Common Vision of the Livestock & Meat Industry of Namibia

Strengthening Cooperation towards a Shared Plan for Economic Growth

January 2015
Foreword

Message by Minister of Agriculture, Water and Forestry, Honourable Mutorwa

The Common Vision of the livestock and meat industry was finalised at a livestock and meat industry forum meeting late 2013. After years of laborious debate and drafting of each sectors’ position papers given an unnecessary period of fragmentation, mistrust, friction and self-interest between role players, this vibrant and successful workshop with all the major roleplayers in attendance concluded the finalization of the Common Vision. Representation of the Ministries of Agriculture, Water and Forestry, Trade and Industry, Finance and state owned enterprises such as the National Planning Commission, Competition Commission, National Trade Forum, as well as the Millennium Challenge Account and European Union together with industry organisations such as the Namibia Agricultural Union, Namibia National Farmers Union, Abattoir Association of Namibia, Livestock Auctioneers, Brokers and Traders Association, Namibia Manufacturers Association, Agricultural Trade Forum participated in the deliberations. I wish to congratulate the Meat Board in facilitating the process to solve industry threats and trends through dialogue between the parties rather than to tasked authorities to make industry decisions. The meat industry in this manner will proof its maturity and focusses on growing the meat industry to Namibia and its citizens. I herewith tasked the Forum to frequently debate and focus on the most important actions for immediate execution. I therefore wholeheartedly support the implementation of the Common Vision and will direct the Ministry of Agriculture, Water and Forestry staff to assist the diligent implementation of the Common Vision.
Message by Meat Board Chairperson, Ms Gurubes

The livestock and meat industry is known for its challenges, of which the diminishing contribution of the livestock and meat sector to the Gross Domestic Product is of great concern. It can be segregated into various factors such as bush encroachment, diversification to wildlife utilisation and other farming activities as well as the introduction of resettlement farmers which mainly is involved in a cow-calf production system. To exploit and service markets sustainably, larger volumes of meat, especially from north of the veterinary cordon fence should be produced. South of the veterinary cordon fence the focus should be on achieving higher efficiencies in terms of production. Worldwide is the demand for meat growing, and considering that the world population is growing at an alarming rate which necessitates the production of 50% more food, Namibia is ideally positioned to make its humble contribution in feeding the world. The Common Vision is an important process to sustainably grow the Namibian meat industry competitively, not only to the industry but also to the entire country. It is my hope that the public and private sector can work together in achieving step by step the most important actions depicted in the Common Vision and that own interest should be set aside to the benefit of the Namibian meat industry and entire country.
Statement by the Permanent Secretary of the Ministry of Agriculture, Water and Forestry

(This statement was made on the occasion of a workshop to finalise a joint vision for the Namibian Meat Industry 4 July 2013)

Dear

Master of Ceremonies
Chairperson of the Meat Board
President of the Agricultural Unions
Chairpersons of industry associations
Esteemed industry leaders
Government staff
Participants

It is indeed a pleasure and it is sincerely appreciated to present the opening statement to such an important meeting of the meat industry. It is furthermore highly valued that so many role-players from various spheres of the meat industry see the importance and wish to find a joint vision for the Namibian meat industry. The Ministry of Agriculture, Water and Forestry can no other than give its full support to such an initiative.

It is common knowledge that the meat industry plays an indispensable role in the agricultural sector of Namibia not only in terms of rural stability, but also in terms of foreign income generation and employment creation. It is therefore crucial that the sector is nurtured and the environment is created by government to ensure continued prosperity and growth. We are all familiar that Government have a multitude of priorities to address and do not necessarily always have the means to focus on pertinent issues identified by the meat industry, thus the dire need exists to work together – government and the meat industry – to find common ground and practical solutions at hand of issues facing the meat industry.

I am familiar and indeed disturbed by the fact that the meat industry during the past few years is declining in terms of the annual production of livestock and meat for both the cattle and sheep sector. It is hoped that a meeting of this nature could provide solutions and assist government in reversing the decline. I understood that various factors can be attributed to these trends, amongst others the profitability of farming, resulting most probably from aspects such as bush encroachment, predators, export restrictions, low prices and other more financially viable farming activities. Government and the industry urgently need to address these threats.

Being informed of the process followed to reach the Common Vision, it is praised that the different role-players could reach consensus thus far. Perusing through the Common Vision, the Critical Success Factors and Action Plans identified do not differ from the intentions of Government or the Ministry as identified in the country’s National Development Plan 4 towards the achievement of Vision 2030. It is only a question of debating and establishing priorities to be pursued and adhered to – a forum of today would be the most beneficial platform for such an exercise. It is my humble opinion that each of us should strive in improving the prosperity of all
Namibians and that wealth is not located in the hands of a few citizens and that the Common Vision has such value to assist Government in doing so.

The Common Vision identified five critical areas, namely animal health, livestock production, marketing, value addition and industry consolidation and then specific issues such as development and growth of the livestock sector north of the veterinary cordon fence. All are extremely important critical areas, and I would like to take the opportunity to highlight some inputs provided by the Ministry.

The maintenance of Namibia’s animal health status is of crucial importance in accessing the lucrative markets of the European Union, Norway and South Africa and the Ministry is currently engaged in negotiating SPS protocols with the United States of America, China and Russia. It will broaden the country’s scope in accessing markets and hopefully achieve higher returns to the meat industry. However, it is a necessity that livestock and meat production is increased to service those markets and that the limitations preventing further meat production growth is determined and removed. A forum such as this has the ability to provide the required information and inputs to take the actions further.

It brings me to the development of livestock and meat production north of the Veterinary Cordon Fence. The Ministry with the support of the Millennium Challenge Account is preparing the area, with the exception of the Caprivi to obtain an internationally recognised animal disease status. More so it intends to establish total Foot and Mouth Disease and Lungsickness freedom. By achieving an internationally recognised status it is envisaged that more markets will be accessible. I am therefore also pleased with the initiative of the Meat Board in addressing beef exports from the Zambezi. The Zambezi region is prone to FMD outbreaks and thus being unable to access lucrative markets. It is hoped that this project will provide the necessary internationally recognised evidence that beef produced from the Zambezi is safe and would not induce a human or animal health risk.

