

Master Plan for increased Export of Cattle and Beef from the NCAs – Final Report



Meat Board of Namibia



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Purpose of Study

- The objective of the Consultancy is to draft a Master plan that will assist the industry to increase the cattle and beef marketing sector in the NCA in order to increase cattle and beef exports from the NCA for the benefit of the national meat industry in general and to the benefit of the cattle producers in the NCA in particular.





Objectives

- To present a survey of available cattle and beef production infrastructure, e.g. abattoirs (capacity), auction facilities loading ramps, feedlots, etc.
- To present clear and unambiguous practical strategies and activities that can contribute to the increase of cattle and beef exports from the NCA
- To indicate the provision of services by existing and future potential service providers on livestock marketing aimed at increasing cattle and beef exports from the NCA
- To outline clearly the cattle and beef marketing potential and market strategies for both local regional and international markets
- To indicate value-addition initiatives in the cattle and beef market value chain that will lead to increased producer income
- Identify and recommend policy guidelines to assist government and regulatory institutions aimed at successful implementation of cattle and beef products trading locally, regionally and internationally





Major Findings (Current situation)



- Total off take of cattle was estimated to be 8.17% in 2000 and today it is estimated to be around 9.5%.
- Government extension services have limited capacity to support livestock farmers to become commercially oriented cattle producers.
- Although considerable progress was made in improving livestock marketing infrastructure, considerable gaps still exist.
- The demand for production inputs like genetic material, feeds, licks and veterinary medicines increases while supply remains limited.
- Rangeland condition and productivity is generally very poor.
- Farmers are poorly organised at local level in the northern communal areas and are not much involved in supporting their members in improved production and marketing
- Many households own only a few cattle.
- Around 38% of cattle herds consist of cows and the average calve to cow ratio for all regions is estimated to be around 44%. An average bull ratio in the whole herd is estimated at 4% for all regions, but bull ratio in the cow herd is much higher at an estimated 11%.



Major Findings (Current situation)

- Meatco currently slaughters approximately 18,000 cattle per annum at their two abattoirs, with a potential full capacity of 40,000 if chilling/freezing capacity at the two abattoirs is enhanced. Chilling/freezing capacity is currently seen as the major constraint to allow Meatco to absorb more cattle, especially during the peak marketing months.
- More than 70% of cattle slaughtered at Meatco are C grades; 60% are 0 and 1 fatness grades and nearly 70% are oxen. In general it can be concluded that the vast majority of cattle slaughtered at Meatco are old and lean oxen.
- Smaller buyers import around 80% of their cattle from the south of the veterinary cordon fence. It is estimated that 18,800 cattle entered the NCAs from the south and most of them are slaughtered for the local market. Additionally, the equivalent of 10,000 cattle enters the NCAs in form of cuts and processed meat. Roughly a similar amount again leave the NCAs as deboned cuts from Meatco for the Namibian and South African markets
- “Trekking” of cattle to the quarantine facilities (Caprivi) with subsequent loss in condition and weight is considered one of the biggest obstacles to farmers. Huge financial losses are incurred by farmers if cattle change from C1 to C0 with a conformation score of 2. This is very often what happens from the farm to the abattoir

Inputs

Production

Outputs

Consumers

- Competence (KSA)
- Medicines and vaccines
- Supplementation
- Better genetics
- Rangeland Management
- Other inputs

Farmer
Land
Other resources

- Agents
- Speculators
- Abattoirs

Marketing

- Other buyers
- Transporters
- GRN

The Future of off take in the NCAs

“Unless farmers perceive cattle as a commercial asset that generates money, there will be very little incentives for the implementation of improved and sometimes costly technologies”.

Methodology/Outputs

Consulted 46 individuals from 12 different institutions

No Silver Bullet – multi-stakeholder integrated approach needed

6 Objectives

21 Strategies

82 Major Actions



Objective 1: Inputs (soft- and hardware) are demand driven and of high quality

Strategy	Major Action	Resp
1.1. Provide effective livestock oriented agricultural extension services	1.1.1. Appoint sufficient agricultural extension staff with livestock & rangeland qualification	DEES
	1.1.2. Train existing agricultural extension staff in livestock & rangeland production	DEES
	1.1.3. Provide adequate budget to enable extension staff to reach farmers (e.g. S&T)	DEES
	1.1.4. Link existing mentors in Agribank and LPF initiatives actively to extension staff at regional and local level	DEES, LPF & Agribank
	1.1.5. Mainstream current donor-supported mentorship programmes within GRN structures	DEES, LPF & Agribank
	1.1.6. Parallel to 1.1.5., extend mentor contracts to minimum 3 years additionally, to build on current successes so far achieved	Agribank & LPF
	1.1.7. Investigate the outsourcing of livestock oriented extension services to the private sector	MAWF

