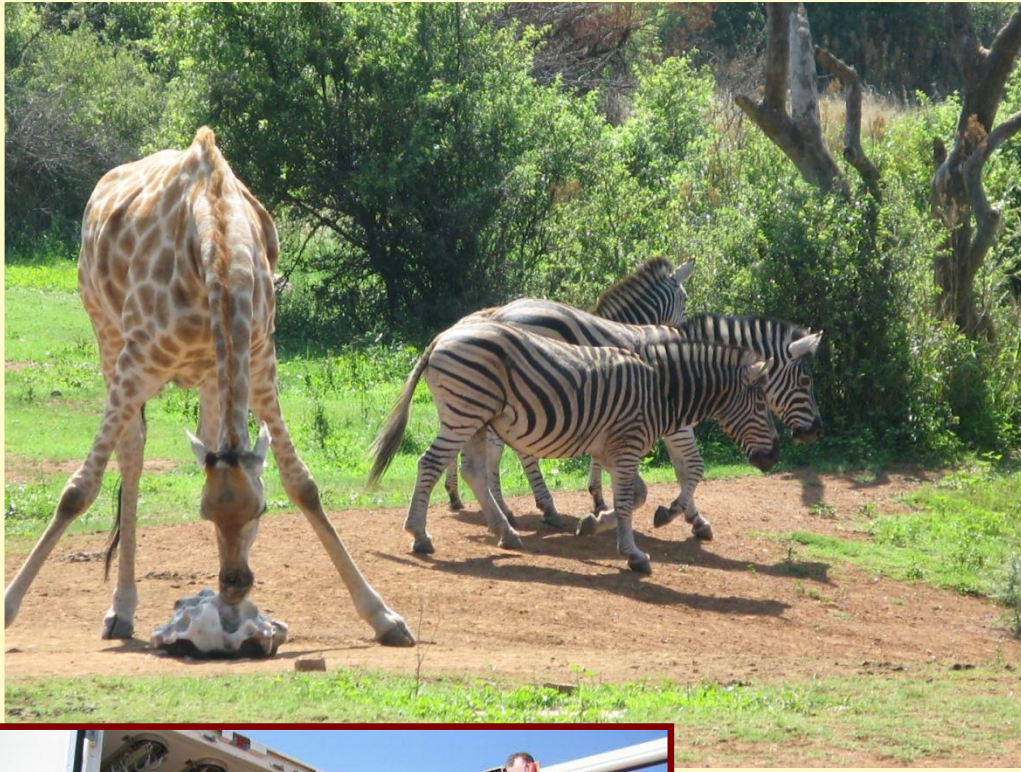
**God stopped making land not humanity**



**A key to promote game meat is ANIMAL WELFARE**

The inhumane reality of domestic meat production.....  
**Irish calves died under horrific conditions while transported from Ireland to France breaching EU laws and not reflecting first world standards**  
**Global Meat News - May 2016**

# The alternative.... The Game Industry “Humane” Reality





# The South African Land Use Model

## Current Contributions

- ✓ R20 billion GDP contribution
- ✓ Decent jobs: 100 000 at better than average wages
- ✓ 100 000 skins

**So how safe  
are trophy  
meat**

**50 000 tons of trophy meat per**

**WHO  
OWNS  
THE GAME  
MEAT**

diversity and conservation:  
natural land converted to sustainable  
economy  
the land use model  
resources for Africa's people



## **FACTS...**

# **Focus on meat production and not the hunt !**

- **Hunting growth not increase in a**
- **Number of animals hunted locally declined by 33% from 2005 to 2015**
- **Trophy hunting with a 31% decline in the number of animals hunted from 2007 to 2013**
- **Foreign hunters visiting South Africa, from just over 16 000 foreign hunters in 2007 (before the economic crisis) to around 8 950 foreign hunters in 2014**
- **Global Industry Survey – Global Meat News: 77% of respondents indicated that industry must emphasis and increase regulation on animal welfare**



## *Perspectives in the Game industry*

Based on the available data, it is estimated that the consumptive utilisation of game animals in South Africa is unlikely to exceed 70% of the annual offspring, which suggests a healthy population growth rate. Game numbers are constantly on the increase and so is the number of hectares dedicated to game ranching.