The Ministry is familiar with the despair in especially the sheep sector given producer prices paid by local sheep export abattoirs and which is aggravated by the present drought and initiated the much awaited Value addition study. The study is in its final stages and preliminary results have been presented to the Implementation and Monitoring Committee. Some of you are represented on this Committee. The outcome of the preliminary results will also influence the deliberations of today. The study indicated that export restrictions in the form presently being applied is counterproductive and that an incentive-based intervention is needed. The Report will be finalised within the next few weeks after which the IMC will present the Report and recommendations to the respective Ministers for the way forward.

To conclude, I appreciate the initiative of the Meat Board with the meat industry and wish the meat industry – now together with Government inputs – all the success with the deliberations and look forward to receive the final Common Vision.

I thank you.

**Joseph Iita**

Permanent Secretary
Ministry of Agriculture, Water and Forestry
Executive Summary

The importance of the livestock and meat industry to the Namibian economy and the wellbeing of the farming and the rural communities are known. However, the industry holds a potential to further growth through better integration of production, processing, distribution and marketing. Stakeholders and sectors of the industry find themselves at various levels of development, degrees of sophistication and adoption in the value chain. This results in opposing interests. In addressing the situation the industry realizes the need to collectively work towards a common vision, namely the creation of an environment conducive to the expansion of industry as a whole, growth of the sectors within the industry, and the promotion of the wellbeing of its members. There is a need for an overall industry planning and co-ordination among stakeholders. To this end the founding of an industry forum is the basis for establishing a structure to regularly communicate accurate and relevant information. A major goal of such forum is the creation of a common vision and action plan aiming at empowerment of its members through improved participation of stakeholders.

Initiated by the Meat Board of Namibia, stakeholders met 4 July 2013 and compiled a Common Vision and Action Plan for the livestock and meat industry. The Meat Board’s Strategic Plan and the National Development Plan served as the point of departure for the Common Vision.

The objective of the Common Vision is to strive towards a common goal for the industry through converging diverse interests in a balanced way into a single livestock and meat industry accepted vision and action plans in the best interest of the industry as a whole and Namibia at large.
The Common Vision was developed through numerous separate stakeholder consultations, as well as entire meat industry forums. Various stakeholders and role-players presented their inputs in achieving the Common Vision.

The Common Vision addresses five action plans important to the livestock and meat industry:

- Animal Health and Welfare and Food Safety
- Production
- Value addition
- Marketing and Product Trade
- Industry Consolidation

Three result targets with separate success measures for each action plan were developed and responsibilities identified. The Meat Board with the support of a Technical Committee comprising national representative bodies will act as coordinator of the Common Vision and oversee implementation. A livestock and meat industry forum will meet biannually to establish progress and develop strategies to achieve the common vision. As the environment in which the livestock and meat industry operates is changing constantly, so would be the Common Vision. This edition, however, can be regarded as the beginning of a process to grow the Namibian livestock and meat industry and as the environment changes, new action plans and result targets will be added or removed.
# Glossary of Terms

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
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<tbody>
<tr>
<td>AHCF</td>
<td>Animal Health Consultative Forum</td>
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<tr>
<td>AU</td>
<td>African Union</td>
</tr>
<tr>
<td>CBPP</td>
<td>Contagious Bovine Pleuro-pneumonia</td>
</tr>
<tr>
<td>CBT</td>
<td>Commodity Based Trade</td>
</tr>
<tr>
<td>DEES</td>
<td>Directorate of Extension and Engineering Services</td>
</tr>
<tr>
<td>DoP</td>
<td>Directorate of Planning</td>
</tr>
<tr>
<td>DRT</td>
<td>Directorate of Research and Training</td>
</tr>
<tr>
<td>DVS</td>
<td>Directorate of Veterinary Services</td>
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<tr>
<td>EPA</td>
<td>Economic Partnership Agreement</td>
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<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>FAN Meat</td>
<td>Farm Assured Namibian Meat Scheme</td>
</tr>
<tr>
<td>FMD</td>
<td>Foot-and-Mouth-Disease</td>
</tr>
<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
</tr>
<tr>
<td>GRN</td>
<td>Government of the Republic of Namibia</td>
</tr>
<tr>
<td>HACCP</td>
<td>Hazard Analysis &amp; Critical Control Point</td>
</tr>
<tr>
<td>IMC</td>
<td>Implementing and Monitoring Committee</td>
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<tr>
<td>LPF</td>
<td>Livestock Producers Forum</td>
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<tr>
<td>MAWF</td>
<td>Ministry of Agriculture, Water and Forestry</td>
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<tr>
<td>MBN</td>
<td>Meat Board of Namibia</td>
</tr>
<tr>
<td>M&amp;E</td>
<td>Monitoring and Evaluation</td>
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<tr>
<td>MET</td>
<td>Ministry of Environment &amp; Tourism</td>
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<tr>
<td>MoHSS</td>
<td>Ministry of Health and Social Services</td>
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<tr>
<td>MoF</td>
<td>Ministry of Finance</td>
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<tr>
<td>MTi</td>
<td>Ministry of Trade and Industry</td>
</tr>
<tr>
<td>NCA</td>
<td>Northern Communal Areas</td>
</tr>
<tr>
<td>NDP</td>
<td>National Development Plan</td>
</tr>
<tr>
<td>NLMC</td>
<td>National Livestock Marketing Committee</td>
</tr>
<tr>
<td>NPC</td>
<td>National Planning Commission</td>
</tr>
<tr>
<td>OIE</td>
<td>World Organisation for Animal Health</td>
</tr>
<tr>
<td>RSA</td>
<td>Republic of South Africa</td>
</tr>
<tr>
<td>SACU</td>
<td>Southern African Customs Union</td>
</tr>
<tr>
<td>SADC</td>
<td>Southern African Development Community</td>
</tr>
<tr>
<td>SME</td>
<td>Small and Medium-Size Enterprises</td>
</tr>
<tr>
<td>SPS</td>
<td>Sanitary and Phyto-sanitary</td>
</tr>
<tr>
<td>TAD</td>
<td>Transboundary Animal Diseases</td>
</tr>
<tr>
<td>VCF</td>
<td>Veterinary Cordon Fence</td>
</tr>
<tr>
<td>WEF</td>
<td>World Economic Forum</td>
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Rationale for a Common Vision of the livestock and meat industry

The Meat Board of Namibia has, as part of its mandate, initiated the compilation of a common vision for the livestock and meat industry. The Common Vision is a live document intended to state the focus areas that the industry regards as important in order to achieve growth for the Namibian livestock and meat industry as set out in Vision 2030 and in the “Growth at Home” strategy of the Ministry of Trade and Industry. The Common Vision is based on the consensus opinion of the industry role-players with the aim to give direction and alignment to a diverse and important industry and aims at balanced and co-ordinated actions by all role-players to attain a higher level of development.

