



Partnership Ready Namibia: Game Meat

Introduction

In Namibia, hunting is an integral part of a successful conservation model that benefits communities, wildlife and natural ecosystems. A strong and growing game population that is well adapted to drought and climate change characterizes wildlife.

Wildlife has been identified as a future development priority by the Namibian government as one of six selected industries where specific interventions, strategy development and support are therefore planned. The German Development Cooperation, as well as the European Union (EU) support the Namibian wildlife sector.

Until 2013, Namibian game meat was successfully exported to Europe. Between 2013 and 2019 exports were halted by the Namibian Directorate of Veterinary Services (DVS) due to process contamination with shiga toxin producing *Escherichia coli* (STEC) bacteria. With the introduction of procedures to control STEC contamination during harvesting and processing, the EU has formally endorsed Namibia's listing for game meat exports as of November 7, 2019.

Together with the Ministry of Industrialisation and Trade, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is implementing the project „Promotion of Business Advisory and Economic Transformation Services (ProBATS)“ in Namibia. This project supports Namibian companies from various sectors to open new markets, increase sales of the products and utilize the growth potential. The project supports companies with exporting game meat to the EU.

<https://www.giz.de/en/worldwide/81369.html>

Namibia is one of the few African countries that can meet the high import standards for meat products into the markets of the EU, Norway, the USA and Asia. Namibia is the only country in Africa that can export beef to these countries in accordance with the Sanitary and Phytosanitary (SPS) Measures and the high-quality standards of importers.

The industry's expertise, the relevant legislations and regulations, as well as support from public institutions are available.

In future, the support may increase, as trade promotion measures are taken, and e.g. quality management measures are supported, as well as industry promotion for game meat and higher quality game products is made available. Overall, the game meat sector could be a very successful area of diversification for the Namibian agriculture and food processing industry. To increase game meat exports to the EU, Namibian game producers and game processing companies wish to cooperate more closely with European customers.

Structure of the Game Meat Sector and its Production

The wildlife sector is divided into two sub-sectors, traditional taxidermy as the value added by the hunting industry and game meat production. Nature-based tourism (including trophy hunting) is already one of Namibia's most important growing sectors.

The Namibian industry uses the term game meat and not venison, as the meat is derived from wild game and not farmed game.

Some interesting facts:

- About 80 % of all commercial farms trade within the game industry.
- About 50% of the main income of these farms come from the wildlife industry.
- There is an increasing focus on wildlife.
- Between 2003 and 2008, the value of game meat exports tripled from 11 million Namibia Dollars (NAD) to NAD 31 million (approximately from EUR 688,000 to EUR 1.94 million).
- A further increase in exports was recorded in 2013 with exports worth NAD 50 million (approx. EUR 3.13 million).



The Directorate of Veterinary Services (DVS) resorts under the Ministry of Agriculture, Water and Land Reform (MAWLR) and is responsible for the development of guidelines, laws and regulations relevant to the safety and suitability of game meat. The Ministry for Environment, Forestry and Tourism (MEFT) is responsible for issuing permits for quotas of game to be harvested. No game may be harvested in national parks or game reserves without written permission from the MEFT.

Namibia has more than three million head of game, a number roughly equivalent to cattle, sheep and goats. The MEFT confirmed that game populations are generally increasing by 15 to 35% per year, depending on the species. The main game species in Namibia that are suitable for commercial game meat production for export are:

- Springbok (*Antidorcas marsupialis*)
- Gemsbok (*Oryx gazella*)
- Eland antelope (*Taurotragus oryx*)
- Blue wildebeest (*Connochaetes taurinus*) and
- Black wildebeest (*Connochaetes gnou*).

According to the MEFT, wildlife production has a similar commercial potential as cattle production, as more and more farmers are switching to diversification options (e.g. tourism, hunting, charcoal and game meat production).

