



Government of Botswana



European Union

## **PRIVATE SECTOR DEVELOPMENT PROGRAMME BOTSWANA**

**A Government of Botswana initiative supported by the European Union and the Centre for the Development of Enterprise**

# ***Public Private Dialogue Technical Report***

***12 December 2014***

***Final report***





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## Abbreviations and Synonyms

BIDPA	Botswana Institute for Development or Policy Analysis
BMC	Botswana Meat Commission
BOBS	Botswana Bureau of Standards
BOCCIM	Botswana Confederation of Commerce, Industry and Manpower
BVI	Botswana Vaccine Institute
CDE	Center for Developmet of Enterprise
CEDA	Citizen Entrepreneurial Development Agency
DABP	Department of Agri-Business Promotion
DVS	Department of Veterinary Services
EFTA	European Free Trade Association
EU	European Union
FMD	Foot and Mouth Disease
GoB	Government of Botswana
GPS	Global Protein Solutions
ICSA	Irish Cattle and Sheep farmers Association
ICT	Information and Communications Technology
ITC	International Trade Center
JBS S.A	Jose Batista Sobrinho
LIT	Livestock Identification and Traceability System
MoA	Ministry of Agriculture
MTI	Ministry of Trade and Industry
NDB	National Development Bank
PPD	Public Private Dialogue
PSDP	Private Sector Development Programme
SACAU	South African Confederation of Agricultural Unions
SADC	Southern African Development Community
SMI	Swaziland Meat Industries
SMMEs	Small Micro and Medium Enterprises

## 1. Introduction:

The Public Private Dialogues workshop was organised by the Centre for Development of Enterprise as a follow up to the report written by the International Trade Centre (ITC) on the value chain analysis for the beef sector. It took place at the Fairground exposition centre during the annual Global Expo. The purpose of the workshop was to invite all the sector's stakeholders to an open discussion about the future of the beef sector, which has been highlighted by the Government of Botswana (GoB) as a strategic for the future of the country. The audience listened to a total of 15 international delegates sharing their best practices and learnings from countries including South Africa, Namibia, Zambia, Zimbabwe, Kenya, Italy, UK, Ireland. During the second day, Botswana Meat Commission (BMC) kindly organised a visit to a local feedlot and a site visit to BMC's main abattoir in Lobatse. The PPD was organised in five thematic sessions, excluding the visit to the feedlot and BMC. Those sessions included:

1. Beef export market trends and Botswana performance
2. Restructuring the beef value chain for competitiveness
3. Market intelligence information system: A key tool for marketing
4. Best practices on farming and beef processing: African experiences
5. Best practices on farming and beef processing: European experiences

A thorough summary of the presentations and Q&A sessions is included below in this technical report.

## 2. Summary:

All participants agreed that significant interventions are required to bring Botswana's beef sector at competitive advantage in the global beef export markets.

- Further research is required to evaluate the need to liberalise the market and the lessons learned from other countries should be considered (e.g. Namibia, Kenya, Zambia).
- In order for Botswana to be more competitive the communal farmers should be capacitated and become more entrepreneurial to improve productivity.
- The GoB alongside neighbouring countries should commonly look for alternative markets to trade beef meat originating from the Foot and Mouth Disease (FMD) regions. Scientific research should be considered in the decision-making.
- With the right actions put in place, Botswana beef sector could increase its productivity by over 100 million BWP currently lost due to poor implementation of Livestock Identification and Traceability System (LITS) and measles.
- The beef sector stakeholders should improve the value of the existing cattle before proceeding with increasing productivity and the cattle population.
- Market intelligence for the farmers could be significantly improved by using off-the-shelf software available in other countries e.g. South Africa.
- Botswana should apply the lessons learned in other countries and use them to develop a unique branded product that offers best value for the farmers.

### 3. Session 1: Beef export market trends and Botswana performance

**Chairperson:** Ms. Lorato Morapedi, Chief Executive, National Development Bank (NDB)

**Panelists:**

- Mr. Subhrendu Chatterji, ITC Consultant, Co-author of PSDP – ITC beef value chain report
- Dr. Agapitos Hatzipetros, ITC Consultant, Co-author of PSDP – ITC beef value chain report
- Dr. Stephen Ghanie, Contributor of PSDP – ITC beef value chain report
- Dr. Christopher Tsopito, Contributor of PSDP – ITC beef value chain report

#### 3.1. Presentation:

During the first session of the Public Private Dialogue chaired by Ms Lorato Morapedi, the outcomes of the CDE-PSDP-ITC value chain report were presented to the delegates. The presenters summarized the macroeconomic data of the beef world, reviewed the market share of Botswana in the global marketplace and demonstrated the social impact of the beef sector to the country's population. Amongst the ITC's findings was that over 88% of the cattle population are owned by communal farmers of all sizes, 50% of the cattle holdings include up to 50 heads and that the overall comparison between the industrial farms vs. those operating at a traditional way is in favour of the former. During their analysis, the team used ITC's "four gear methodology" that identifies export competitive constraints.

Those include: a) supply side constraints within the country, b) weaknesses of the business environment, c) challenges to enter export markets and d) social, environmental and regional development constraints.

The CDE-PSDP-ITC consultants Mr Subhrendu Chatterji and Dr Agapitos Hatzipetros then outlined seven strategic interventions alongside a detailed action plan for every single of them. The proposed roadmap includes the following strategic objectives:

1. Strengthen the performance of communal livestock farming
2. Improve the effectiveness of DVS and its services to the sector
3. Develop a more useful support network for the sector's value chain
4. Intensify efforts to find multiple solutions for cattle from FMD-infected areas
5. Further restructure BMC and lift its export monopoly
6. Develop export capacity, enhance Botswana beef's market positioning and diversify exports
7. Improve regional cooperation on issues affecting the countries' livestock sectors

The proposed interventions that could be covered by PSDP are drawing on various strategies and studies and discussions with sector stakeholders. They form part of a greater roadmap aimed at strengthening the entire beef value chain. They are all interlinked and they seek to address key issues of the beef sector.

The criteria applied included amongst others: a) achievability, b) private sector development c) ownership d) clustering e) exports oriented f) linkages with other projects.

The PSDP proposed interventions are:

1. Strengthening communal livestock production for exports
2. Partnering with DVS to further strengthen & refine the delivery of extension services to the beef sector
  - a. DVS strategy and organization
  - b. Strengthening disease management
  - c. LITS
  - d. Food safety inspection
  - e. LACs
  - f. BNVL
  - g. Privatisation/outsourcing strategy
3. Building export capacity at BMC and developing a Botswana beef brand
4. Beef producers associations

### **3.2. Q&A Session:**

The points raised during the Q&A session included the subsidies provided by BMC to the “red-zone” farmers, the lack of infrastructure at Ngamiland and the importance of independence for DVS to deliver their mandate. Furthermore, the audience discussed the importance of appropriate use of land, fencing for all types of farming and the importance of strengthening communal farming.