Importance of the livestock and meat industry

The livestock industry is of fundamental economic importance. In Namibia, the agricultural sector supports approximately 70% of the country’s population directly or indirectly through income and employment. The livestock sector further accounts for 80% of all agricultural production in Namibia. Approximately 60% of households own cattle, including nearly 40% of poor households. Even though the contribution of the livestock sector decreases in its share of the total GDP, it is showing a positive real growth since independence and contributes almost 4% to the country’s GDP. This is achieved mainly through its export-oriented production base with 80% of the annual production being exported, which in addition makes it also an important foreign exchange earner.

<table>
<thead>
<tr>
<th>Export-oriented: 85% of production is exported value - N$2.0 billion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cattle</strong></td>
</tr>
<tr>
<td>• 150,000 weaners (months 180-240kg) RSA feedlots (2012 - 132,449 weaners)</td>
</tr>
<tr>
<td>• 140,000 slaughter cattle EU export abattoirs - Meatco &amp; Witteve (2012 - 102,980 slaughtering cattle)</td>
</tr>
<tr>
<td><strong>Beef (included in “Cattle”)</strong></td>
</tr>
<tr>
<td>• 9,400 tons - South Africa (eg Woolworths) (2012 - 7,163 tons)</td>
</tr>
<tr>
<td>• 9,500 tons - EU (UK, Finland, Denmark &amp; Norway) (2012 - 9,563 tons)</td>
</tr>
</tbody>
</table>

Livestock production in context

In Namibia, rainfall (and its variability) dominates all other climatic factors. This is the most important reason for the diversity of farming systems in the country making livestock farming often the only viable option for land-use in vast parts of the country. In addition, however, the limiting effects of aridity and poor soils are that livestock production rates are much lower than in most other countries.

Of the 2.9 million (2012) cattle in Namibia, approximately similar numbers to the north (1,472,542) and to the south (1,431,911) of the veterinary cordon fence occur. Small stock is predominantly south of the VCF totalling about 2.7 million (2012).

Namibia produces a combined total of 85,000 tons of beef, lamb, and goat meat annually. Approximately 80% of this production is exported to neighbouring southern African countries and to the European Union.
Based on a 5-year average, Namibia exported 150,000 weaners to South African feedlots. While 140,000 cattle were slaughtered locally for export as chilled and frozen meat to South Africa (9,400 tons) and to the EU (9,500 tons) and mainly to Finland, Denmark and to Norway. A total of 60,000 sheep were exported to formal and informal markets in South Africa. In terms of lamb, 850,000 carcasses went to South Africa (mainly supermarkets) while 250 tons of lamb was exported to Norway. Approximately 270,000 goats were exported to the KwaZulu-Natal province of South Africa, mainly for ceremonial purposes.

Even though Namibia’s exports of fresh/chilled and frozen beef are not even 0.5% of world exports, it ranks 29th and 35th of the top beef exporting countries (2011) for fresh/chilled and frozen beef, respectively. Namibia exports 1.4% of the total sheep and goat meat exports in the world (Total=902 000 tons) and in the list of the world top sheep and goat meat exporting countries. Namibia ranked in the 11th position.

**Employment and income generation in the value chain**

The livestock and meat industry supports 16 000 permanent and 250 temporary employment opportunities making it a very important employer in the country. Meat production and processing are envisaged to provide the largest employment opportunities in future.

Subsistence farming is the main source of income for about 29% of the national population, while in rural areas income from farming is estimated at 48% of their total income.

**Maturity within the meat value chain**

The overall maturity of the industry as well as the value chain links have been assessed in 2013. The study concludes that the livestock and meat industry leads with an advanced degree of sophistication (stage 3 out of 4 stages). Export processing and commercial production reaches stage 2, while marketing, local processing and communal production with out-dated degrees of sophistication trailing at stage 1. This finding gives strategic insights into the strategies required to advance Namibia’s livestock and meat industry to the “excellent” supply chain (stage 4) with leading edge practices based on new or emerging technologies or very innovative processes. The key differentiator for an excellent supply chain is the availability of shared public and private information in an aggregate form as a prerequisite for successful value addition.

**Stakeholders and value chain**

Various role-players representative of the value chain were involved at various stages in compiling the Common Vision for the livestock and meat industry. Most categories of stakeholders and role-players participated throughout the process. The value chain and participants are grouped as follows:
<table>
<thead>
<tr>
<th><strong>Value chain</strong></th>
<th><strong>Stakeholder/responsibility</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry</td>
<td>Meat Board of Namibia, NTF, ATF, NSBA, LIB</td>
</tr>
<tr>
<td>Legislator</td>
<td>MAWF (DVS, DoP, DEES, DART), MoF, MTI, NPC, Competition Commission</td>
</tr>
<tr>
<td>Suppliers</td>
<td>Feedmaster, Agra</td>
</tr>
<tr>
<td>Primary production</td>
<td>Commercial, emerging, communal livestock producers</td>
</tr>
<tr>
<td>Secondary production</td>
<td>Hides/skins buyers LABTA, NALETA</td>
</tr>
<tr>
<td>Processing</td>
<td>AAN, Meat processors, LAIN</td>
</tr>
<tr>
<td>Distribution, marketing</td>
<td>Wholesalers, retailers.</td>
</tr>
<tr>
<td>Consumption</td>
<td>Namibian*, RSA*, SADC*, EU*, Norwegian consumers*</td>
</tr>
</tbody>
</table>

*Did not participate in work sessions*

**Potential of the livestock and meat industry**

According to the World Economic Forum Africa Competitiveness Report (2012/13) Namibia is ranked one of the top three African countries in terms of infrastructure and ranks 47th globally on financial market development. Namibia finds itself (WEF index) in a Phase of Efficiency Driven Development and is moving towards a transitory phase of Innovation Driven Development. This ranking reveals that Namibia has a solid foundation for growth and development, yet with many challenges in the areas of education, bureaucracy and current level of development exist.