→ „FRESH MEAT“ – HIGH QUALITY PIECES OF GAME MEAT

Fresh wild game meat, as defined by the EU, must meet the animal health requirements laid down in the legislation applicable to the respective game classification. This classification is based on the animal species and the origin of the animal. A distinction is made between fresh meat from wild game and fresh meat from farmed game.

Namibian game meat is known for its first-class and delicious taste. This is because Namibian game is free ranging.

Not all cuts of meat from wild animals slaughtered commercially for export has a high monetary value to be exported. As a rule, it is the high-quality cuts of loin and hindquarters that are exported and the lower value cuts that are sold locally for further processing.

→ AVAILABILITY – HARVESTING SEASON

The MEFT determines the harvesting season for game – it runs mainly from May 1 to August 31. These declared seasons limit the number of game animals that can be harvested each year. Game meat can, however, be frozen, ensuring year-round availability.

Springbok

Namibia is the country with the largest population of springbok in Africa. Springbok graze in large herds preferably in open grasslands, riverbeds and areas with short grass. Males weigh between 31,1 and 47,6 kg and females between 26,5 and 43,5 kg.

Gemsbok

The gemsbok is well adapted to Namibia and is the best-known species in the Kalahari. It prefers open areas to areas with increased bush density. There is no specific breeding season. Males weigh between 201 and 240 kg and females between 180 and 215 kg.

Kudu

Kudus can be found all over Africa and prefer to roam in dense bushes and wooded areas, as they navigate predominantly non-selectively. Only male Kudus have horns and they weigh approximately 250 kg in the adult state, whereas the females weigh 180 kg.

Eland

The Eland is the largest African antelope and weighs between 500 and 700 kg when fully grown. It shows no territorial behavior and grazes as a nomad without a specific habitat. Some farmers have succeeded in commercial farming with them. Eland antelopes have no specific breeding season, but most calves are observed in September and October.

Blue wildebeest

The blue wildebeest is also called white-bearded wildebeest or brindled gnu. It is a large antelope with a front-loaded appearance, and it is very muscular. Both males and females have horns. They prefer savanna areas as habitat. The blue wildebeest has a black tail, which distinguishes it from the black wildebeest. The live weight varies from 180 to 230 kg.

Black wildebeest

The white-tail-gnu or black wildebeest has a live weight of approximately 110 to 180 kg. It is characterized by its white, long, horse-like tail. It also has a dark brown to black fur and long, dark-colored hair between its front legs and under its belly. The black wildebeest feeds only on grasses.



→ PROCESSED GAME MEAT

According to the list in Part 2 of the EU Commission Decision 2007/777 (<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32007D0777&qid=1605725083547&from=EN>) Namibia is only allowed to export the following meat products to the EU besides fresh meat: Sterilized (i.e. preserved) meat, half cooked meat and biltong products (from areas south of the Veterinary Cordon Fence).

Biltong

Biltong is a form of dried, cured meat that originates from Southern Africa. Different types of meat are used for this purpose. It is only cured and dried, but not heat-treated. Biltong is preferably coated with a layer of fat, while jerky, which comes from South America, is freed of all fat. Biltong is a very popular snack, which is currently introduced to EU markets.

Namibia is not listed to import minced meat, sausages, salami (fat from pigs cannot be imported into the EU due to a possible spread of African swine fever), smoked meat or other fresh uncooked meat products with added value into the EU at the moment. Negotiations with the EU authorities must be initiated if an entrepreneur in Namibia wishes to export these products.

Local and International Marketing

Meat is a source of a variety of nutrients. Namibian game meat is well known for its low fat and high protein content.

There are ongoing developments promoting Namibian game meat as one of many diversification strategies, also to assist with food security. Game harvesting and processing is in the process of being formalized into a value chain with the support of guidelines for harvesting and processing, information manuals for farmers, veterinary supervision training, game meat festivals, proper labelling, etc.. With the availability of the EU export market for game meat diversification, opportunities in primary and secondary production are opened up.