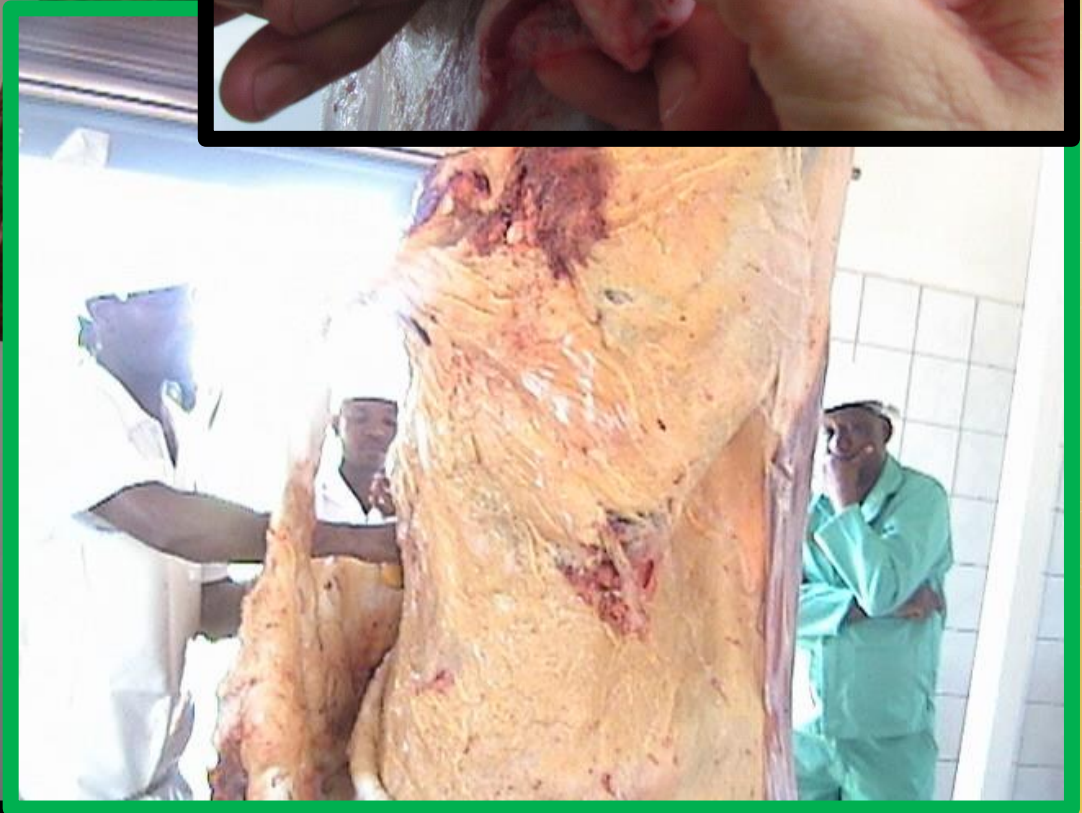
However, this emphasises the need for future development in terms not only ensuring the growth of well-established consumptive markets (biltong and trophy hunting), but also the establishing of new consumptive market opportunities to ensure game ranching remains an economically viable land use option



# EXPORT SCOPE

- Germany is the largest consumer of venison importing about 20,000 MT per year at a wholesale price of \$12.20 to \$14.65
- Korea imported 4,941 MT of venison from New Zealand and Australia last year.
- One meat importer in Singapore is bringing whole frozen carcasses of venison per month (or 240 tonnes per year) at a price of \$5-8/kg
- Japan imports about 144 MT of venison chilled or frozen boneless. The wholesale price is 2,400 yen/kg.
- In addition to the markets identified above, the Halaal market is the largest undeveloped market

# Game Meat vs. Domesticated Meat



# Domesticated animals



# Game animals



<b>Legal guideline from before 1992</b>	<b>No legal guideline up to date</b>
<b>Product development and research</b>	<b>No product development and only limited research</b>
<b>Extensive marketing</b>	<b>No marketing</b>
<b>State subsidized i.e. food security</b>	<b>Not acknowledged as food-producing enterprise</b>
<b>High carbon footprint and low tolerance for global warming</b>	<b>Low carbon footprint (fewer human interventions-antibiotics, supplements), good tolerance for global warming</b>
<b>Inhumane transportation and slaughtering procedures</b>	<b>Animal humanely hunted in natural environment</b>
<b>Mainly feedlot supply to abattoirs</b>	<b>Free roaming animals</b>
<b>High production costs</b>	<b>Low production costs</b>
<b>69% of SA for grazing (red-meat production)</b>	<b>79% of SA for game farming (game-meat production)</b>
<b>Manipulated product- poor health, low income, high crime, harmful to environment</b>	<b>Natural product- increase health, high income low crime, enhance environment</b>
<b>Local red meat demand exceeds production – currently, SA imports &gt;48% to meet demand</b>	<b>Game meat production could supplement the red-meat market</b>