## **4. Session 2: Restructuring the beef value chain for competitiveness**

**Chairperson:** Mrs. Mmadima Nyathi, Director of Agri-Hub, Ministry Of Agriculture (MoA)

**Panelists:**

- Mr. Boweditse Masilo, Director, Department of Agri-Business Promotion (DABP)
- Dr. Letlhogile Modisa, Director, Department of Veterinary Services (DVS)
- Dr. Akolang Tombale, CEO, Botswana Meat Commission (BMC)
- Dr. George Matlho, CEO, Botswana Vaccine Institute (BVI)
- Dr. Fanikiso, Chairman, BOCCIM Agricultural Sector
- Mr. Jaco De Villers, Chief Executive Officer, Quality Meat
- Dr. T. Kgosietsile Phillemon-Motsu, Director, Department of Animal Production (MoA)
- Dr. K.P Sehularo, Individual Farmer

#### **4.1. Presentations:**

The second session of the workshop concentrated in the potential of restructuring the beef sector. Presentations from the Department of Veterinary Services (DVS), BMC and Botswana Vaccine Institute (BVI) were shared. The rest of the panellists contributed with a personal speech.

The presentations by DVS pointed out that although overstretched, the department's management and staff are committed to improve the extension services provided to the sector. It was mentioned that DVS acknowledges the need to change the business model and therefore have already taken some steps towards that direction by reducing the amount of responsibilities, upgrading the country's traceability system.

BMC was represented by Dr Akolang Tombale, CEO. Dr Tombale reviewed the challenges that BMC has been facing in the recent past mainly due to the export ban. In addition Dr Tombale mentioned to the audience that BMC has a combined lost income of 100 million BWP due to the pertinence of measles and the inadequate implementation of cattle traceability system. Finally Dr Tombale mentioned that due to the recent partnership with Global Protein Solutions (GPS), BMC has managed to turn around the trend and demonstrate a healthy profit of 27 million BWP in 2013 compared to the multi million losses in 2012.

BVI from with the help of Dr George Mathlo shared their recent technological advances on vaccine development. Dr Mathlo explained how the partnership with Merial, a French pharmaceutical company has benefited BVI to build a unique know-how in the field of vaccine technology whilst remaining commercially successful. In addition to BVI's solid manufacturing capability it possesses unique reference laboratory facilities that has been designed to the most advanced specifications.

#### **4.2. Q&A Session:**

During the Q&A session the above presentations were discussed. One suggestion presented by Mr John Kampf, farmer from Ghanzi was that farmers with more than fifty cattle should register for VAT. This will automatically offer them a 12% discount on the inputs and other services required. The aim of this suggestion was to encourage farmers to become more entrepreneurial. Following the above question, the audience discussed the lack of infrastructure for integrated farming, mainly fences and boreholes and that the ideal size for a farm combining cattle and crops should be 8ha. Dr Aganga from MITI stressed out the importance of eradicating measles and the fact that it is possible through appropriate measures. Last but not least Dr Mathlo answered a question from the audience regarding BVI's capacity to run residue tests. He kindly answered that the laboratory although has the right capacity and equipment, however it is not certified for this type of tests. Participants also commented on the need for DVS to outsource certain non-core activities to specialised SMMEs

### **5. Session 3: Market intelligence information system: A key tool for marketing**

**Chairperson:** Ms. Maria Machailo Ellis, CEO, Botswana Confederation of Commerce Industry and Manpower (BOCCIM)



**Panelists:**

- Professor Patrick Malope, Senior research, Botswana Institute for Development of Policy Analysis (BIDPA)
- Mr. Brian Perkins, Managing Director, Global Protein Solutions (GPS), United Kingdom
- Mr. Jantus van der Linden, Director, AgriSuite Online
- Dr. Geoffrey G. Seleka, Executive Director of ICT and Marketing, Botswana Innovation Hub (BIH)
- Mr. Nixon Marumoloa, Regional manager, Citizen Entrepreneurial Development Agency (CEDA)
- Mr. Felix Lupindula, Head of corporate and public affairs, Zambeef, Zambia
- Ms. Mhalanga Nombulelo, Cattle procurement manager, Swaziland Meat Industries (SMI)

## **5.1. Presentations:**

First to present was Mr Brian Perkins Chairman and Managing Director of GPS. The first part of his presentation focused on the global beef market trends the challenges. He then proceeded presenting the results of the partnership between GPS and Namibia's MeatCo that resulted in a comparative price advantage of approximately 15-20% when compared to Botswana's prices. Finally Mr Perkins outlines the results of the partnership between GPS and BMC, stressing the increase in volumes and prices achieved over the last couple of years and the healthy profit achieved by BMC during the last fiscal year as a proof of a worthy partnership.

Mr Jantus van der Linden, from Agrisuite was the next to take the podium. He presented the Agrisuite Online software that is an internet-based software developed for farmers (both horticulture and livestock) that provides a broad range of information related to production techniques, weather and rainfall forecasts, live market prices, management practices, health care and marketing. He informed the audience that whilst this tool has been developed for the South African market, it is highly adaptable to any country. He also noted that one of the advantages of the system is that it offers live information to farmers and it is accessible by PC, laptop, tablets as well as smartphones.

The next presentation was by Mr Felix Lupindula, Head Corporate and Public Affairs, Zambeef from Zambia. He started his presentation by summarising the Zambeef operations in Zambia and the new expansions to Nigeria and Ghana. He then listed the challenges currently faced by the beef sector from Zambeef's perspective and he finally summed up the steps taken by Zambeef to improve efficiencies whilst expanding operations.

Swaziland Meat Industries (SMI) was represented by Ms Nombulelo Mhlanga, Senior Trade Advisor. In her presentation she demonstrated to the audience SMI's export market by destination and customer base. She then continued by explaining to the audience on the origins of SMI and briefly explain Simunye's brand development history. Lastly she explained the methodology used by SMI to export Simunye beef.

Following the presentations from the international delegates, Professor Patrick Malope from BIDPA pointed out that Botswana should primarily focus on understanding the customer and market base before any intervention. He then stressed the importance of increasing the quality of BMC's inputs before proceeding with increasing production levels.

Mr Marumoloa from CEDA presented a brief introduction of the parastatal's activities, mentioning that the sector is dominated by absentee farmer, whilst the output is of low

quality that results in low off-take. The three challenges of the beef sector are the lack of market orientation, inadequate management systems and suboptimal production systems.

## **5.2. Q&A Session:**

During the Q&A session the audience appealed for more scientific approach to understand the climate changes and use the results of the research to train the farmers on the ground. It was asked that social media and modern technology such as smartphones should be used by farmers to be kept up to date with the latest technological advances as well as market intelligence (input prices, BMC prices, etc)

Dr Ghanie from BMC mentioned that in Zambia farmers benefited by an EU-funded project that developed market intelligence for farmers.

