Development of a demonstration project to catalyse the game meat industry in South Africa

“The Wild-sourced Venison Initiative”™

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SOUTH AFRICA’S PROTECTED AREAS

• Existing protected area system:
  - Covers only 6.5% of the country’s land area.
  - Does not conserve a representative sample of the country’s biodiversity.
  - Does not adequately maintain key ecological processes across the landscape (e.g. protection of key water resources).
Policy Environment

- Convention on Biological Diversity:
  - Aichi targets – 17% of terrestrial area.

- National Protected Area Expansion Strategy:
  - Sets protected area expansion targets for all vegetation types in South Africa.
  - Protected area expansion (biodiversity stewardship) on private and communal land is identified as the primary mechanism for protected area expansion.
STATE PROTECTED AREAS

• Financial challenges:
  - Dwindling budgets of provincial and national conservation authorities.
  - Increasing need for state protected areas to become financially self-sufficient.
  - Escalating costs, particularly associated with combatting wildlife crime and rhino security.

• Co-management:
  - Estimated that one-third of all state protected areas will be subject to a successful land claim.
  - New models of co-management required that see meaningful benefits for landowners.
THE LAND REFORM CONTEXT

• Rural development and land reform:
  - Historically focussed on traditional forms of agriculture.
  - 12% of South Africa is arable.
  - Only 22% of arable land is considered high potential agricultural land (about 2.6% of South Africa’s land area).
  - 81% of the country’s total area is used for agriculture – 83% used for grazing and 17% cash crops.
  - Conventional agriculture is largely a marginal land use.
  - Issues such as land degradation, climate change and ecological resilience.
  - Biodiversity economy has the potential to reshape rural development in South Africa.
THE WILDLIFE RANCHING INDUSTRY

• Economic performance:
  - Typical game ranch generates approximately 2.5 to 3 times the economic output per hectare of conventional livestock farming.

• Employment potential:
  - Far more reliant on skilled labour than conventional agriculture.
  - Agricultural minimum wage – R2,778.83 vs. hospitality minimum wage – R3,298.52.
  - Generally a considerable increase in employment levels when there is a shift to wildlife ranching (e.g. Eastern Cape – increase in employment of 3.5 times and an average wage increase of 5.7 times).

References: Dry (2015); Sims-Castley et al. (2004); Langerholz and Kerley (2006); and Muir et al. (2011)
DEVELOPING A BIODIVERSITY-BASED ECONOMY

• Ideally placed as a development and transformation sector:
  - Strong and growing international demand for the products offered.
  - Realises the economic value of indigenous species.
  - A sustainable industry.
  - Facilitates rural economic development.
  - Has very high value-added potential.
  - High potential to earn foreign currency.
  - Enables the development of new markets and products.
THE BIODIVERSITY ECONOMY STRATEGY

• GDP growth goal:
  - By 2030 the biodiversity economy will achieve an annualised GDP growth rate of 10% per annum.

• Targets developed during the Biodiversity Economy Lab:
  - The identification and prioritisation of 10 Million Hectares for transformation of wildlife economy.
  - The establishment, development and support to new wildlife ranching entrants through infrastructure support and game donation programmes.
  - Operationalisation of eleven Biodiversity Economy Nodes (BENs) in the nine provinces of South Africa.
  - Formalising the South African game meat market and creating a network of 110 game meat processing facilities which are black-owned.
  - Unlocking the potential of protected areas.
  - Capacitating organised community structures such as Communal Property Associations and Trusts.
• Untapped potential:
  ▫ Absa Agricultural Outlook – word demand for venison 100,000 tons, supply approximately 40,000 tons.
  ▫ South Africa exports less than 2,000 tons.
  ▫ Outlook projects that between 2013 and 2020 growth in game meat products for local markets has the potential to grow by 20%.
  ▫ Export market has the potential to grow by 8%.
DEVELOPMENT POTENTIAL

• Market appeal:
  - Health – free range and organic.
  - Sustainability – sourced off of well-managed protected areas.
  - Social value – produced off of some of the poorest and agriculturally most marginal land in SA.
  - Ethical – humanely harvested in situ.

• Complementary to existing activities:
  - Tourism.
  - Hunting.

• Value-added industries:
  - Processed meats.
  - Tanning and taxidermy.
  - Décor and fashion industries.
THE WILD-SOURCED VENISON INITIATIVE

• Envisaged outcomes:
  - Comprehensive review of South Africa’s existing venison industry.
  - Review of case studies of successful market initiatives in South Africa, Namibia and Botswana.
  - Comprehensive understanding of the legal and health requirements for harvesting, meat handling, health and hygiene for domestic and export markets.
  - Development of a guideline that may become a standard – focusing on venison production off of extensive protected areas.
  - Determination of potential trial sites and implementation of the demonstration project.
  - Assessment of the social value of the demonstration project to communities.
  - Identification of the needs to take the project to scale across South Africa.
PROOF OF CONCEPT

• Development of the initiative:
  - Creation of a brand.
  - Discussions and negotiations with landowners and retail partners.
  - Development of the concept and business model.
  - Demonstration on initial sites.

• Taking the initiative to scale:
  - Buy-in to the initiative by provincial Biodiversity Stewardship Programmes.
  - Establishment of arrangements for sale of products with the retail sector.
  - Brand recognition and consumer appreciation of the venison products being sold.
  - Development of an established venison market that contributes towards meaningful sustainable rural economic development and food security, which is compatible with biodiversity conservation.
POTENTIAL DEMONSTRATION SITES

• Nambiti Private Game Reserve:
  - 9,859 ha declared nature reserve.
  - Owned by the Senzo’k uhle Nkos’uNodada Communal Trust.
  - The reserve has a monthly turnover in excess of R4 million and employs over 220 people.
  - Existing abattoir processing meat for sale to lodges and surrounding community.
  - Considerable potential for protected area expansion around the reserve.
POTENTIAL DEMONSTRATION SITES

- Somkhanda Game Reserve:
  - 11,137 ha declared nature reserve.
  - Owned by the Emvolkweni Trust, which represents the Gumbi community.
  - No existing abattoir but potential for joint-venture opportunities with surrounding reserves.
  - Protected area expansion being considered in areas towards Lake Jozini and the existing Pongola Game Reserve.
POTENTIAL DEMONSTRATION SITES

• Ithala Game Reserve:
  - 29,267 ha declared nature reserve.
  - Ezemvelo KZN Wildlife is the management authority but successfully land-claimed by neighbouring communities.
  - Co-management structures in place.
  - Considerable potential for protected area expansion north of the Pongola River.
  - Existing abattoir processing limited amounts of venison.
CONCLUSIONS

• It’s hoped that the project will:
  - Contribute towards the financial viability and self-sufficiency of protected areas.
  - Enable landowners participating in Biodiversity Stewardship programmes and state protected areas access to the market for their venison products.
  - Enable the venison products to be marketed and sold at a premium based on the ecologically and socially responsible manner in which animals have been raised and harvested.
  - Provide leverage for funding to enable communal landowners to invest in wildlife and the biodiversity economy to enable further development of the venison market.

• Ultimately it’s hoped that the project can be upscaled to each provincial biodiversity stewardship programme, which has a current footprint of approximately 800,000 ha.
Thank you

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