**GROW CONSUMER TRUST  
WITH A LEGALISED SUPPLY  
CHANNEL**

**Importance of auditors to  
verify your compliance**

**SELF REGULATION THE  
ANSWER!**

# Industry planning for the future:



## 1. GDP Contribution

R75 to R100 billion per annum

## 2. Decent jobs

250 000 decent jobs, Steady improvement in living standards

## 3. Food security

Produce from 150 000 to 250 000 tons of game meat per annum

Facilitate the export of game meat with a target of R1 billion exports (FMD permitting)

## 4. Agrarian development, biodiversity and conservation

From 20 to 30m ha for game ranching/From 20 to 30m head of game

More species on all game ranches

## 5. Transformation initiative

Wildlife Lab proposal

Formalize and Legalize SA game meat

Network of meat processing facilities

Create opportunities in the supply chain for deracialised empowerment

Education and upliftment through skills development and training

Manage and build the game meat industry to its full potential

# Wildlife Lab Initiative 2016

## Baseline

- ✓ Currently 20 million ha marginal agricultural land used for semi-extensive game ranching (20 million head of game - 6 more than cattle)
- ✓ R 2.300 billion embedded capital in land and animals
- ✓ 20% of red meat in SA is game meat produced without any game meat safety regulations
- ✓ 180 slaughter facilities unrecorded on >10 000 game ranches

## Risks

- ✓ Draft Game Regulations not published as yet
- ✓ Significant private sector investment must be found to fund the initiative
- ✓ The game meat initiative will not develop any infrastructure owned or managed by government

## Budget/Partnership for a R 490 million Investment

- ✓ Private Sector will contribute 72% of investment
- ✓ DTI/Treasury to cover 22%
- ✓ DAFF for GAMPO 6% = R6.5 million



# Salient features of the Game Meat

**Initiative** - detailed 3ft. implementation plan developed for 2021

## Summary statistics of additional Game Meat Production:

✓ Additional game meat (tons)	18.500
✓ Revenue (R'million)	2.141
✓ GDP (R'million)	599
✓ Salaries and Wages (R'million)	300
✓ Direct and indirect jobs (#)	
on farm and processing	2.500
✓ Direct jobs (#) In processing	1.750

★ By 2021, each of 110 processing facilities will create 1-20 direct jobs and generate R 14. m in revenue