In Swaziland, the market intelligence is held and disseminated by SMI. The audience then heard that the Agrisuite online software is easily accessible by all farmers on smartphones, tablets and PCs. BOCCIM from their part advocates for market regulation on pro-business base.

## **6. Session 4: Best practices on farming and beef processing: African experiences**

**Chairperson:** Ms. Masego Marobela, Managing Director, Botswana Bureau of Standards (BOBS)

### **Panelists:**

- Mr. Solomon Zawe, Chairman, Zimbabwe Livestock Identification Trust (LIT)
- Mr. James Gathara, Chairman, Kenya Meatons Ltd
- Dr. Mary Louise Penrith, Steering committee member, Southern African Confederation of Agricultural Unions (SACAU)
- Mr. Apendego Rotich, Representative, Kenya Meat Commission
- Mr. Leonard Morakaladi, Member, Botswana Beef Producers Union

## **6.1. Presentations:**

First to present was Mr Gathara from Kenya Meatons Ltd. After summarising the Kenyan beef sector he analysed the beef market liberalisation as it happened in Kenya. The market de-regulation initiated already in 1980s but it was not fully liberalised before the early 2000s. It was this time that the Kenya Meat Commission closed down, only to re-open in 2005 as an independent entity to compete with the private sector. Similarly to Botswana, the large majority of the cattle are owned by pastoral farmers (70%).

Mr Apendego Rotich, a representative from Kenya Meat Commission was next to present. He talked through the process of market de-regulation that took place in Kenya from the 1980s. He pointed to the fact that the process was not smooth and due to the lack of planning some important elements were unattended. Mr Rotich informed the audience of the Government of Kenya's decision to boost efforts in order to regain access to export markets.

Next to present was Ms Rejoice Karita from Namibia's Beef Forum. After summing up Namibia beef sector's macroeconomics she analysed the structure of the country's Meat Board, focusing on the responsibilities as the main marketing and import/export entity of meat. She then

guided the audience through the quality assurance system established in Namibia. Finally she reviewed the role of the government and the impact the market de-regulation had on the farmers in Namibia.

Mr Salomon Zawe, chairman of Zimbabwe's Livestock & Meat Advisory Council presented in detail the challenges faced by the Council to implement the Livestock Identification and Traceability System. Despite the early pick up of the technology in the early 2000s, the use of the system has been limited at the farm level more recently, driven mainly by the lack of possibility to access the exports markets.

Dr Mary Louise Penrith a veterinarian from SACAU summarised the impact of animal diseases on the beef value chain in the SADC region. She noted that it is impossible to eradicate Foot & Mouth disease in SADC due to the co-existence of humans, cattle and wildlife in Ngamiland. The local buffaloes are the disease's reservoir and the virus type found in SADC are most challenging and variable than those found in other regions of the world. Dr Penrith listed a number of alternatives to the disease eradication paying a particular attention to the value chain approach one.

## **6.2. Q&A Session:**

During the Q&A session the audience discussed that the inability to trace back the cattle, costs the nation millions of pula annually. The chairman of the beef union called for a close collaboration with the neighbouring countries. Following Dr Penrith's presentation, the audience enquired about the possibility to re-apply the Zambezi project that was recently completed in Namibia to the Chobe region in Botswana. When firstly introduced, the Zambezi project was seen by DVS and beef producers in Namibia as a thread instead of a tool to help them. It was further discussed that SADC should take the lead to find a viable solution to the farmers of the cattle that reside in regions characterised with FMD.

Regarding the presentations that focused on the market liberalisation in Kenya, the audience discussed that the right lessons should be taken from that country and make sure that if and when the BMC Act is modified, those are not replicated in Botswana.

## **7. Session 5: Best practices on farming and beef processing: European experiences**

**Chairperson:** Dr. Akolang Tombale, CEO, Botswana Meat Commission (BMC)

### **Panelists:**

- Mr. Pdraig McCarthy, European Livestock and Meat Trading Union, Belgium
- Mr. Patrick Kent, President, Irish Sheep and Beef farmers Association (ICSA), Ireland
- Dr. Alessandro Mazzenga, Manager of traceability and quality specifications, Unicarve Association, Italy
- Dr. Alessandro Sadocco, Veterinarian, Unicarve, Italy
- Mr. Gianluca Mattioli, Inalca Group, Italy

## **7.1. Presentations:**

Mr Patrick Kent, President of Ireland's Sheep and Beef Farmers Association was the first to present the activities and organisational structure of the association. Mr Kent told the audience how strong Ireland's farming exports, particularly noting that the country produces 6 times the amount of meat it produces. He later on explain the associations lobbying activities to protect the members' interests. Finally, the audience heard about the support that the ICSA provides to its members in terms of training and other benefits.

Dr Alessandro Mazzenga, representing Unicarve, one of Italy's largest beef producers associations focused his presentation on the importance of traceability and how Unicarve uses this requirement to include the necessary information on a label attached to the meat sold to consumers. He made the distinctions between the obligatory and voluntary information included in the labels.

Following Dr Mazzenga's presentation, it was the turn for another Italian to present. This time was Dr Alessandro Sadocco, a freelancer veterinarian working with Unicarve. Dr Sadocco outlined the critical phases of the intensive beef cattle rearing, before going through the vaccination program for Italian beef. He then moved to the next section of his presentation where he talked about bovine infectious diseases, such as parainfluenza, bovine viral diarrhea amongst others.

Mr Padraig McCarthy, representative of Europe's Livestock and Meat Traders Union presented the European Union market's trends in terms of exports and imports. Mr McCarthy pointed to the audience that the EU market will consume more than it will produce in the future; therefore there will be a need for beef imports from third countries. EU exports suffer greatly due to the sanctions imposed to the EU by Russia; the Union's largest export market. The audience heard that the bovine prices at EU will slightly rise in the near future before stabilising over the next ten years.

## **7.2. Q&A Session:**

The audience had an virant discussion following the presentation by the European delegates. Mr Kent urged Botswana to make the best of the other countries experiences and develop a unique product for exports. It was further discussed that farmers in Botswana should take their work more seriously in terms of productivity. A member of the audience raised his concerns regarding cattle theft. Mr Kent kindly suggested that the use of a microchip, similar to those used by domestic pets could be used. Farmers attending the workshop called for more market intelligence information to become available to them. Lastly, it was mentioned that a body such as the Meat Board established in Namibia could be implemented in Botswana.