Objective 1: Inputs (soft- and hardware) are demand driven and of high quality

Strategy	Major Action	Resp
<p>1.2. Improve access of farmers to feeds, licks and veterinary medicines and services</p>	<p>1.2.1. Promote supply of feeds, licks and other inputs (especially phosphate licks) through incentives to small scale entrepreneurs</p>	<p>MAWF, MB & Mentors</p>
	<p>1.2.2. Investigate and develop a phosphate-lick supplementation subsidy scheme</p>	<p>Meat Board</p>
	<p>1.2.3. Further decentralize availability of veterinary medicines and drugs to selected small-scale retailers</p>	<p>DVS</p>
	<p>1.2.4. Revive para-vet system</p>	<p>DVS</p>
	<p>1.2.5. Provide veterinary medicines and vaccines in small packages that are more affordable to small-scale farmers</p>	<p>DVS & private sector</p>
	<p>1.2.6. Promote the creation and maintenance of an efficient cold chain for veterinary drugs and medicines amongst farmers</p>	<p>DVS & private sector</p>



Objective 1: Inputs (soft- and hardware) are demand driven and of high quality

Strategy	Major Action	Resp
1.3. Improve access of farmers to superior breeding material	1.3.1. Implement an exchange programme for superior genetic material amongst farmers and villages north of the VCF	DART
	1.3.2. Provide superior genetic material from GRN facilities south and north of the VCF	DART
	1.3.3. Promote availability of superior genetic material from private breeders south of the VCF	NSBA
	1.3.4. Develop and implement a policy that will prevent the selling of inferior quality breeding material from SVCF	MAWF & NSBA
	1.3.5. Promote the castration of inferior breeding stock in herds	DEES, DART & Mentors
	1.3.6. Sensitize and train farmers in the advantages of using adapted and superior breeding material.	DEES, DART & Mentors



Objective 1: Inputs (soft- and hardware) are demand driven and of high quality

Strategy	Major Action	Resp
<p>1.4. Support farmers' associations to become more functional and involved in marketing activities</p>	<p>1.4.1. Strengthen regional farmers' unions through appropriate training and backstopping</p>	<p>NNFU</p>
	<p>1.4.2. Fund operational activities of regional farmers' unions to enable them to attend meetings and other related activities</p>	<p>NNFU</p>
	<p>1.4.3. Support the establishment and operation of "grass roots" farmers associations in each region.</p>	<p>NNFU</p>
	<p>1.4.4. Develop and maintain a detailed database of cattle owners and link them to relevant stakeholders (e.g. Meatco, Auctioneers, etc.)</p>	<p>Meat Board</p>
	<p>1.4.5. Regularly inform cattle owners on cattle prices</p>	<p>Meat Board</p>



Objective 2: The effectiveness and efficiency of cattle production is increased

Strategy	Major Action	Resp
2.1. Improve rangeland condition and productivity	2.1.1. Roll out successes of the CBRLM rangeland initiative in all NCA regions (including Caprivi) 2.1.2. Promote the maximum off-take of cattle in the growing season 2.1.3. Promote improved utilisation of crop residues and planted pastures, where appropriate	DEES DEES & DART DEES & DART



Objective 2: The effectiveness and efficiency of cattle production is increased

Strategy	Major Action	Resp
2.2. Improve herd efficiency	2.2.1. Promote husbandry practices 2.2.2. Promote herd health, including prevention of venereal diseases 2.2.3. Promote improved breeding and selection practices	DEES, DART & Mentors DEES, DVS & Mentors DEES, DART & Mentors



Objective 2: The effectiveness and efficiency of cattle production is increased

Strategy	Major Action	Resp
2.3. Strengthen individual land tenure in the NCA (e.g. SSCF model of MLR)	2.3.1. Demarcate and develop farms 2.3.2. Train farmers in commercial cattle production and sound rangeland management practices. 2.3.3. Provide efficient and effective mentoring support	MLR MAWF & MLR MLR & MAWF



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.1. Increase capacity of Meatco abattoirs	3.1.1. Expand chilling/freezing capacity of Meatco abattoirs at Oshakati and Katima to accommodate supply in peak seasons 3.1.2. Conduct a cost benefit analysis of full slaughtering during the growing season versus the current situation in Caprivi	Meatco Meat Board



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.2. Improve efficiency and use of other existing smaller abattoirs (e.g. Katima, Rundu, Oshakati, etc.)	3.2.1. Facilitate the renovation of buildings 3.2.2. Provide training to management 3.2.3. Regulate/control hygiene at abattoirs	Meat Board Meat Board DVS, Local Gov



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.3. Upgrade Eenhana and Outapi abattoirs and support the processing of meat products at the Ongwediva Fresh Produce hub	3.3.1. Upgrade capacity of abattoirs	MAWF & NDC
	3.3.2. Link abattoirs to Ongwediva Fresh Produce Hub	MAWF
	3.3.3. Contract company for operations	MAWF
	3.3.4. Ensure quality and efficiency of operations	MAWF



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.4. Assess the Meatco strategy of providing incentives for bigger carcasses	3.4.1. Conduct study on impact of carcass size and conformation (thus animal size and body type) on sustainability (environmental & economic) of cattle production in the NCAs	Meat Board