The successful commercialization of game meat products supports local value creation and addition, economic diversification and food security.



Internationally, there is currently a revived interest in health and nutrition, as consumers prefer meat with less fat, more protein and without added hormones, resulting in game meat being viewed in a different light.

Quality Assurance

The structural and hygienic requirements, as laid down in the EU regulations on hygiene rules for food of animal origin, apply to both farms and mobile slaughterhouses. Flexibility in relation to traditional methods is allowed, especially for regions with geographical constraints, such as remote areas. Harvesting practices should not compromise food safety in any way. Game harvesters and game meat processors must comply with a food safety management system based on Hazard Analysis and Critical Control Points (HACCP) principles. These are closely monitored by the competent authorities.

→ STANDARDS

The DVS maintains a high standard of monitoring the game meat industry. The competent authority embarks continuously on the development of food safety and quality measures to ensure a high level of consumer protection with regards to food safety.

However, it remains the primary responsibility of the food business operator to ensure that food safety is not compromised at any time.

Official controls

Official controls by MEFT and DVS are carried out to verify compliance with minimum requirements by farm and food business operators.

Laws and regulations on food safety and animal welfare are relevant to the game meat industry.

- Namibian laws and regulations
- South African laws and regulations
- EU laws and regulations
- International guidelines (Codex Alimentarius, ISO)
- International food safety standards (HACCP)

Potential exporters or importers of game meat to the EU, Norway or Switzerland must be aware that all players in the value chain must comply with the required standards and regulations of the exporting and importing countries and must be certified.

Quality assurance at farm level

Namibia introduced a Farm Assurance Scheme (FAN Meat) to verify the requirements of this and other regulations at farm level. It has been supervised by the Meat Board of Namibia for more than a decade and is one of the most successful quality assurance programmes for farming on the African continent. The success of the FAN Meat Scheme has been demonstrated by maintaining international markets and achieving ISO 9001 certification.

→ EXPORT CERTIFICATE

For the export certification of wild game meat, there are critical sanitary compliances that have to be met by the DVS and food business operator. The food law of the European Union put strong emphasis on process controls – throughout the food chain – from farm to fork.

In addition to the mandatory registration and monitoring by the DVS, every game meat processing plant that wishes to export must be listed by the Directorate-General SANTE (DG SANTE, Department for Health and Food Safety of the EU Commission). This is facilitated by the DVS. With the DVS export license including the listing as an export facility by DG SANTE, the DVS export permit, the Meat Board export permit and the transport and shipping documents, the game meat can be exported to the EU. Each consignment that enters the EU must be accompanied by an original veterinary export permit.

The export permit contains information on the health and safety status of the product to be exported, the awareness of the occurrence of a specific disease in Namibia and the area of origin of the products, as well as additional food chain information required.

It is important that the importing country issues a permit to import the designated product. Only approved certified companies may export to the EU, Switzerland and Norway.



Export documentation

- DVS Export Permit
- Meat Board Export Permit
- Customs Documentation
- Invoice and Delivery Documentation
- Food Safety Management Certificate

Current and Potential Production and Delivery Capacity

The production of game meat from commercially viable species has been practiced in Namibia for decades. Wildlife is well adapted to the harsh environments as well to climate change.

Consultations with industry experts have concluded that, due to the successive droughts of the last decade, wildlife populations are limited. The following table depicts the estimated numbers of commercially harvestable game species on free hold land for 2020.

■ Springbok	380,000
■ Gemsbok	250,000
■ Kudu	200,000
■ Eland	40,000
■ Blue wildebeest	35,000
■ Black wildebeest	20,000



Harvesting quotas

The allocated harvesting quotas are lower than the game population numbers for commercially harvestable game animals. The natural growth rate of an undisturbed game population depends on births and natural deaths. The growth phases of wildlife populations follow a typical sigmoidal (s-shaped) growth curve. In Namibia, with its arid to semi-arid climate, rainfall and production vary greatly.