## 8. Annex 1: Programme



Government of Botswana



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**PRIVATE SECTOR DEVELOPMENT PROGRAMME (PSDP)**  
Public-Private Dialogue meeting on beef value chain development  
Global Expo 2014, Annex Hall, Fairground Holdings- 17-19 November 2014, Gaborone  
**Agenda**

**17 November 2014 - Plenary Session**

Scheduled Time	Agenda Items
07:30 - 08:00	Arrival of Guests
08:00 - 08:10	Master of Ceremonies - Mr. Norman Moleele, Botswana Confederation of Commerce Industry and Manpower (BOCCIM)
08:10 - 08:20	Welcome remarks
08:20 - 08:30	<ul style="list-style-type: none"> <li>Dr. Micus Chimbombi - Permanent Secretary, Ministry of Agriculture (MoA)</li> </ul>
08:40 - 08:50	<ul style="list-style-type: none"> <li>Ambassador Alexander Baum - Head, EU Delegation to Botswana and SADC</li> </ul>
08:50 - 09:00	<ul style="list-style-type: none"> <li>Mr. Gideon Mmolawa, Chief Commercial Officer, Ministry of Trade and Industry (MTI)</li> <li>Mr. Sid Boubekur - Head, CDE Regional Office for Southern Africa</li> </ul>
09:00 - 09:30	<b>Session 1: Beef export market trends and Botswana performance</b> Chairperson: Ms. Lorato Morapedi, Chief Executive, National Development Bank (NDB) Panelists: <ul style="list-style-type: none"> <li>Mr. Subhrendu Chatterji, ITC Consultant, Co-author of PSDP – ITC beef value chain report</li> <li>Dr. Agapitos Matsipetros, ITC Consultant, Co-author of PSDP – ITC beef value chain report</li> <li>Dr. Stephen Ghanie, Contributor of PSDP – ITC beef value chain report</li> <li>Dr. Christopher Tsopito, Contributor of PSDP – ITC beef value chain report</li> </ul>
09:30 - 10:00	Discussion
10:00 - 10:30	Morning Tea
10:30 - 11:15	<b>Session 2: Restructuring the beef value chain for competitiveness</b> Chairperson: Mrs. Mmedima Nyathi, Director of Agri-Hub, Ministry Of Agriculture (MoA) Panelists: <ul style="list-style-type: none"> <li>Mr. Boweditswe Masilo, Director, Department of Agri-Business Promotion (DABP)</li> <li>Dr. Letlhogile Modisa, Director, Department of Veterinary Services (DVS)</li> <li>Dr. Akolang Tombale, CEO, Botswana Meat Commission (BMC)</li> <li>Dr. George Matho, CEO, Botswana Vaccine Institute (BVI)</li> <li>Dr. Fanikiso, Chairman, BOCCIM Agricultural Sector</li> <li>Mr. Jaco de Villiers, Chief Executive Officer, Quality Meat</li> <li>Dr. Kgotsilele Philemon-Motsu, Director, Department of Animal Production (MoA)</li> <li>Dr. K.P. Sehulano, Individual Farmer</li> </ul>
11:15 - 12:00	Discussion
12:00 - 14:00	Lunch
14:00 - 15:00	<b>Session 3: Market intelligence information system: A key tool for marketing</b> Chairperson: Ms. Maria Machello Ellis, CEO, Botswana Confederation of Commerce Industry and Manpower (BOCCIM) Panelists: <ul style="list-style-type: none"> <li>Professor Patrick Malope, Senior research, Botswana Institute for Development of Policy Analysis (BIDPA)</li> <li>Mr. Brian Perkins, Managing Director, Global Protein Solutions (GPS), United Kingdom</li> <li>Mr. Jantus van der Linden, Director, AgriSuite Online</li> <li>Dr. Geoffrey G. Seleka, Executive Director of ICT and Marketing, Botswana Innovation Hub (BIH)</li> <li>Mr. Nixon Marumolao, Regional Manager, Citizen Entrepreneurial Development Agency (CEDA)</li> <li>Mr. Felix Lupindula, Head of Corporate and Public Affairs, Zambeef, Zambia</li> <li>Ms. Mhlana Nombulelo, Cattle Procurement Manager, Swaziland Meat Industries (SMI)</li> </ul>
15:00 - 15:30	Discussion

#### 18 November 2014 – Site Visits

Scheduled Time	Agenda Items
08:00 - 12:00	<b>Site visit for international delegates</b> <ul style="list-style-type: none"> <li>Mmamashla Feed Lot company, Gaborone</li> <li>BMC, Lobetse</li> </ul>

#### 19 November 2014 – Plenary Sessions

Scheduled Time	Agenda Items
08:00 - 09:45	<b>Session 4: Best practices on farming and beef processing: African experiences</b>  Chairperson: Ms. Masego Marobela, Managing Director, Botswana Bureau of Standards (BOBS)  Panelists: <ul style="list-style-type: none"> <li>Mr. Solomon Zawe, Chairman, Zimbabwe Livestock Identification Trust (LIT)</li> <li>Mr. James Gathara, Chairman, Kenya Meatworks Ltd</li> <li>Dr. Mary Louise Penrith, Steering Committee Member, Southern African Confederation of Agricultural Unions (SACAU)</li> <li>Mr. Apendego Rotich, Representative, Kenya Meat Commission</li> <li>Mr. Leonard Morakaledi, Member, Botswana National Beef Producers Union</li> </ul>
09:45 - 10:00	Discussion
10:00 - 10:30	Morning tea
10:30 - 11:30	<b>Session 5: Best practices on farming and beef processing: European experiences</b>  Chairperson: Dr. Akolang Tombale, CEO, Botswana Meat Commission (BMC)  Panelists: <ul style="list-style-type: none"> <li>Mr. Padraig McCarthy, European Livestock and Meat Trading Union, Belgium</li> <li>Mr. Patrick Kent, President, Irish Sheep and Beef farmers Association (ICSA), Ireland</li> <li>Dr. Alessandro Mazzenga, Manager of traceability and quality specifications, Unicarve Association, Italy</li> <li>Dr. Alessandro Sadocco, Veterinarian, Unicarve, Italy</li> <li>Mr. Gianluca Mattioli, Inalca Group, Italy</li> </ul>
11:30 - 12:00	<b>Way Forward</b> Mr. Edmond Moabi, Coordinator, Agricultural Hub
12:00 - 12:30	<b>Closing Remarks</b> Mr. Sid Boubekeur, Head, CDE Regional Office for Southern Africa
12:30 - 14:00	Lunch
14:00 - 16:00	Business to Business Meetings

A Government of Botswana initiative supported by the Ministry of Trade and Industry, the European Union, the Centre for the Development of Enterprise and the Botswana Confederation of Commerce Industry and Manpower (BOCCIM)



## 9. Annex 2: List of Participants



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### PRIVATE SECTOR DEVELOPMENT PROGRAMME (PSDP), BOTSWANA

A Government of Botswana initiative supported by the European Union and the Centre for the Development of Enterprise  
**Public-Private Dialogue meeting on beef value chain development**  
**Global Expo 2014, Annex Hall- fairground Holdings, 17-19 November 2014**  
**Gaborone**