# Wildlife Lab 100 feet



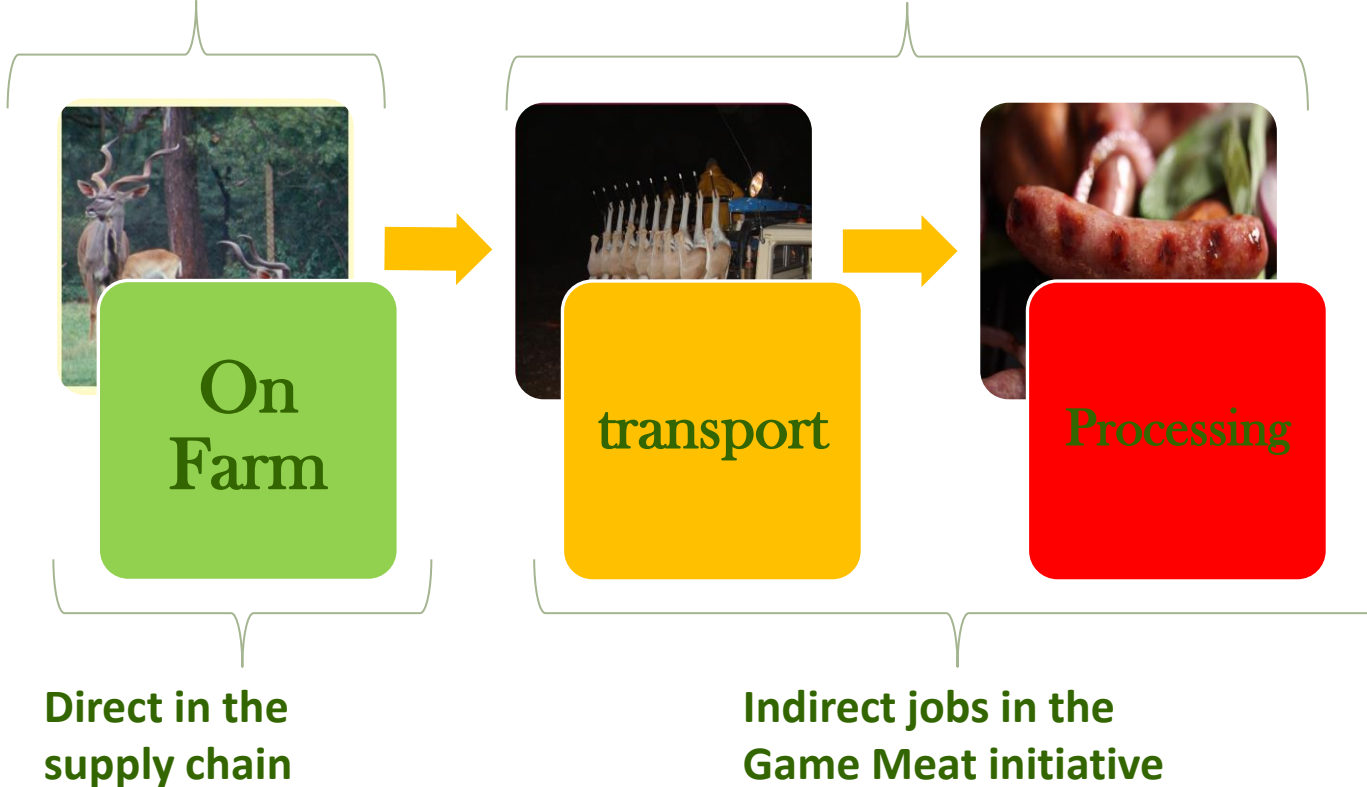
- Game Meat Regulations to be gazetted
  - *Minister to publish for public comments publication*
- Conclude the SA Game Meat Project Office (GAMPO)
  - *MOU- DAFF and WRSA, business plan and budget with appointed project management*
- Notice of Interest (NOI)
  - *Producers, processors, retailers SMME`s, % income for quality research fund, Academic Institutions*
- Macro business case developed
  - *National infrastructure, cold chain transport, curios outlets, tourists markets, export*
- Training Requirements
  - *Basic meat hygiene, 1&2 meat inspection, “blokman”, curio training, furniture/clothes product*
- Support entities identified
  - *Canning plants, business planning, taxidermy, curio initiatives*
- Local Market awareness
  - *Poster developed, school initiatives, quick health snacks, slimming, body building, health*
- National Agricultural marketing Council
  - *Funds, new markets, international campaigns i.e. emergency food UN*
- Facilitate the new processing facilities
  - *Assistance -architects, builders and consultants. Skills program. Competent SMME`s identified*
- 2030 projection of processing facilities for 1 June 2021
  - *Potential areas for growth and development. Expertise from current producers/experts ,MOU`s*