A game meat processing facility that meets export standards should be able to process (based on industry recommendations) approximately 12,000 springbok and 2,000 big game such as gemsbok annually, to maintain a sustainable business. Reasons for capacity limitations are restrictions due to harvesting times, investments, capacity of the competent authorities, availability of harvesting teams, etc. This corresponds to 96 tons of first-class game meat from springbok (4 containers) and 118 tons of game meat from gemsbok (5 containers). These figures include the sale of trimmings. Excluding trimmings sold to the international market, this corresponds to 63.6 tons (almost 3 containers) of springbok meat and 65.2 tons of gemsbok meat (almost 3 containers).

Based on the supply chain analysis, it can be concluded that enough supply of commercially harvestable game meat is available, as well as demand. The limiting factor is the availability and capacity of game meat handling facilities.

Closwa Biltong cc in Okahandja is licensed to export Biltong beef to the EU. Game Biltong export is only possible if the raw game meat can be sourced from an EU approved game meat handling facility.



Market Trend in the EU

The demand for Namibian game meat in the EU countries, Norway and Switzerland is considerable. In Western Europe alone, the potential market for game meat is reliably estimated at more than 100,000 tons per year and is growing with the ever-increasing demand for more organic or natural products.

Consumers are increasingly concerned about the health, safety and quality of the food they eat. There is also a continuing increase in purchases labelled “free of”, i.e. free from hormones, gluten, additives, etc. An important driving force behind these trends is the increasing awareness of health and well-being.

Consumers who buy game meat usually make sure they know where the meat comes from, as it is not conventional. The demand for safe, high-quality meat is increasing and Namibia can supply such a product. This suggests that there are growing markets for the export of raw game meat and products to Europe. However, many experts warn against flooding the market with game meat and game meat products from Namibia, as this would disrupt lucrative markets and prices. Preferably, it must remain a niche product targeting a niche market.

Compared to conventional meat (beef, sheep, goat, pork and poultry), “other” meat, which includes game meat and venison, has also shown an increase in consumption in Europe since 2000. In terms of volume, in 2013 it accounted for 2.59 kg of 77.35 kg per capita per year, or 3.35%.

The import of exotic game meat has fallen sharply in the last five years. However, this is not due to lower demand, but rather to lower production volumes and compliance with export standards.

Nutrition and Health Data

Consumers are becoming more and more aware of what they eat and the health benefits of food. Meat is generally associated with cardiovascular disease and obesity, but it is not so much the amount of fat consumed as the fatty acid composition that is important when considering health aspects.

Studies have shown that game meat has a favorable fatty acid composition: it has a lower proportion of inflammatory omega-6 fatty acids and more of the good fatty acids, e.g. anti-inflammatory omega-3 fatty acids.

In addition, the fat content of game meat is significantly lower than that of meat from domesticated animal species. The fat content varies between 1.32% and 3.46%. In contrast, beef contains an average of 14.2% fat.

Game meat is an important source of protein for humans. The protein content is around 24% and the moisture content is around 72%. Beef has a protein content of 19.2%. Game meat also requires less cooking time than other red meats.

Game meat can be considered as healthy meat, because it:

- has a low energy and cholesterol profile,
- contains many minerals and
- has a higher protein content compared to meat from domesticated animals.

It is often assumed that meat from younger animals is more tender and of better quality than that from older animals of the same breed. This perception is contradicted by authors with regards to game meat. Gender and age do not play such a large role in the tenderness of the meat; it is rather the nutrition and activities of the animals – and this is the decisive unique selling point for Namibian game meat: Namibian game is free-range, and grazing contributes to the nutritional and sensory quality of the meat. This is one of the reasons why Namibian game meat and meat products tend to be superior in taste and appearance.



Investment Opportunities for European Companies

It can be concluded that the Namibian game meat industry has the potential to be a fast-growing export industry.