#### Participants and their Contacts 17 and 19 November, 2014

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## **10. Annex 3: Speeches**



**Government of Botswana**

**WELCOME SPEECH BY DR. MICUS C. CHIMBOMBI, PERMANENT SECRETARY, MINISTRY OF AGRICULTURE, AT THE OFFICIAL OPENING OF THE PUBLIC-PRIVATE DIALOGUE WORKSHOP ON BEEF VALUE CHAIN DEVELOPMENT, GLOBAL EXPO 2014, 17 – 19 NOVEMBER, 2014, GABORONE, BOTSWANA**

**Director of Ceremonies**

**Permanent Secretary, Ministry of Trade and Industry**

**Agricultural Hub Coordinator**

**Honourable Head, European Delegation for Botswana and SADC**

**Deputy Permanent Secretaries**

**Heads of Parastatals**

**Heads of Departments**

**Invited guests from the EU, Kenya and SADC**

**Chairperson, Botswana National Beef Producers Union**

**Delegates of the various Producers/Farmers**

**Members of the Private Sector**

**Ladies and Gentlemen**

**Director of Ceremonies**

Allow me to welcome you all to this very important Public-Private Dialogue workshop on the beef value chain development conducted within the 2014 Global Expo week. I must say, the value chain approach is one of the initiatives that the Ministry of Agriculture has adopted to drive commercialisation and diversification of the agricultural sector in Botswana. In this regard, in May 2011, my Ministry launched the Botswana Agrifood Value Chain Project with the aim of facilitating the diversification and commercialisation of the agro-industry sector to create jobs and improve incomes for all value chain actors. This project was conceived on the realisation for the need for a thorough assessment of the main agricultural sub-sectors in order to guide policies and programmes that promote competitiveness taking into account economic, social and environmental issues. We have, therefore, identified a number of subsectors for which we will map the value chain. The process has started with mapping the beef value chain, a study which was completed and published in 2013. The project was undertaken by my Ministry with technical and financial assistance from the Food and agriculture Organisation of the United Nations.

The beef sub-sector was prioritised in this project for a number of reasons, but most importantly because of the role it plays in the lives of Botswana more especially those in the rural areas. In spite of its importance, the study has revealed the existence of some critical gaps along the value chain that have prevented the

attainment of the sector's full potential. (The report is available in the Ministry website as well as the Ministry social media such as Facebook and twitter). The related study, which is going to be the focus of discussion for the next 3 days has built on the beef value chain study we did in 2013, coming up with a comprehensive Action Plan for supporting the local beef industry and developing it to meet regional and international market requirements. This study, as the colleague, from the Ministry of Trade and Industry has already indicated, is a latest development in the beef sector analysis and has just been completed this year, by the Centre for the Development of Enterprise (CDE) of the European Union (EU) in partnership with the International Trade Centre (ITC) of the United Nations under the framework of the Private Sector Development Programme (PSDP).

## **Director of Ceremonies**

While challenges that our beef industry faces are numerous as I believe will be revealed during presentations later on, there are a few that I think I need to highlight upfront. I must say one of the main challenges that our beef industry has in the recent past undeniably faced was the inefficiencies of the Livestock traceability system that we were using, the reticular bolus. Issues with the system ranged from animals that would have more than one bolus to those where the bolus could not be detected by the bolus reader. Farmers were at times prevented from selling their cattle due to identification issues. This not only inconvenienced the sellers, but also exacerbated the already serious problem of under supply of cattle to processing facilities, thereby undermining the profitability of the sub-sector as a whole.

## **Director of Ceremonies**

I wish to also underscore the low uptake of existing genetics of indigenous cattle. As a country, we have our own breeds of animals that have been developed taking into account our own climatic conditions and our natural resource base. One such is the Musi breed which we launched in 2010. The utilisation of these resources remains low and I wish to implore my fellow farmers, as I am one, to seriously consider these resources. The other issue that we cannot afford to ignore is that of poor rangeland management. With our current communal grazing system stocking are difficult to control, resulting in overgrazing. Lastly, the other challenge which challenge which our agriculture faces, and which requires concerted effort is the issue of climate change. This calls for an urgent need for strategies that will counter the negative effects of the developments such as low rainfall, changes in seasons, increased temperatures and many more.

## **Director of Ceremonies**

I have been informed that this Public-Private sector Dialogue workshop is going to present findings emanating from the recently completed CDE-PSDP-ICT study on the beef value chain. The main focus will be on the proposed interventions and the action plan, which I call upon all of you interrogate to ensure that what comes out is a practical and actionable product that will yield a dynamic and competitive beef industry.

## **Director of Ceremonies**

This initiative is a commendable effort to which I want to guarantee the full support of my Ministry as the lead implementing agency for agricultural projects and programmes. Because of the important role that the cattle industry plays in our country, we always make it a point that we take advantage of any initiative geared towards supporting this sub-sector. I want to also encourage our investment arm in the Ministry of Agriculture, the Agricultural Hub to be alert for opportunities therefrom the presentations which offer potential for investment.

With those remarks, I once again welcome you all to this Public Private Sector Dialogue and **WISH you FRUITFUL DELIBERATIONS.**

**PULA!!! PULA!!! PULA!!!**





Government of Botswana

**SPEAKING NOTES FOR THE PERMANENT SECRETARY (MTI) -  
PUBLIC-PRIVATE DIALOGUE MEETING, 17-19 NOVEMBER 2014**

- Head of EU Delegation for Botswana and SADC, Ambassador Alexander Baum;  
Permanent Secretary, Ministry of Agriculture, Dr. Micus Chimbombi;  
Head of CDE Regional Office for Southern Africa, Mr. Sid Boubekour;  
Chief Executive Officers;  
Ambassadors here present;  
International Organisations that made time to come to Botswana;  
Champions of Industry; all protocol observed,  
Ladies and Gentlemen;  
Good Morning;
  
- It is my honour to welcome you all to this very important meeting that will discuss the Botswana's beef value chain which we all know that it is important for Botswana's rural population and it is an important source of export earnings;



- That is why as a Ministry responsible for diversifying the economy of Botswana, we saw it necessary to have beef as one of the strategic sector to be promoted to support the country's Economic Diversification Drive (EDD);
- In promoting the beef sector, the Ministry of Trade & Industry through the EDD recommended that a value chain analysis and development be conducted in order to give a clear picture of where we have a comparative & competitive edge such that the small and medium enterprises can tap on, and what can be done to address bottlenecks if identified;
- This value chain analysis and Development has been undertaken by CDE and the International Trade Centre (ITC) in the framework of the Private Sector Development Programme (PSDP) which the findings will be shared with us today;
- Ladies and Gentlemen, this value chain analysis and Development that we have undertaken is in line with our regional commitments at Southern African Customs Union (SACU), whereby the five Member States being Botswana, Lesotho, Namibia, Swaziland and South Africa have agreed that Beef sector is a priority in the region;
- As such Member States have agreed to develop cross border value chains where each country should identify an area where it has a comparative and competitive edge;



- Also, as you all know, the SADC-EPA negotiations have just been concluded, and the European Union has offered the SADC Member States duty free quota free market access in all the products which beef is one of them;
- Hence, this meeting is coming at the right time where as a country we need to prepare ourselves and build capacities in areas where we feel we can benefit from;
- With this remarks, I will like to welcome you all to this meeting and wish you fruitful discussions.
- I THANK YOU!