Globally, the consumption pattern of meat follows a shift from beef to poultry, ruminant to non-ruminant, and red to white meat. The reduction in red meat share of total production and consumption is prevailing in Europe and the Americas, contrasting Asia and Africa, where an increase in red meat share of production and consumption is experienced. Developing countries’ beef consumption growth has been depressed by austerity measures and health concerns. The expectation is that growth in meat production in the period to 2020 is likely to be dominated by emerging and developing countries. Against the backdrop of the above-mentioned favourable indicators, combined with the country’s advanced animal health status, ideal rangeland conditions for grazing, quality meat and a policy framework in the form of Vision 2030, NDPs and legislation, Namibia has a great opportunity to boost its livestock and meat industry.

**Shortcomings in the industry**

The identification of shortcomings of the livestock and meat industry was addressed in the Common Vision. This section summarises the major gaps and inefficiencies.

Judged by the meat value chain maturity assessment, there appears to be a lack of integration of sectors and varying levels of development within the industry are clearly visible.

- Livestock production in the NCAs needs to be main-streamed into the country’s main production system and carcass value to ensure better throughput and value throughout the value chain.
- Especially in the processing sector there is strong competition within the formal economy, while smaller processors in the informal sector do not have the ability to compete at the higher tier of businesses.
Market and consumer feedback need to direct production and processing to ensure the industry delivers customised products.

Government’s approach in terms of guiding the industry is limiting in nature and more incentives are required to promote innovation and competitiveness.

In short, strength and opportunities can be boosted and weaknesses and threats more efficiently addressed through stakeholder and role-player co-operation, consolidation, skills and resource pooling.

Policy framework

Vision 2030, NDP

With Vision 2030 and the targets of various NDPs, Namibia has a relevant policy framework that will guide agriculture and related sectors’ roles for development. This has been taken as the basis for the Common Vision. Strategies selected from Vision 2030 relevant to Land and Agricultural Production are:

- Placing emphasis on manufacturing, service provision and other secondary and tertiary activities which hold the greatest promise for economic growth.
- Encouraging local value-adding through domestic processing of meat products.
- Recognising the interdependence between agriculture and other issues, in particular, water management and biodiversity conservation.
- Encouraging rapid destocking and marketing of livestock to reduce pressure on rangelands during times of drought.

In terms of the Economic Development targets of the NDP’s, the focus is on manufacturing and the service sectors as well as rural sectors with its traditional economy to be transferred and integrated into a modern economy. The key strategies in order to achieve these targets are:

- Process natural resources and build industries in all sectors of the economy.
- Create access to abundant, hygienic and healthy food, based on food security.

Since the process of formulating the Common Vision started during the NDP 3 period the Key Result Area 5: Productive utilization of natural resources including agriculture sub-sector programmes focusing on improving livestock productivity was considered.

The National Development priorities are:

- Increasing manufacturing value by stimulating productivity and increasing exports.
- Diversifying and integrating the economy through accelerated growth of the industrial sector and the creation of better links between its sub-sectors.
- Generating productive employment and increased income opportunities for Namibians.
- Improving geographical distribution of industry in relation to raw materials, markets, population and employment demand.
- Continuing research in the manufacturing sector in order to identify bottlenecks and possible means to overcome them.

Agriculture, will continue to be a development priority under NDP 4 and will still remain a backbone of the Namibian economy. Growth Targets from the NDP 4 were taken as a test for the Common Vision. The following Growth Targets were considered:
For agriculture an average real growth of 4% per annum with livestock farming projected growth of 4% per annum up to 2016/17.

For manufacturing an average real growth of 8% per annum with meat processing projected growth of 5.3% per annum up to 2016/17.

The sectors identified for industrial development assistance and which are of significance to the livestock industry are food processing and leather and leather products.

Linkage to the MAWF strategic plan and sector execution plans

The livestock and meat industry’s Common Vision does not exist in isolation, and therefore strives to be aligned with the Ministry of Agriculture, Water and Forestry’s Strategic Plan. Furthermore, most activities of the Common Vision are incorporated in the Agricultural Sector Execution Plan which should be updated in the Annual Sector Execution Plans of the NPC.

Policies, cabinet decisions

In the execution of the Common Vision the onus will be on the stakeholders, role-players and implementers to operate within national policies. The major policies relevant to the livestock and meat industry are:

- National Agricultural Policy 1995
- National Agricultural Strategy 1996
- Namibia Public Private Partnerships Policy
- Namibia’s Industrial Policy
- Namibian Agricultural Marketing and Trade Policy and Strategy, 2011
- Policy for the Eradication of Trans-Boundary Animal Diseases in Northern Communal Areas
- Special Incentives for Manufacturers and Exporters, 1999

In addition to the above, a range of Cabinet decisions guiding implementation of the Common Vision will also be considered. The more important decisions are Decisions 22nd/17.09.02/007 and 29th/14.10.03/009 expressing concern about the lack of feedlots and low capacity utilisation of domestic abattoirs and tanneries, the local pricing system and provision for exports with certain conditions of livestock, hides and skins with the aim of promoting local value addition. These decisions need to be read together with decisions and directives on sheep (6th/17.04.07/007 and 6th/22.06.10/006) and cattle (9th/18.06.13/017) exports.
## SWOT analysis

A SWOT analysis was conducted. The following table contains the various elements and their descriptions.