Namibia, with its favorable agro-ecological conditions, peaceful and politically stable environment, longstanding game harvesting traditions and regulations, established institutions, sound quality management and sustainability standards, as well as export infrastructure offers viable options for investors.

At the same time, this condition as well as ideas of sustainable business development and sourcing could also make an investment in Namibia a good and profitable opportunity. Hence, the Namibian game sector is ready for further development. A joint venture with a Namibian company could boost marketing and development on both sides.

Some opportunities available are:

- New game meat processing facilities
- New game meat export facilities
- Game Biltong export facilities
- Appropriate food safety management/HACCP systems for game meat handling companies that want to export, but do not have the necessary expertise
- Contracts with overseas markets
- Support in raising awareness of Namibian game meat in the EU
- Development of suitable marketing material for game meat, Biltong and processed game meat products for the EU and Namibia
- Introduction of fresh, uncooked meat products into the EU, expanding the range of game meat products



Quellen und nützliche Links:

- Namibia National Farmers Union (NNFU)
<http://nnfu.org.na/>
- Namibia Agricultural Union (NAU)
www.agrinamibia.com.na/
- Namibia Professional Hunting Association (NAPHA)
www.napha-namibia.com
- Meat Board of Namibia
www.nammic.com.na/
- Ministry of Agriculture, Water and Land Reform (MAWLR)
www.mawf.gov.na/web/mawf/veterinary-services
- Ministry of Environment, Forestry and Tourism (MEFT)
www.met.gov.na
- Ministry of Industrialisation and Trade (MIT)
www.mti.gov.na/services.html



YOUR PARTNER FOR DEVELOPMENT COOPERATION

Economic growth creates jobs, improves people's incomes, and promotes innovation. That is why the United Nations 2030 Agenda provides for the active involvement of the private sector in the implementation of the Sustainable Development Goals (SDGs). The Global Business Network (GBN) Programme encourages local and German companies to get involved in sustainable economic development in selected countries in Africa and Asia. Via Business & Cooperation Desks the GBN-Coordination provide information, advice and guidance for businesses on existing support, financing and cooperation instruments of German development cooperation. The GBN-Coordination work closely with the German Chamber of Commerce Abroad (AHK) regional offices. The GBN is funded by the German Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

www.bmz.de/gbn



NEW MARKETS – NEW OPPORTUNITIES: NAMIBIA

In order to support the sustainable engagement of German companies in emerging and developing countries, Germany Trade & Invest (GTAI), Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and the German Chambers of Commerce Abroad (AHKs) as well as other partners combined their expertise in the publication series “New Markets – New Opportunities”.

The booklet shows companies the economic potential of future markets as well as the funding and consulting opportunities offered by the German development cooperation. “New Markets – New Opportunities: A Guide for German Companies” is supported by the Federal Ministry for Economic Cooperation and Development (BMZ). All issues are published on the websites of GTAI and GIZ. You can find selected issues, for example on Namibia also at

www.bmz.de/ez-scouts



Published by:



In cooperation with:



Published by

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Registered offices
Bonn and Eschborn, Germany

Dag-Hammarskjöld-Weg 1–5
65760 Eschborn, Germany
T +49 6196 79-0
F +49 6196 79-1115
info@giz.de
www.giz.de

Project

Global Business Network (GBN) Programme

Responsible

Linda Schraml
linda.schraml@giz.de

Layout

www.w4gestaltung.de

Photo credits

© iStock / slavemotion (p. 3), GIZ / Christina Pfandl (p. 5)

As at

Eschborn, December 2020

URL-links

Responsibility for the content of external websites linked in this publication always lies with their respective publishers. GIZ expressly dissociates itself from such content.

GIZ is responsible for the content of this publication.

On behalf of

German Federal Ministry for Economic Cooperation and Development (BMZ)

Division

Division 110
Cooperation with the private sector, sustainable economic policy
Berlin



Federal Ministry
for Economic Cooperation
and Development