EUROPEAN UNION

DELEGATION TO THE REPUBLIC OF BOTSWANA AND SADC

## 10<sup>th</sup> European Development Fund

Public and Private Dialogue on beef value chain development

17<sup>th</sup> November 2014

Global Expo 2014

Remarks by Ambassador Alexander BAUM

Head of Delegation of the European Union

to the Republic of Botswana and SADC.

Mr. Gideon Mmolawa - Chief Commercial Officer, Ministry of Trade and Industry

Dr. Philemon Motsu - Deputy Permanent Secretary, Ministry of Agriculture

Other representatives of the Botswana Government,

Representatives of EU Member States

Representatives of the donor community

Representatives of the Beef Industry

Director of Ceremonies

Ladies and Gentlemen,

It is really a pleasure to have been invited to make some remarks at the opening of this event.

As you might be aware the EU and the SADC region have a long history of trade cooperation. Goods from the SADC region have enjoyed preferential market access to the EU, initially through the Lome Convention and recently through the Cotonou Agreement.

The recent conclusion of the negotiations on the EU-SADC Economic Partnership Agreement presents unprecedented trade opportunities for the region. The EPA will go beyond the ambitions of other trade agreements to guarantee duty-free and quota-free access to the EU market.

Director of Ceremonies, Ladies and Gentlemen,

The EU is the largest trade partner of the SADC-EPA group of states, which currently consists of Botswana, Lesotho, Mozambique, Namibia, South Africa and Swaziland. In 2013 alone the value total EU imports from the region was approximately EUR 31 billion, of which about 10% was agricultural and fishery products. Total EU exports to the region for the same period was EUR 33 billion.

I hope you will agree with me that with improvements in trading conditions facilitated by the SADC-EPA the amount of trade between our markets will increase tremendously in volume and value, for the benefit of our citizens. Let me just remind you that the SADC countries which signed EPA are guaranteed duty free and quota free access to the EU market.

The EU has been a lucrative market for Botswana beef for many years and we believe it is a market that offers the best value for Botswana cattle farmers. EU citizens adore Botswana beef and as such the EPAs open up the market for Botswana farmers. To this end the EPA presents a golden opportunity for increasing exports of Botswana beef to the EU market, provided that EPA conditions such as implementation of a livestock Identification and Traceability System are met.

Director of Ceremonies, Ladies and Gentlemen,

One of the reasons Botswana beef is so popular is that it is considered good quality naturally since most cattle graze freely in open pastures. One sees an opportunity to build on this popularity to develop a strong brand for Botswana beef. This could go a long way in facilitating higher returns for the farmer and hence develop an efficient beef value chain. To some extent this has already been achieved in neighboring Namibia.

Director of Ceremonies, Ladies and Gentlemen,

You will recall that in 2012, the European Union and the government of Botswana signed a Financing Agreement valued at EUR 8 million to support empowerment of Non-State Actors in Botswana. This support comprises of two components; one on NGO empowerment and another to support the Private Sector Development Strategy. Two years down the line some critical activities to the private sector component are now being implemented. A crucial activity under the Private Sector Development

programme is the study of value chains with a view to increase competitiveness and access to regional and international markets. The first such value chain that is targeted for development and strengthening is beef.

We have gathered here as stakeholders in the beef industry to have an open dialogue about how to make the beef value chain more efficient and beneficial to the farmer. It is recognized that most cattle in Botswana that end up in the market are kept by farmers in communal land areas. Capacity building for these farmers is therefore indispensable if Botswana is to increase exports of good quality beef into the international market.

Director of Ceremonies, Ladies and Gentlemen,

In concluding my brief remarks I would like to thank the government of Botswana for the excellent cooperation that has ensued between us over the years. The Ministry of Trade and Industry has demonstrated excellent leadership in supporting the implementation of the PSDP. I would like to commend, also, the implementing agency for the PSDP, being the Center for Development of Enterprise. The role played by BOCCIM in the monitoring and evaluation function of the PSDP is appreciated. The involvement and participation of local institutions such as BITC, LEA, BNPC, BEMA, etc., in the PSDP sector augers well for the future of private sector development.

Director of Ceremonies, Ladies and Gentlemen,

I thank you.....Ke a leboga!



Government of Botswana



European Union

## **PRIVATE SECTOR DEVELOPMENT PROGRAMME (PSDP) BOTSWANA**

### **Public and Private meeting on Beef Value Chain Development From assets to investment**

17-19 November, 2014

**Sid Boubekur**  
**Head, CDE Regional Office for Southern Africa**

Back in the 80's, I worked for one of the most famous French Universities specialized on sector approaches, value chains and cluster analysis as it was main area of research at the time.

The objective of the research was to understand the main leading actors, those that drive the sector or value chain, understand their relationships with the view to encourage Public and Private Partnership as well as identify opportunities of outsourcing activities between enterprises from the same sector.

During this period, Europe and some Asian countries such as Vietnam, Thailand, Japan and Malaysia, developed leading enterprises by encouraging solid relationships between the public and private stakeholders. In Europe and Asia numerous sectors were developed on this bases, through encouragement of linkages and outsourcing between large, state owned organizations and SMEs.

The example of the car industry is a good model of a dynamic sector, till now pushed by strong linkages between suppliers of raw materials, the



processing industry, the assembly companies, marketing, branding and distribution companies.

Following this example, I can confidently state that there is no way for a sector or a value chain to be developed and be competitive without Public Private Interactions; collaboration, partnerships or strategic alliances.

Regarding the Botswana's beef sector, I have been honored to visit a number of public and private actors, including farming associations, beef producers and distributors.

I have realized that the beef "sector", as such, is fragmented. Clearly, there is a total lack of communication and partnership between the stakeholders, resulting in the failure to develop a healthy, sustainable, competitive and profitable sector.

We understand that there is tremendous export development potential for Botswana beef; however, it will only be possible with strong, clear and concise communication and cooperation between the key stakeholders.

It is within this context that the PSDP has organized this Public Private Dialogue meeting as the first step towards upgrading the Botswana beef sector with the additional objective of encouraging collaboration opportunities amongst Botswana, Africa and European stakeholders.

