GLOBAL SUSTAINABILITY IMPACTS IN SOUTHERN AFRICA

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**GLOBAL COMMODITY OVERVIEW**

50% of global agricultural output in value terms will come from the **Livestock sector in the next 10 years**, currently this is 40%.

35% Tanzania holds SADC’s2 largest cattle herd of 35% but only produces 15% of the region’s beef.

6% SADC1 holds 6% of the world’s cattle population and produces 3% of the world’s beef.

THE TOP 10 beef producing countries account for 84% of global beef production and 95% of global cattle herd.
GLOBAL COMMODITY OVERVIEW

25% of dietary protein and 15% of total food energy comes from livestock.

2% South Africa is Africa’s largest beef producer, ranks 13 globally with a market share of 2%.

26% of the earth’s terrestrial surface is used for livestock grazing.

-1% SADC lost 1% of its total cattle population to the 2015/16 drought.
IT’S A REGIONAL STORY

Animal Health Disease Control Low Offtake

Mozambican beef producers challenged to assume national market

Namibia exports 315,000 cattle on the hoof

EU suspends Swazi beef imports amid foot and mouth disease fears

Botswana hopes for more beef exports

Agriculture Minister Melani Valesi confirmed the suspension in a statement on Tuesday.
CONNECTED BY CATTLE

1840
The Kololo overthrow the Lozi State

1834
The Jere (later called Ngoni) under Zwangendaba defeat the Rozwi Empire

1837
The Ndebele attacked by Afrikaners

1835
The Ngwane annihilate the Hlubi

1828
British colonial forces disperse the Ngwane

1825
The Kololo turned back by the Griqua

1823
The Ndebele attacked by Afrikaners

Groups fleeing Zulu warfare:
- Gaza
- Kololo
- Swazi
- Ngwane
- Jere/Ngoni
- Hlubi
- Ndebele
- Mfengu
- Sotho

New states established by migrating groups:
- Gaza Empire
- Swazi Kingdom
- Ngoni Kingdom
- Bulawayo
- Sotho Kingdom

Major battle involving migrating groups
THE BIGGEST ROOM IS FOR GROWTH

TRADE: REGIONAL - SADC

MOST OF SADC'S MEAT AND EDIBLE OFFAL COMES FROM WITHIN THE REGION ITSELF – THE TOP IMPORT REGIONS OUTSIDE OF AFRICA ARE EUROPE AND ASIA

<table>
<thead>
<tr>
<th>Country</th>
<th>Production ('000) '15¹</th>
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<tbody>
<tr>
<td>South Africa</td>
<td>1,039 - 58%</td>
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<tr>
<td>Zambia</td>
<td>524 - 29%</td>
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<tr>
<td>Botswana</td>
<td>64 - 4%</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>43 - 2%</td>
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<tr>
<td>Namibia, Malawi</td>
<td>41 - 2%</td>
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<tr>
<td>Total SADC</td>
<td>1,794</td>
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<table>
<thead>
<tr>
<th>Country</th>
<th>Export (US$ '000) 2016²</th>
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<tbody>
<tr>
<td>South Africa</td>
<td>43,327</td>
</tr>
<tr>
<td>Mozambique</td>
<td>41,830</td>
</tr>
<tr>
<td>Lesotho</td>
<td>37,305</td>
</tr>
<tr>
<td>Namibia</td>
<td>25,785</td>
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<tr>
<td>Swaziland</td>
<td>11,129</td>
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<table>
<thead>
<tr>
<th>Country</th>
<th>Import (US$bn) 2016³</th>
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<tbody>
<tr>
<td>Netherlands</td>
<td>101,889</td>
</tr>
<tr>
<td>Spain</td>
<td>57,104</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>46,230</td>
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<tr>
<td>Namibia</td>
<td>31,130</td>
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<tr>
<td>Belgium</td>
<td>29,395</td>
</tr>
</tbody>
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Key: Top trade flows, Top 5 export country, Top 5 import country

Footnotes:
¹ Production of beef and veal
² Top exporters meat and edible meat offal
³ Top importers meat and edible meat offal
Total and market share not provided as this had to be done on individual country analysis
**STRENGTHS**
- Agriculture is used to diversify and drive the economy
- Population growth and urbanisation is driving the consumption of beef
- Beef by-products such as offals are a delicacy in Southern Africa
- Immensely diverse and rich animal stock

**WEAKNESSES**
- Poor infrastructure and transport networks
- High cost of setting up and maintaining infrastructure
- High dependence on government and donor financial support
- Limited access to financial services
- Limited mechanisation and high use of manual labour

**OPPORTUNITIES**
- Beef will benefit regional and international export opportunities
- Beef production will be driven by increasing use of ICT
- Rural consumers will remain a dominant consumer segment
- Increased urbanisation and population growth will continue to drive demand in beef

**THREATS**
- Beef sector is vulnerable to extreme weather like El Nino and La Nino
- Food security is a major threat and challenge for the region
- Outbreaks of livestock diseases such as foot and mouth
- High probability of attacks on cattle feeds like maize/soy e.g. armyworm
- Continued keeping of cattle for prestige
THE MARKET CHAIN OF CATTLE AND GOATS IN ZIMBABWE AND MOST CRITICAL CONSTRAINTS.
Launched in Mangochi District in Malawi - 6th to 7th February 2018 Malawi, Zambia, Swaziland, Namibia, Mozambique, South Africa and Zimbabwe are the pilot countries

Main objective
- unified body regarding the beef sector involving all the participating member states.
- realizing their interdependence and come together to solving problems

Specifically the platform shall:
- Bring together and coordinate multi-stakeholder actors and interests,
- Advocate for greater recognition and investments. (Polices)
- Stakeholders will avoid replication of activities along the value chain
- Partners in the sector will have a platform where they can share experiences, lessons and challenges and have collective solutions to rescue the situation out of the threats surrounding the sector.

To date
- Regional board in place with two year mandate

Committees
- Finance and Resource mobilization
- Admin and communication
- Technical

Recruiting members across the value chain.

Countries at different levels

Consumers - Information on quality and grading of meat
- Awareness campaigns
- Marketing systems
REGIONAL DIGITAL SOLUTIONS

Live Cattle Grading
Farming Solution
Business Solution
Extension Solution
JOIN US
FOR CHANGE
THAT MATTERS