## View from the Processing Perspective:

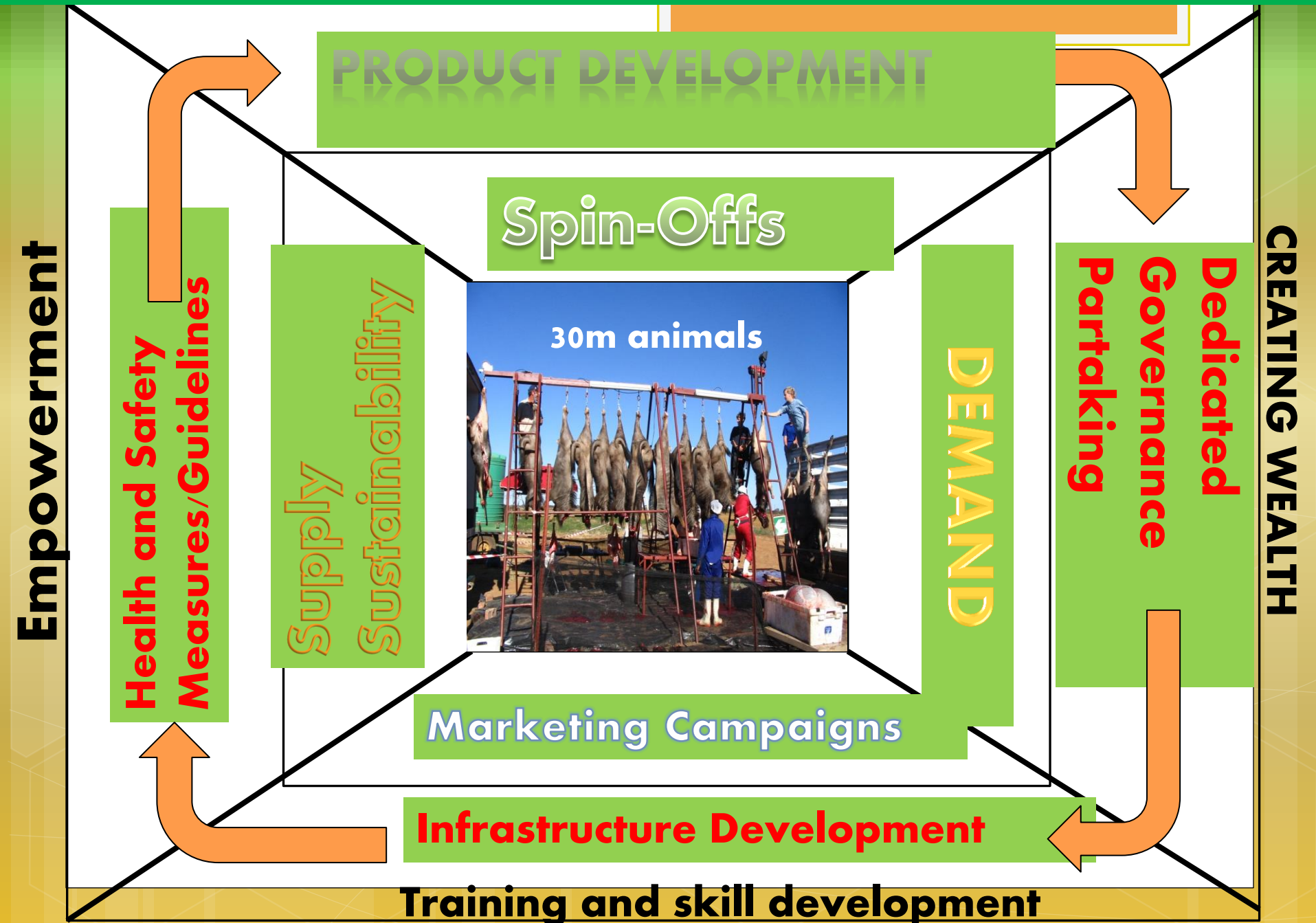
Indirect in the  
supply chain

Direct jobs in the  
Game Meat initiative



## View from the Farm Perspective:

# Game Meat The Key to Successful Transformation





# Slaughter facility on farm - EU Standards

**Light**

**Hanging**

**Meat  
Inspection**

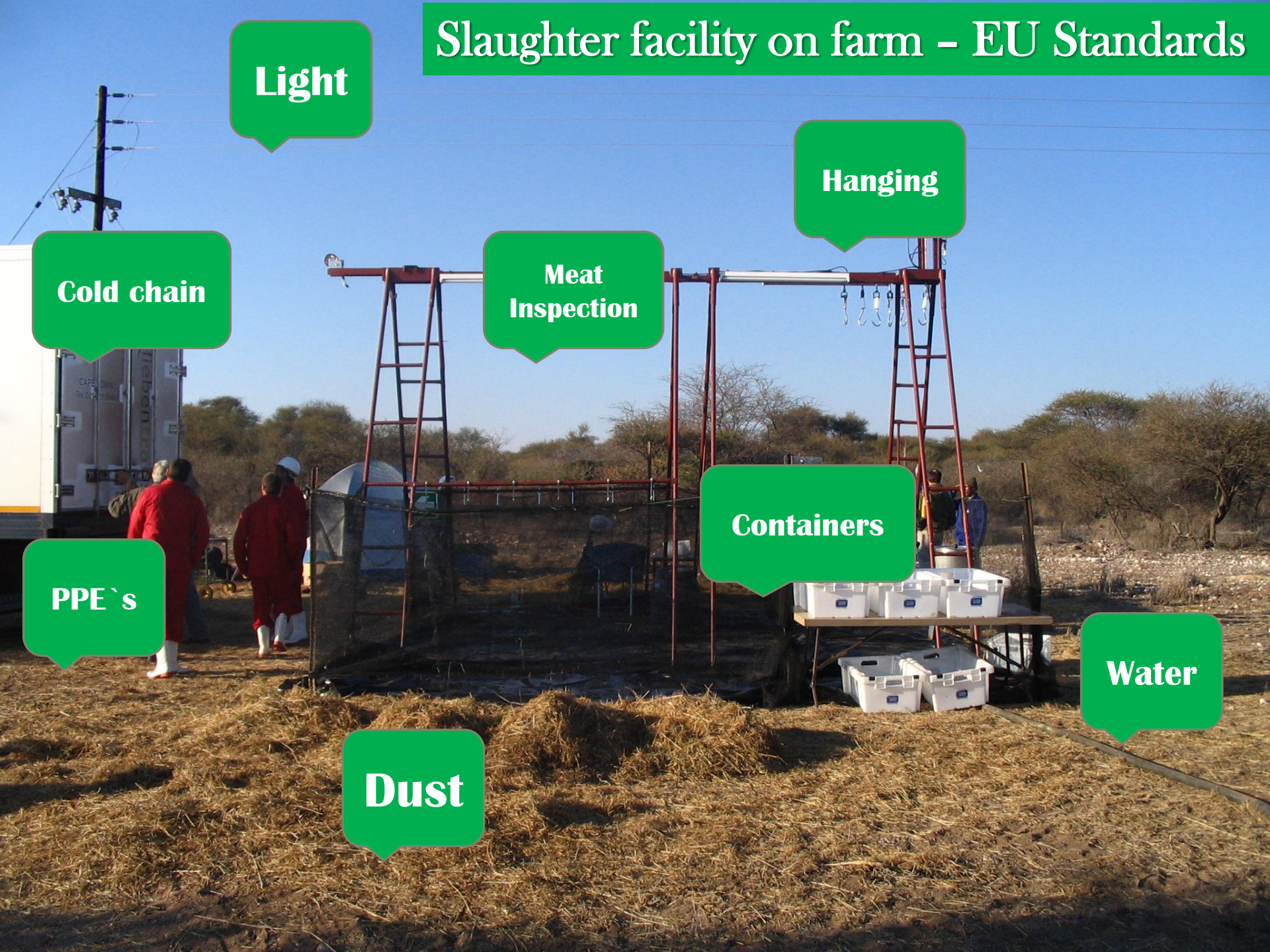
**Cold chain**

**Containers**

**PPE's**

**Water**

**Dust**



# Chilling and transport of PDGC from farm to processing plant



A photograph showing two individuals in white protective suits and hard hats, likely veterinarians or wildlife researchers, attending to a large dead elephant lying on the ground in a savanna environment. The elephant's head is in the foreground, and its body extends towards the background. The people are positioned behind the elephant's head, possibly performing a procedure or examination. The background consists of dry grass and some trees.

# **Previous success stories**

**1976**

**Wildlife utilization and game  
ranching-**

**Report on a study of recent  
progress in this field in South  
Africa**

**Sue Lee and Archie Mossman  
Published by: IUCN  
Switzerland**



6

**Consumer  
Traceability  
Labeling**



5



**Processing**



4



**Slaughter facility**



3



**Transportation**

2



**Harvesting**



**Game Ranches**

1



**Deracialised  
market share**