The most important term in Public and Private Dialogue is dialogue, which means understanding one another, exchanging experiences, best practices and finding cooperation on the benefit and on the interest of the beef sector.

I take this opportunity to thank all the Botswana beef farm associations and producers for the interest they have expressed in this event. I would also like to warmly thank the Ministry of Agriculture, MTI, Botswana National Strategy Office, European Delegation of Botswana and SADC,

BOCCIM, BITC, BMC, the Agri-hub, DVS and BVI for the support they have provided in the preparation of this event.

Thanks also to our sponsors and partners CEDA, NDB and Standard Chartered Bank which financed the participation of Botswana, Africa and European representatives. We foresee strong collaboration with you.

Welcome to Africa and European Beef sector stakeholders who are among us today. We are convinced that we will learn a lot from your experience and that you will provide pertinent recommendations to this event for sustainable competitiveness of Botswana's Beef sector.

Thanks to our partner International Trade Center which realized together with PSDP the pertinent study on Beef Value Chain in Botswana.

Finally thanks to CDE-PSDP team which prepared very professionally this event.

I encourage you to take this opportunity to engage in robust, productive discussions in a constructive and peaceful manner.

Thank you

## 11. Annex 4: Press Releases



Governeemnt of Botswana



European Union



### Public-Private dialogue meeting Gaborone 17 – 19<sup>th</sup> NOVEMBER, 2014

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#### BOTSWANA'S BEEF VALUE CHAIN

##### FROM ASSETS TO INVESTMENT

The Private Sector Development Programme (PSDP) recently engaged the International Trade Centre (ITC) to undertake a Value Chain Analysis and Development (VCAD) on the Botswana beef sector. The objective of the VCAD was to identify bottlenecks and constraints in the sector's value chain, especially related to exports and Small, Micro and Medium-Enterprises (SMMs), and propose an Action Plan to alleviate such constraints.

Botswana's beef sector remains important for country's rural population, and it continues to be an important source of export earnings. It has been highlighted as a strategic sector to be promoted to support the country's Economic Diversification Drive (EDD). At the same time, it is hampered by structural challenges, including an export monopoly and lack of scale, which reduce its commercial potential.

##### **WHY HOLD A PUBLIC-PRIVATE DIALOGUE MEETING?**

Botswana's beef industry is complex, involving a range of actors and channels with diverse objectives and needs but dominated by traditional beef cattle production systems. However, the potentials offered by this sector are enormous if entrepreneurial dynamism, use of modern technologies of production and processing, and linkages to premium markets are established. The beef VCAD offers opportunities for modernizing and integrating domestic, regional and international beef trade and access to markets.

The objectives of the beef stakeholders meeting are to present the outcome of the beef value

sector development. The meeting will also sensitize donors and financing institutions on supporting some components of the Action Plan in partnership with PSDP.

The outcome of this important meeting will be for participants to map a way forward for the sector to pursue and/or implement it.

Interested stakeholders and the general public are therefore invited to take part in the beef sector plenary sessions which will be held in the framework of the Global Expo, from 17 to 19 November 2014 in Gaborone, Botswana. Global Expo is a Botswana Investment and Trade Centre (BITC) platform for developing partnerships in Botswana.

The participants will include the Ministry of Agriculture, National Strategy Office, Ministry of Trade and Industry,

Botswana National Beef Producers Union, SMMs of the beef sector, SADC beef associations, EU beef associations, financing institutions and donors, intermediary organisations (e.g. BEMA, BITC, BIH, BOCCIM, BOBS, BNPC, LEA, etc.) and service providers of the beef industry.

chain analysis including the Action Plan; to facilitate the dialogue between the public and private sector entities involved in the beef industry, and to benefit from best practices from Southern African and European Union beef



**The Private Sector Development Programme is a Government of Botswana initiative supported by the Ministry of Trade and Industry, European Union, the Centre for the Development of Enterprise and BOCCIM**

With the support of:



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## Notes to the Editors

### Background of the Private Sector Development Programme

The PSDP was launched in May 2013 to provide a systematic and coherent framework to promote the development and growth of the private sector. It has identified milestones, bottlenecks and interventions that will contribute towards establishing an enabling environment that will spur entrepreneurial development; attract foreign and domestic private investment and simultaneously create business opportunities. The PSDP responds to the aspiration of Vision 2016 and the theme of the National Development Plan (NDP) 10, 2009- 2016.

It is an initiative of the Government of Botswana represented by the Ministry of Trade and Industry (MTI) and Ministry of Finance and Development Planning (MFDP), in partnership with the European Union (EU). The programme is supported by the Centre for the Development of Enterprise (CDE) and Botswana Confederation of Commerce Industry and Manpower (BOCCIM). The programme will run for 3 (three) years and has a budget of €2.3 million.

### PSDP Partner Entity Profiles

The **Ministry of Trade and Industry (MTI)** is the supervising agency of the PSDP. The MTI's mandate is to provide a conducive environment for growing the economy and creating wealth through investment, industrialization, economic diversification and trade. Through the Economic Diversification Drive (EDD), MTI strives for diversification of the economy through the development of globally competitive enterprises. The EDD envisages development of globally competitive enterprises that need little or no Government support. (<http://www.mti.gov.bw/home>)

The **European Union (EU)** is the contracting authority of the PSDP. The EU is an economic and political partnership between 28 European countries that together cover much of the continent. The EU aims to promote the **competitiveness** of industry and businesses and enhance **job creation** and **economic growth** by creating a business-friendly environment, particularly for small businesses and the manufacturing industry, all over the world. Special attention is given to the needs of small and medium-sized enterprises (SMEs). Supporting SMEs and promoting entrepreneurship is the key to economic diversity. ([http://europa.eu/index\\_en.htm](http://europa.eu/index_en.htm))

The **Ministry of Finance and Development Planning (MFDP)** sits on the PSDP Management Committee. The overall mandate of the MFDP is to coordinate national development planning, mobilise and prudently manage available financial and economic resources. Further to that the Ministry is responsible for the formulation of economic and financial policies for sustainable economic development. (<http://www.finance.gov.bw/index.php>)