### SWOT analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The following strengths were identified:</strong></td>
<td><strong>The following weaknesses were identified:</strong></td>
</tr>
<tr>
<td>1. Animal Health &amp; Meat Standards</td>
<td>1. Industry Research Capacity</td>
</tr>
<tr>
<td>* Namibia has a world-class commercial meat industry that pursues international standards</td>
<td>* A lack of new technologies and industry research capacity hinders development</td>
</tr>
<tr>
<td>2. Natural Production Environment</td>
<td>2. Inconsistency of Supply</td>
</tr>
<tr>
<td>* The natural production environment and growth stimulant free meat makes Namibian meat attractive to niche markets</td>
<td>* All year availability of product is not guaranteed, with quality and quantity inconsistencies experienced</td>
</tr>
<tr>
<td>3. High standard of accredited export facilities</td>
<td>3. Industry Fragmentation</td>
</tr>
<tr>
<td>* Quality infrastructure and established processing capacity for export of high quality meat</td>
<td>* A lack of mutual trust and perceived unfairness within the value chain leads to fragmentation</td>
</tr>
<tr>
<td>4. Quality Product</td>
<td>4. Responsiveness to Market</td>
</tr>
<tr>
<td>* Quality, tasty, export standard, sought after meat product is delivered</td>
<td>* Production does not always meet market requirements, which in turn are not communicated clearly</td>
</tr>
<tr>
<td>5. Well-regulated &amp; Organised Industry</td>
<td>5. High Operating Costs</td>
</tr>
<tr>
<td>* A well-organised commercial farming and meat industry exists with industry regulation</td>
<td>* High price of raw materials, cost of production and distance to market undermines competitiveness (versus game, hospitality)</td>
</tr>
<tr>
<td>6. Sufficient Supply</td>
<td>6. Political &amp; Environmental Factors</td>
</tr>
<tr>
<td>* There is availability of a variety of raw material: sheep, beef and game</td>
<td>* Lack of agreement between industry over incentives, levies, taxes and regulation</td>
</tr>
<tr>
<td>7. Market access</td>
<td>7. Communal production</td>
</tr>
<tr>
<td>* Namibian meat has preferential market access supported by EU/ RSA approved export abattoirs</td>
<td>* Communal production hampered by multiple factors, e.g. ownership, extension services, traditions, telecommunication,</td>
</tr>
<tr>
<td>8. Government access</td>
<td>8. Livestock Marketing infrastructure</td>
</tr>
<tr>
<td>* Approachable government sector to discuss industry issues</td>
<td>* Livestock marketing infrastructure is lacking in communal areas</td>
</tr>
<tr>
<td></td>
<td>9. OIV Capacity</td>
</tr>
<tr>
<td></td>
<td>* OIV capacity constraints risk animal disease status &amp; traceability</td>
</tr>
<tr>
<td></td>
<td>10. Processing quality standards</td>
</tr>
<tr>
<td></td>
<td>* A need exists for uniform national processing quality standards</td>
</tr>
<tr>
<td></td>
<td>11. Industry Skills</td>
</tr>
<tr>
<td></td>
<td>* Overcapacity of slaughter facilities in light of production decline, while additional facilities are added</td>
</tr>
<tr>
<td></td>
<td>12. Lack of Diversification</td>
</tr>
<tr>
<td></td>
<td>* Internal inability to diversify products and markets</td>
</tr>
</tbody>
</table>
SWOT analysis

**Opportunities**

1. Market Expansion
   * New market access opportunities
2. Capacity Consolidation
   * Consolidation of resources can improve productivity, skills and technology
3. Production Increase
   * Availability of genetic material, debushing, and tenure creates production increases
4. Stakeholder Engagement
   * The creation of mutual trust between all stakeholders will strengthen the industry
5. Value Addition
   * Further value addition in Namibia and export of value added products exist
6. NCACattle
   * Improving NCAN animal health status
7. Shared Vision
   * A supported, shared industry vision will improve collaboration
8. Industry Diversification
   * Various opportunities for new sub-industries exist, e.g., pork & game
9. Certified Organic
   * A Certified Organic Production System could be established
10. Consumer Education
    * Promotion of safe and wholesome meat to local consumer

**Threats**

1. Lack of coordination between stakeholders
   * Risk of industry unfriendly policies if uncoordinated planning takes place and risk of poor implementation if policies are not aligned.
2. Animal Health Deterioration
   * Loss of export status due to animal health issues
3. Cross-border Economies of Scale
   * Cross-border competition creates an uncompetitive advantage to RSA feedlots
4. Road, telecoms & water infrastructure
   * Decay of basic infrastructure to production
5. Importing country standards
   * Importing country standards are becoming more strict and difficult and are costly to comply with
6. External Factors
   * Systemic risks - economic climate, climate change, exchange rates and natural causes, e.g., floods, droughts
7. International Competition
   * Increased international competition
8. Declining Production Volumes
   * Declining volumes mean full utilisation of facilities not possible
9. Price Volatility
   * Prevents industry development

Action plan implementation and review process

1. Inform industry bodies of actions
   - Inform meetings of industry vision and actions
   - Request information on key indicators
   - Provide information on request

2. Compile mid-year progress reports
   - Compile summary reports from [1] above on actions directly relevant to industry action plans
   - Submit to Meat Board for dissemination

3. Meet annually with industry to give feedback
   - Submit to Meat Board for dissemination
   - Present progress summaries at annual industry vision sessions
Common Vision for the Namibian livestock & meat industry

As stakeholders and role-players in the Namibian livestock and red meat value chain, our vision is...

A uniquely Namibian, dynamic and sustainable livestock and meat industry, providing sought after quality products in the most viable markets to the benefit of all Namibians.

The livestock and meat industry of Namibia’s mission is to...

- Market a globally renowned, traceable, safe and quality product, produced in a natural and well-regulated environment, under various farming systems following good agricultural practice
- Maintain and improve the animal health status in Namibia with special emphasis on the NCA
- Increase and improve the production and marketing / off-take of livestock
- Maintain existing and expand into local and new regional and premium international markets
- Determine, define and implement the optimum value chain for Namibian conditions
- Ensure efficiency by creating a balance between processing capacity with production output
- Strengthen mutually beneficial and cooperative relationship with all stakeholders
- Ensure compliance with ethical meat production requirements, including sustainable production, animal health and welfare, traceability, good labour relations practices and adherence to public health standards.
Action plans

The Common Vision comprises five critical areas as identified by stakeholders and role-players as Action Plans. The results targeted are expected to be accomplished by predetermined dates. Equally, the actions under each targeted result should be attained during the same period, although some activities are of an ongoing nature. The critical areas and results targeted are as follows:

Critical result 1: Animal health & welfare and food security

<table>
<thead>
<tr>
<th>Top 3 results targeted</th>
<th>Success Measures</th>
<th>Top 3 Actions for each Result</th>
<th>Responsibility</th>
<th>Timing</th>
</tr>
</thead>
</table>
| 1. Animal health status and animal welfare in the FMD free zone improved and maintained | • Maintained listing by the OIE as FMD free zone where vaccination is not practised  
• Reduced occurrence of trade-sensitive diseases that restrict exports  
• Increased exports attributed to improved animal health status  
• Successful animal health audit by major trading partners  
• Animal health import requirements by major trading partners met | 1. Strengthen veterinary services and improve access to animal health services  
2. Engage stakeholders effectively  
3. Improve biosecurity measures including and maintaining border fences and the VCF  
4. Update disease emergency plans and ensure stakeholder preparedness  
5. Update and enforce animal welfare legislation and ensure stakeholder awareness | MAWF - DVS, i n close consultation with industry stakeholders  
MAWF - DVS  
Animal Health Consultative Forum  
DVS communication strategy  
MAWF - DVS and industry stakeholders  
MAWF – DVS  
MBN  
Farmers  
Livestock industry | Immediate implementation  
Ongoing  
Action plan and allocation of tasks to be finalised end of December 2015  
30 November (Annually)  
New legislation by 30 November 2016  
Enforcement and raising awareness - ongoing |
<table>
<thead>
<tr>
<th>Top 3 results targeted</th>
<th>Success Measures</th>
<th>Top 3 Actions for each Result</th>
<th>Responsibility</th>
<th>Timing</th>
</tr>
</thead>
</table>
| 2. Animal health status and animal welfare in the NCAs improved and maintained | • OIE recognition of FMD freedom except the infected zone  
• Official declaration that CBPP has been eradicated  
• Fresh beef exports from Zambezi Region attributed to improved animal disease and food safety management  
• 23-day post-slaughter holding period lifted  
• Reduced frequency of occurrence of FMD in Zambezi  
• Reduced occurrence of trade sensitive diseases restricting exports  
• Increased exports attributed to improved animal health status  
• Maintained listing by the OIE as FMD free zone where vaccination is not practised  
• Successful animal health audit by major trading partners  
• Animal health import requirements by major trading partners met | 1. Implement the strategy to achieve FMD and CBPP freedom without vaccination  
2. Implement HACCP/ CBT approach for Zambezi Region  
3. Strengthen veterinary and extension services and improve access to animal health services  
4. Review and update disease emergency plans and ensure stakeholder preparedness  
5. Improve management of disease outbreaks | MAWF - DVS with industry input  
Abattoir operators  
MAWF - DVS  
MBN  
MAWF - DVS with industry input  
MAWF - DVS | 2015 - 2020  
2015  
2017  
Ongoing  
Ongoing |
| 3. Credibility of the Farm Assured Namibian Meat Scheme enhanced | • FAN Meat Scheme certified as quality assurance scheme  
• Successful audit of FAN Meat Scheme by major trading partners  
• FAN Meat Scheme recognised as equivalent to standards set by major retailers in high value markets | 1. Implement ISO 9001 certification of the FAN Meat Scheme  
2. Implement revised FAN Meat Scheme standards across the value chain  
3. Engage stakeholders effectively to ensure understanding and compliance | Meat Board and industry  
FAN Meat Committee  
FAN Meat Committee  
FAN Meat Committee | June 2015  
Ongoing  
Ongoing |
| 4. Hygiene and safety standards of food of animal origin improved | • Maintained listing by the OIE as FMD free zone where vaccination is not practised  
• Reduced occurrence of foodborne diseases linked to meat, milk or eggs  
• Increased exports attributed to improved food safety standards  
• Successful veterinary (meat, milk and eggs) hygiene audit by major trading partners  
• Food (meat, milk and eggs) safety import requirements by major trading partners met | 1. Strengthen and enforce food safety legislation  
2. Strengthen / consolidate hygiene inspection services for meat, eggs and milk  
3. Engage stakeholders effectively to ensure cooperation and compliance | MAWF - DVS  
MoHSS Local authorities  
MAWF - DVS  
MOHSS Local authorities  
MAWF - DVS  
MOHSS Local authorities | 2017  
2017  
Ongoing |
### Critical result 2: Production

<table>
<thead>
<tr>
<th>Top 3 results targeted</th>
<th>Success Measures</th>
<th>Top 3 Actions for each Result</th>
<th>Responsibility</th>
<th>Timing</th>
</tr>
</thead>
</table>
| 1. Create conducive policy and institutional environment to increase production | - Integrated and harmonised approach to combine efforts of all relevant role-players  
- Knowledge documented | 1. Review and amend existing policies and legislative framework (research, extension, value addition, land tenure & security, drought, etc.) and develop new ones where/when necessary | MAWF (DOP) with industry stakeholder support, Mi n of Lands and Resettlements | Q3 2015 kick-off discussions |
| | | 2. Coordinate and integrate intervention design; Increase coordination among role-players within the industry to ensure coordinated and integrated interventions. | MAWF with industry stakeholder support | TBC 2015/2016 |
| | | 3. Collect, process and share Information with industry | MAWF with industry stakeholder support | TBC 2016 / continuous |
| | | 4. Strengthen extension services | MAWF with industry stakeholder support | Continuous |
| | | 5. Develop industry strategies on drought, restocking, rebuilding | Industry stakeholders | To commence 2015 |
| 2. Increased livestock production and off-take south of VCF on an economically and environmentally sustainable basis | - Production herd increase: Cattle, Sheep, Goats, Pigs  
- Livestock off-take increased per annum: Cattle, Sheep, Goats, Pigs  
- Slaughter ox: weaner export ratio increasing per annum | 1. Implement a conducive policy framework to increase production (e.g. resettlement, export restrictions, under utilised and underdeveloped land) | MAWF, with industry input | Kickoff 2015 |
<p>| | | 2. Addressing bush encroachment (part of NRPS see 7 below) re-number to 3 | MAWF with industry stakeholder support | Ongoing |
| | | 3. Do farmer development through mentoring and farmers’ training packages to improve farming efficiencies | MAWF, with stakeholder support | Ongoing |
| | | 4. Put in place adequate national infrastructure plan (all areas) | MB | Q2 2016 |
| | | 5. Conduct predator control mechanisms | LPF, MET | Ongoing |
| | | 6. Combat stock theft | LPF | Ongoing |
| | | 7. Make use of artificial breeding techniques | | |</p>
<table>
<thead>
<tr>
<th>Top 3 results targeted</th>
<th>Success Measures</th>
<th>Top 3 Actions for each Result</th>
<th>Responsibility</th>
<th>Timing</th>
</tr>
</thead>
</table>
| 3. Improved and commercialised production in NCAs on an economically and environmentally sustainable basis | • Formal livestock off-take per annum increased to 7% in 2016  
• Ratio change of formal:informal off-take  
• NCA Abattoir capacity optimally utilised | 1. Establish and confirm NCA baseline data  
2. Improve Animal disease status by implementing TAD eradication strategy  
3. Build capacity and technical support of local farmers’ institutions | MAWF (DoP, DVS, DEES)  
MAWF (DVS) and stakeholder support  
MAWF (DEES), stakeholder support Producer organisations | Q1 2015  
End 2017  
Ongoing |
| 4. Aligned production with consumer demand | • Quality grades delivered to slaughter houses increased  
• Increased volume of high-value premium cuts to consumer  
• Best prices paid for breeding and other livestock | 1. Support production systems based on range and capacity, e.g. oxen versus weaners  
2. Implement farmer development training programmes  
3. Continuous support for genetic improvement | MAWF and stakeholder support  
Meat Board, MAWF, LPF  
NSBA, DVS | Ongoing  
Ongoing  
Dec 2015 |
| 5. Reproductive diseases addressed and combatted (also relevant to Animal Health) | • Awareness and education  
• General production increase  
• Statistics produced and updated  
• Vaccination programme implemented | 1. Launch awareness campaign  
2. Do statistical analysis of disease occurrence  
3. Test for reproductive diseases  
4. Assist farmers with annual animal health programme | LPF with industry and DVS  
DVS  
DVS with potential industry support  
DVS, LPF | Launch March 2015  
Dec 2015  
June 2015  
2015 onwards |
| 6. Efficient utilisation of slaughter capacity | • Optimal abattoir slaughter capacity defined and aligned to production | 1. Conduct capacity study to determine current and ideal capacity, given restrictions of natural vegetation  
2. Enforce basic quality standards for operation on all slaughter facilities  
3. Revisit and make adjustments to all interventions/incentives as per value-add policy developed | MB, AAN, DVS  
DVS and local authorities  
MAWF, MB | April 2016  
Ongoing  
November 2015 |
Critical result 3: Value addition