<b>Bush animals hunted for meat</b>	<b>Game animals hunted for meat</b>
<i>Customary biodiversity used for protein food</i>	<i>Customary biodiversity used for protein food</i>
<i>Economic gain as main objective</i>	<i>Economic gain as main objective</i>
<i>Mostly illegal</i>	<i>Mostly Illegal</i>
<i>Preferred taste and meal, for deli-varieties</i>	<i>Preferred taste and meal, for deli-varieties</i>
<b>Animals most productive and resilient when managed</b>	<b>Animals most productive and resilient when managed</b>
<b>African animals adopted to African ecosystems</b>	<b>African animals adopted to African ecosystems</b>
<i>Resource with no ownership of animals or land</i>	<i>Resource owned by private ranchers on privately owned land</i>
<i>Depleted and shrinking populations</i>	<i>High growth and increased populations</i>



## **Solutions to the Challenge = Ownership**

### *Meat production - Bush and Game animals:*

- 1. Ownership will ensure sustained numbers*
- 2. Develop private wildlife production systems*
- 3. Implement harvesting systems*
- 4. Full utilization (with innovation) of everything that comes from the wild/bush*
- 5. Allow/create true potential in terms of commercial value*



# Special gratitude:

- Pictures from Meldt van der Spuy 2013-2016
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# The world's breadbasket?

# The end



South  
Africa