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.5. Enlarge the marketing “window” of cattle	3.5.1. Improve rangeland condition and productivity (see 2.1.)	DEES & DART
	3.5.2. Promote the provision of supplementary feeding (e.g. licks)	DEES & DART
	3.5.3. Operate “holding farms” to retain over supply for periods of under supply	Meatco



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.6. Promote the supply of younger animals to abattoirs	3.6.1. Use redundant quarantine farms to grow out weaners for slaughter markets 3.6.2. Sensitise farmers to market weaners as an additional marketing option	Meat Board DEES/DART & Auctioneers



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.7. Promote big and small auctions	3.7.1. Expand bigger auctions to more venues over the NCA 3.7.2. Introduce regular smaller auctions with involvement of local private entrepreneurs	Auctioneering Agents/NNFU Meat Board



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.8. Improve marketing infrastructure	3.8.1. Improve access to existing multi-purpose handling facilities, especially at loading ramps	Meat Board
	3.8.2. Construct additional multi-purpose handling facilities, also in Caprivi	Meat Board
	3.8.3. Convert multi-purpose handling facilities to accommodate smaller auctions (e.g. water supply and holding pens)	Meat Board
	3.8.4. Procure additional 6x6 cattle truck(s) with moveable loading facility	Meatco
	3.8.5. Construct loading facilities in Mangetti area	Meat Board



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.9. Improve management in quarantine facilities (in Caprivi)	3.9.1. Outsource operations of quarantine farms to farmers unions.	DVS
	3.9.2. Upgrade infra-structure at quarantine facilities, especially water provision at remote camps	DVS
	3.9.3. Train staff and implement sound rangeland management plan (e.g. CBRLM)	DEES/NNFU
	3.9.4. Monitor implementation of sound rangeland management	DEES/NNFU
	3.9.5. Investigate viability of transport vs. trekking from farm gate to quarantine facility in terms improved economics	Meat Board



Objective 3: Marketing (locally and internationally) is enhanced

Strategy	Major Action	Resp
3.10. Continue to develop the Commodity Based Trade approach.	3.10.1. Complete phase 1 (Planning and investigation)	Meat Board
	3.10.2. Complete phase 2 (Testing, piloting and looking for markets)	Meat Board
	3.10.3. Lobby for implementation in other NCA regions	Meat Board



Objective 4: Trans-boundary disease status in NCAs enhanced and maintained

Strategy	Major Action	Resp
4.1. Develop and implement animal disease management and eradication strategies focussed on FMD and CBPP.	4.1.1. Establish and maintain zones in the NCAs for the progressive control of FMD and CBPP	DVS
	4.1.2. Erect temporary fences, with consent of local communities, to protect the above mentioned zones	DVS
	4.1.3. Strengthen existing monitoring and surveillance systems	DVS
	4.1.4. Develop and implement credible livestock identification and traceability systems	DVS
	4.1.5. Strengthen and extent the scope of current animal disease contingency plans	DVS
	4.1.6. Establish and equip an emergency animal health response unit.	DVS
	4.1.7. Provide meat inspection services at local slaughter facilities.	DVS
	4.1.8. Establish a multipurpose vaccine institution to develop and produce CBPP and FMD vaccines	DVS



Objective 4: Trans-boundary disease status in NCAs enhanced and maintained

Strategy	Major Action	Resp
4.1. Develop and implement animal disease management and eradication strategies focussed on GMD and CBBP.	4.1.9. Harmonise animal health status with neighbouring countries	DVS
	4.1.10. Improve infra-structural and personnel capacities	DVS
	4.1.11. Identify, investigate and promote high value markets for Namibian livestock and livestock products.	DVS



Objective 5: Proper monitoring, evaluation and adjustment are done

Strategy	Major Action	Resp
5.1. Coordinate the implementation of the master plan through the National Livestock Marketing Consultative Forum	5.1.1. Put in place a task force to drive the implementation of the master plan	Meat Board
	5.1.2. Develop operational plans at regional level in the NCAs	Meat Board
	5.1.3. Change mandate of NCA LMCF from consultative to implementation function	Meat Board
	5.1.4. Re-constitute NCA LMCF to include all relevant stakeholders	Meat Board
	5.1.5. Provide operational budget to NCA LMCF to operate at regional level	Meat Board
	5.1.6. Develop and implement process monitoring and evaluation plan	Meat Board



Objective 5: Proper monitoring, evaluation and adjustment are done

Strategy	Major Action	Resp
5.2. Coordinate impact monitoring	5.2.1. Develop and implement an impact monitoring plan based on master plan log frame and using Namlits	Meat Board



Objective 6: Policy environment for increased off-take of cattle and cattle produce is enhanced.

Strategy	Major Action	Resp
6.1. Review current policies and legislation regarding cattle production in the NCA	6.1.1. Conduct comprehensive policy and legislative review 6.1.2. Develop new policies and legislation to fill gaps	Meat Board/MAWF Meat Board/MAWF

The Way Forward

- Operationalize the master plan at NCA LMCF level
- Develop operational plans at regional level with involvement of all stakeholders
- Start with implementation
- Conduct regular M&E&A