<table>
<thead>
<tr>
<th>Top 3 results targeted</th>
<th>Success Measures</th>
<th>Top 3 Actions for each Result</th>
<th>Responsibility</th>
<th>Timing</th>
</tr>
</thead>
</table>
| 1. Drafted and approved | Industry wide accepted value addition study  
Value addition study completed and implemented | 1. Value addition study conducted and approved (including agreed value addition definition) | MAWF / MTI with industry participation | October 2015 |
| 2. Value addition strategy developed and approved (in line with industrialisation policy and agricultural marketing & trade policy & strategy) | Value addition strategy accepted industry-wide  
Total value chain incorporated in strategy from birth to plate  
Product range broadened | 1. Value addition strategy developed (considering all relevant information and studies)  
2. Value addition strategy approved by Ministry upon recommendation by the industry | Meat Board with MAWF approval  
MAWF & MTI | June 2015  
August 2016 |
| 3. Value addition strategy implemented | Value addition environment created  
All role-players in value chain contribute and benefit equally  
Optimum value per species (NCA), product (e.g. bone-in), by-product (hides and skins, offal) achieved  
Product range exported expanded | 1. Creation of legal and procedural environment  
2. Remove ineffective policies/levies hampering value addition  
3. Provision of incentives including training, development, and accessing available funds for value addition activities | MAWF & MTI  
MAWF & MTI  
MAWF (MoF) / MTI | | |
| 4. Value addition impact monitored and evaluated | Livestock and meat industry growth as % of GDP | 1. Monitoring and evaluation of value addition impact | MB with independent assistance | June 2016 |
### Critical result 4: Marketing and product trade

<table>
<thead>
<tr>
<th>Top 3 results targeted</th>
<th>Success Measures</th>
<th>Top 3 Actions for each Result</th>
<th>Responsibility</th>
<th>Timing</th>
</tr>
</thead>
</table>
| 1. Diversified market portfolio available | • Entry into new markets  
• SPS agreements in place  
• Trade agreements in place  
• Bone-in lamb exports approved to EU market | 1. Negotiate continuation of existing markets with trade and SPS agreements signed | MTI & MAWF (ATF) | Ongoing |
|                        |                  | 2. Research most viable/profitable mix of existing & possible future markets | Meat Board | March 2016 |
|                        |                  | 3. Trade agreements established and negotiated by GRN; SPS agreements established and negotiated | MTI & MAWF, with assistance of ATF | Ongoing |
|                        |                  | 4. Viable markets exploited with existing and new products | Export abattoirs (AAN) & Processors (Meat Traders & Processors Association) | From Q3 2016 |
|                        |                  | 5. Follow-up, negotiate and agree on conditions | DVS | June 2016 |
|                        |                  | 6. Negotiate continuation of existing markets with trade and SPS agreements signed | MTI & MAWF (ATF) | Ongoing |
| 2. Expand into new and maintain existing premium international markets | • Maintenance of existing premium markets, EU, RSA, Norway ensured  
• Expansion of markets measured in countries and volumes exported  
• Increased off-take of export from NCA | 1. Develop market development strategy | Meat Board |        |
|                        |                  | 2. Conclusion of EPA for EU market | MTI with ATF, MAWF | Completed |
|                        |                  | 3. Quota to Norway market increased | MTI with ATF | Ongoing |
|                        |                  | 4. Finalise USA access through follow-up | MAWF | Ongoing |
|                        |                  | 5. Animal health status of NCA improved | MAWF (DVS) | 2017 |
| 3. Local markets developed and supplied with quality, healthy meat products | • Increase in formal slaughtering at all local abattoirs  
• Increase in quality and hygiene of facilities (slaughter and setting) | 1. Ensure basic standards on hygiene at abattoirs | MHSS, DVS | Continuous |
|                        |                  | 2. Create public awareness of meat quality in retail trade (Seal of Quality) | Meat Board | Ongoing |
|                        |                  | 3. Apply existing legislation | MHSS, DVS | March 2016 |
|                        |                  | 4. Review and align import policies within SACU trade agreements | MHSS, MAWF | Continuous |
| 4. Sustained domestic consumption (portfolio includes domestic market) | • Increase access for local products | 1. Get accurate local consumption statistics | Exporters, MB | Continuous |
|                        |                  | 2. Ensure even distribution of products locally. | Industry stakeholders | Continuous |
|                        |                  | 3. Diversification into other traditional products and markets | Meat Board (research) | Continuous |
### Critical result 5: Industry consolidation