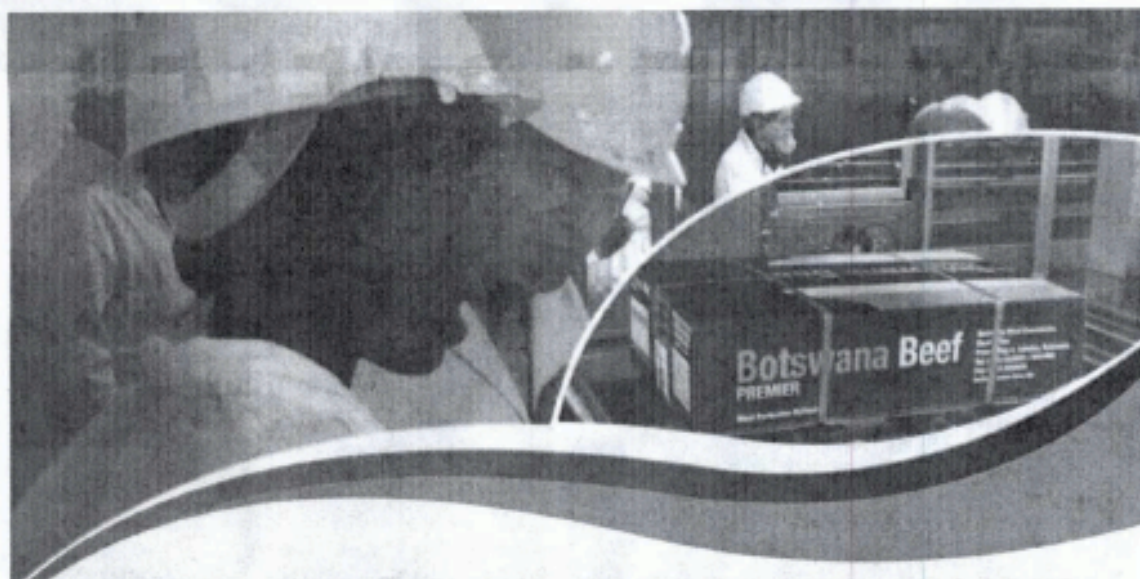
The **Centre of the Development of Enterprise (CDE)** is the executing agency of the PSDP. CDE is a joint institution of the African, Caribbean, Pacific (ACP) Group of States and the European Union (EU), within the framework of the Cotonou Partnership Agreement. Its **mandate** is to support the development of the ACP private sector. CDE provides non-financial services (consultancy, technical assistance, studies, training) to ACP companies, especially SMEs and intermediary organisations (chambers of commerce, professional associations, business services providers, etc.), and to joint initiatives of ACP and EU economic operators. (<http://www.cde.int/en>)

The **Botswana Chamber of Commerce, Industry and Manpower** is the internal monitoring body of the PSDP. BOCCIM is a Business Association of Employers representing employers in all sectors of the Botswana economy in an advocacy capacity. BOCCIM has been the vanguard and main voice of the private sector in Botswana. The organisation has protected the economic interests of the business community and through its philosophy of constructive policy dialogue, BOCCIM has won the confidence and respect of Government and other stakeholders in Botswana. (<http://www.boccim.co.bw/index.php>)

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Ends





## BOTSWANA'S BEEF VALUE CHAIN FROM ASSETS TO INVESTMENT

Between the 17<sup>th</sup> and 19<sup>th</sup> of November 2014, a Public - Private Dialogue (PPD) on the Beef Value Chain took place as part of the Global Expo. This PPD meeting was held within the framework of the Private Sector Development Programme, which has identified bottlenecks in the beef value chain and presented recommendations for upgrading the competitiveness of the sector. The PPD Meeting was facilitated by the Centre for the Development of Enterprise (CDE) and International Trade Centre. This event received valuable support from Botswana financial institutions (CEDA, NDB, Standard Chartered Bank) and from PSDP partners BOCCIM and BITC. Delegates included representatives from Botswana, Kenya, Namibia, Swaziland, South Africa, Zambia, Zimbabwe, Belgium, Ireland, Italy and the UK.

In his keynote address at the opening of the Global Expo, Hon. Minister of Trade and Industry, Vincent Seretse, commented on the PPD meeting, saying, "The analysis of the beef value chain will enable us to share the available opportunities that can be exploited by the whole chain by potential investors."

At independence, the beef sector contributed about 40% to the GDP, a figure that has since fallen to 2.5% in recent years. Its minuscule contribution has been the result of a series of problems throughout the value chain. Despite this, the sector has immense potential for growth and profit.

Alexander Baum, Head of the EU Delegation to Botswana said, "The EU has been a lucrative market for Botswana beef for many years and we believe it is a market that offers the best value for Botswana cattle farmers. EU citizens adore Botswana beef and as such the

EPAs open up the market for Botswana farmers. To this end the EPA presents a golden opportunity for increasing exports of Botswana beef to the EU market, provided that EPA conditions such as implementation of a livestock Identification and Traceability System are met."

The beef sector has in recent years been experiencing a series of challenges, including the pervasiveness of Foot and Mouth Disease (FMD), various other challenges faced by beef producers, as well as market compliance and access.

Head of CDE Regional Office for Southern Africa, Sid Boubekeur, said, "I have realised that the beef 'sector', as such, is fragmented. Clearly, there is a total lack of communication and partnership between the stakeholders, resulting in the failure to develop a healthy, sustainable, competitive and profitable sector. The beef PPD meeting, therefore, was to put together the concerned stakeholders to bridge this gap."

In response to these challenges, several delegates from the Botswana beef industry made presentations about their research into and observations about the local beef value chain, taking the entire chain into consideration, including: beef production (farming methods), market research and regulations, traceability, the cattle throughput of the Botswana Meat Commission (BMC), market liberalisation and regional and international best practice in the beef sector. Their presentations spoke to specific challenges faced by the local market, offering potential solutions to the problems faced by the industry.

Several experts from SADC and other African countries also shared

experiences, perspectives and case studies from the beef industries of their home countries. Topics that were discussed included market intelligence information and market diversification, management of FMD, and farmers' capacity building including lobbying actions.

Part of the PPD Meeting included a field visit to a cattle feedlot farm in Mmamashia, where delegates were able to gain an appreciation of the feedlot method and the processes that are undertaken in order to supply the BMC. Following this, participants had the opportunity to visit the BMC and observe the processes that the Commission undertakes in order to produce Botswana beef. CEO of the BMC, Dr. Akelele Tumbale, said that even though the BMC has experienced structural challenges and deficiencies in throughput, Botswana beef remains desirable because it is tender, succulent and organic. He emphasised that once farmers are adequately capacitated and begin to implement progressive farming methods, the quality and quantity of local beef has the potential to increase. Delegates got to see the entire production chain at BMC, from the freshly - slaughtered cows through deboning, primary cuts and tracing mechanisms before the beef is packaged and sent to market.

The PPD Meeting was an opportunity for stakeholders in the beef industry to air their concerns and challenges with regards to their industry, and discuss the way forward on how to add value and increase profitability in the sector. Ideas on the way forward for the sector included: branding Botswana beef, gathering market intelligence information and the capacitation of farmers' associations in order for them to render better services to their members.

## 12. Annex 5: Photos



Figure 1: PPD participants visiting a feedlot North of Gaborone



Figure 2: PPD participants visiting BMC's abattoir in Lobatse





Figure 3: A box containing prime quality Botswana beef ready to be exported