<table>
<thead>
<tr>
<th>Top 3 results targeted</th>
<th>Success Measures</th>
<th>Top 3 Actions for each Result</th>
<th>Responsibility</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Effective co-operation between GRN and livestock and meat industry</td>
<td>• Fruitful quarterly meetings between Minister, presidents and Chairperson(s) held&lt;br&gt;• Meat Board regarded as a competent authority on livestock and meat industry issues</td>
<td>1. Pre-scheduled meetings between Minister(s) MAWF/MTI and leaders within the Meat Industry&lt;br&gt;2. Coordinated/consultative position on industry matters communicated to Ministry(s)</td>
<td>Minister(s) MAWF/MTI And Industry leaders Meat Board/secretariat</td>
<td>Continuous&lt;br&gt;Continuous</td>
</tr>
<tr>
<td>2. Working relationship between different industry role players, implemented</td>
<td>• Scheduled meetings between industry role players held (All, FanMeat, LM etc.)&lt;br&gt;• Conductive policies (e.g. value addition) for livestock, meat and leather industry growth implemented&lt;br&gt;• Role-player integration in value chain/decision making achieved&lt;br&gt;• Annual livestock and meat industry Forum established (strategic evaluation and positioning)</td>
<td>1. Effective quarterly meetings between Ministry(s) and Meat Industry stakeholders held&lt;br&gt;2. All interventions measured and scrutinised as per contribution to agriculture GDP (and also align with NDP_4)</td>
<td>MAWF/MTI/MB&lt;br&gt;GRN (MAWF/MTI), MB</td>
<td>Continuous&lt;br&gt;Continuous</td>
</tr>
<tr>
<td>3. Livestock and meat industry meeting/forum held</td>
<td>3. Biannual meetings within industry bodies held (with the aim to create value chain data for strategic evaluation where possible)</td>
<td>MB to coordinate</td>
<td>MB to coordinate</td>
<td></td>
</tr>
</tbody>
</table>
### Implementation of the Common Vision

The Common Vision has been adopted by role-players and stakeholders and to be endorsed by Government and is in the process of being implemented. The Meat Board of Namibia will coordinate the implementation of the Common Vision. A suitable implementation, monitoring and evaluation structure is established, capable of addressing identified action plans and reaching out to all stakeholders, role-players and sectors on a continuous basis. The institutional framework foresees structures at two tiers, the executive and industry committees.

### Structure of the meat industry Common Vision executive

At the top tier the Forum comprises a chair, vice chair and members of national representative bodies: Namibia Agricultural Union, Namibia National Farmers Union, Abattoir Association of Namibia, Meat Processors Association, Leather and Allied Industries Association of Namibia, Veterinary Association of Namibia, Namibia Manufacturers Association, Agricultural Trade Forum and persons appointed by the Ministry of Agriculture, Water and Forestry (DVS, DEES, DART), Ministry of Trade and Industry (International Trade), Ministry of Finance, National Planning Commission, Competition Commission, National Stud Breeder’s Association, Livestock Improvement Board and service providers such as Agra (Pty) Ltd, Feedmaster. Other members may be co-opted by the Forum.

### Terms of reference of executive

- Responsible for overall coordination of implementation of Common Vision
- Receive progress reports (and submissions) and review progress on implementation of the Action Plans
- Report on progress of implementation to Forum (at least) once a year
- Convene and prepare for Forum meeting for progress reporting and reviewing of Common Vision
- Meet at least twice a year to discuss report and matters of relevance
- Prepare reports/submissions for Ministers responsible for agriculture, trade and finance. Seek audience when necessary.
- Prepare report to PS MAWF on progress of implementation of actions undertaken with reference to the NDP 4 Agricultural Sectoral Execution Plans (SEP)
Structure of the Common Vision committees

At the lower tier Committees/Associations/Forums are provided for each of the five identified Action Plans, namely:

(i) Animal health & welfare and Food safety – MBN AHCF and FAN Meat Committee, (ii) Livestock production - LPF; (iii) Value addition – MBN NLM/C, (iv) Marketing & product trade – MBN NLM/C, (v) Industry consolidation – MBN NLM/C. Each Committee is duly constituted and comprises a chair, vice chair and members. Members should be experts or hold positions relevant to the critical area. Other members may be co-opted.

Terms of reference of industry committees

- Responsible for the specific Action Plan implementation
- Meet at least once a quarter to discuss progress of implementation of group’s Action Plan and matters of importance
- Convene work sessions with relevant stakeholders and role-players to receive feedback from sectors’ progress on implementation of Action Plans. Liaise with service providers and industry.
- Prepare and submit progress reports.
- Attend industry stakeholder meetings.

Management of the Common Vision

The management of the Common Vision is vested in the Meat Board of Namibia.

Financing of the Common Vision

Participation to the Forum is free. However, the meat Board will bear the expenditure for the management of the Forum.
Summary

To ensure implementation of the Common Vision, monitoring of progress is set within committees at regularly held meetings and the Forum will meet at least twice a year. Once a year all stakeholders and role-players gather to review the progress of the Common Vision and to prepare for the upcoming year.

The Common Vision does not exist in isolation, but supplements the Agricultural Sector Execution Plan of the NDP which falls under the auspices of the National Planning Commission, the Strategic Plans of the Ministry of Agriculture, Water and Forestry as well as the strategies of the Meat Board of Namibia.

The implementation of the Common Vision is the responsibility of the entire industry and not only of a selected few. Neither should it be regarded as a wish list for tasking other institutions. Should an institution not be able to fulfil its responsibilities or execute its tasks, alternative strategies should be developed. It is a document stating the focus areas that the livestock and meat industry regards as important in achieving the goals of Government - Vision 2030 and Growth at Home as well as creating the environment to allow growth for the private sector to prosper.

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Drafted in consultation with the Meat Board of Namibia, Abattoir Association of Namibia, Namibia Agricultural Union, Namibia National Farmers Union, Meat Traders and Processors Association, Leather and Allied Industries of Namibia, and Livestock Auctioneers, Brokers and Traders Association.